



USER GUIDE

ABOUT HORIZON360

Horizon360 Referral and Reporting System is the communication tool for credit unions to submit referrals of their members who are in the market to purchase a vehicle. These referrals are received by an Automotive Avenues Member Experience Advisor who will guide them through the auto shopping and buying process.

Within Horizon360, you are able to:

- Submit and update referrals
- Check referral status
- Retrieve data and reports
- Review rewards and contests

The intent of this User Guide is to provide how-to instructions of the use of the primary areas of Horizon360.

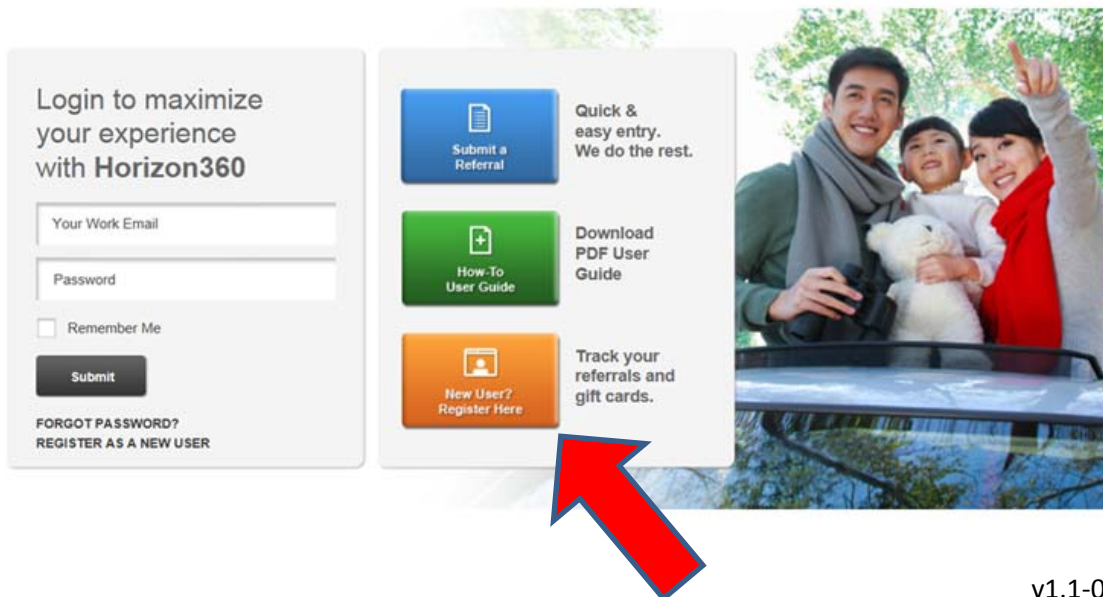
LOGGING IN

Website Address: www.MyHorizon360.com. Remember logging in is essential to receive rewards, to track statuses of referrals and for you and your managers to view reports and results for the credit union.

If you do not have a login, you may request one from the homepage by clicking the orange Register Here button. This may take up to 1 business day for approval. Your manager can approve you quicker by updating their Manage My Staff page.



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If you do have a login, as a reminder, your login is your work email address and your temporary password is:

horizon

We recommend selecting Remember Me so you don't have to login in again. We also recommend changing this temporary password by clicking the MY ACCOUNT link at the top right hand side of the screen.



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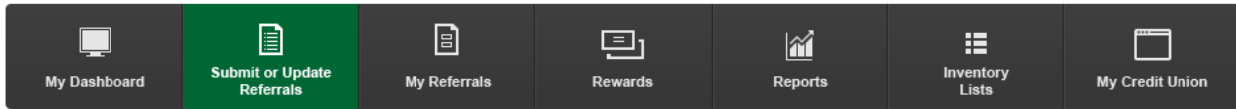
SUBMITTING A REFERRAL

To submit a referral, click on the Submit or Update Referrals button on the top navigation bar.

You will see the Submit or Update Referrals form. There are three steps to this form:

1. **Referral Search** – enter four basic pieces of information to confirm if this member has already been entered into Horizon360 as a referral.
2. **Referral Results** – any results will display in this section.

- a. If there are no results, you will see the notification, then you can click the Create a New Referral button.
 - b. If there are results to your search, peruse the results, and pick the correct referral to edit.
3. **Submit a Referral** – this is the primary form for member information. You may also edit an existing referral in this area.
 - a. There are 5 expandable and contracting sections: Member Info, Co-Borrower, Pre-Approval, Vehicle Preference and Trade In. Fill in as much information as you have been able to gather from the member, then click the Submit Referral button at the bottom. This referral will be received immediately by Automotive Avenues and assigned to the appropriate Member Experience Advisor to assist the member with their vehicle needs.



Submit or Update a Referral

1. Referral Search

2. Referral Results

Click on a row below to edit referral

NAME	DATE OF REFERRAL	PHONE NUMBER	EMAIL
NO RESULTS			

3. Submit a Referral

Member Info	Completed 0 of 9	^
Co-Borrower	Completed 0 of 7	^
Pre-Approval	Completed 0 of 8	^
Vehicle Preferences	Completed 0 of 17	^
Trade In	Completed 0 of 5	^

Referral Completion:



Current Lead Status:

Lead History	Date Submitted

ADDITIONAL FEATURES OF THE SITE

- **Update Referrals:** If a referral has already been entered into Horizon360, a different user at the same credit union can update the referral with updated and corrected information such as another phone number, pre-approval information or vehicle preferences.
- **Referral Statuses:** In Horizon360, you can now see the status of the referral. The system will update with our CRM database overnight and display the current status of the member in the buying process.
- **Dashboards:** New dashboards were added to the site, to provide a quick snapshot of referrals, sold referrals, rewards, branch results and credit union-wide results. These dashboards will allow you to stay informed of your referrals quickly and efficiently.
- **Data & Reports:** The reporting functionality within Horizon360 is customizable and very easy to use. Simply click the Reports button from the top navigation bar and there will be numerous reports to choose from, and customizable date range for each report.
- **Inventory Lists:** You may also print inventory lists with fresh inventory every day from the site. There are two lists available: by make/model and by price.

QUESTIONS?

Please contact your assigned Automotive Avenues Business Development Manager or call the Marketing department at Automotive Avenues for any additional assistance. One-on-one training or group training can also be arranged.

Automotive Avenues Marketing Department
303.750.5000
automotiveavenuesmarketingteam@autoaves.com

You may also contact us by clicking the Contact Us form on the top right of the website to communicate how we can help you further.