



## Integration Guide

RouteOne's innovative Dealer Management System (DMS) integration solution enables an exchange of credit application and credit decision information between RouteOne and ADP Elite. Fields on the RouteOne credit application are populated with information obtained electronically from ADP Elite, thereby eliminating duplicate data entry.

### Importing Deals from ADP to RouteOne

Importing a credit application from your ADP F&I or WAQ system is quick and easy. At a minimum you must have the applicant's name, address, city, state, and zip code entered in your ADP Elite system to import a deal to RouteOne. To begin **you will need the ADP deal number** you wish to import into RouteOne.

1. Click the **ADP Import** button located on the upper right hand side of the **Deal Manager screen**.

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News Info | Deals | New App | eContracts | Credit Reports | Vehicle Values | F&I Exchange | Rates & Forms | Reports | Admin

### Deal Manager

SEARCH: Applicant Last/Business Name | GO | Advanced Search | Clear Search

NOW SHOWING: 30 Days of All vehicles Always show deals like this? Yes

Update | Print | UnLock | **ADP Import**

APPLICANT (CO-APPLICANT)	ACTIONS	USER	LOG
<b>Smith, Mary</b> Bank A ↑	ADD FS   Edit More	UATUS01	08/08 3:55 PM
<b>Doe, John</b> Bank B ↓	ADD FS   Edit More		08/05 11:01 AM
<b>Smith, Jane</b> Bank C ▲	ADD FS   Edit More		08/05 10:55 AM
<b>Hart, Leo</b> Exclusive Lending ↓	ADD FS   Edit More	UATUS01	07/30 9:47 AM
<b>Stone, Jeanne</b> Bank A ↑	ADD FS   Edit More		07/25 9:23 AM
<b>Whittington, Stephanie</b> Captive Lending ▲	ADD FS   Edit More	UATUS01	07/24 9:45 AM

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Number of records to display per page: 10 25 50 100

Approved | Conditioned | Declined | Error | Booked | Funded | Contract Held | FS App from Finance Source  
DSP App from Dealer Service Provider | Sold | Delivered | A/A Adverse Action Notice Created | New Message | Read Message  
Credit Report Run

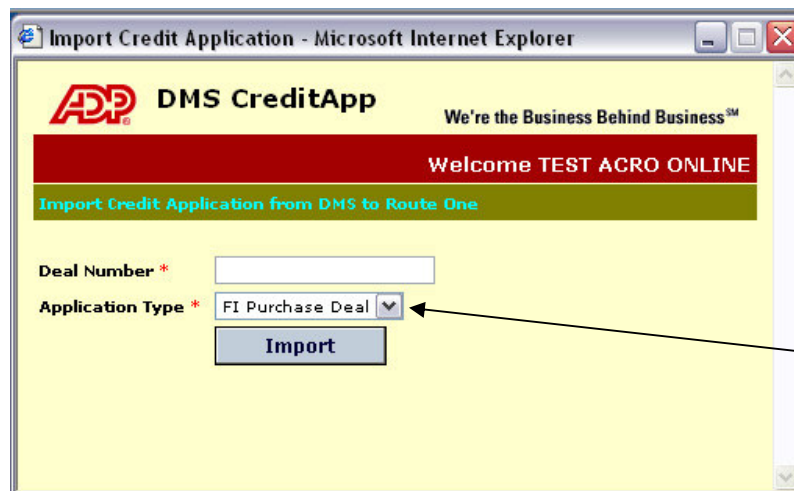
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**NOTE:** When importing or exporting your first application, a pop window may display asking if you would like to install the **Java 2 Run Time Environment software**, necessary to continue with the importation or exportation process. Click the **'Always'** button and then follow the installation screen prompts to complete installation. This is a one time event. You may also install this software at any time by visiting <https://gateway.tempe.ds.adp.com/CreditGateWay/Login.jsp>.

2. A windows **'Security Alert' pop-up screen** will display. Click the **'Yes' button** and the *ADP Import pop-up screen* will display.



3. Within the *ADP pop-up screen* enter the **ADP deal number** of the application to import and make a selection from the *'Application Type' drop down box*. Click the **'Import' button**.




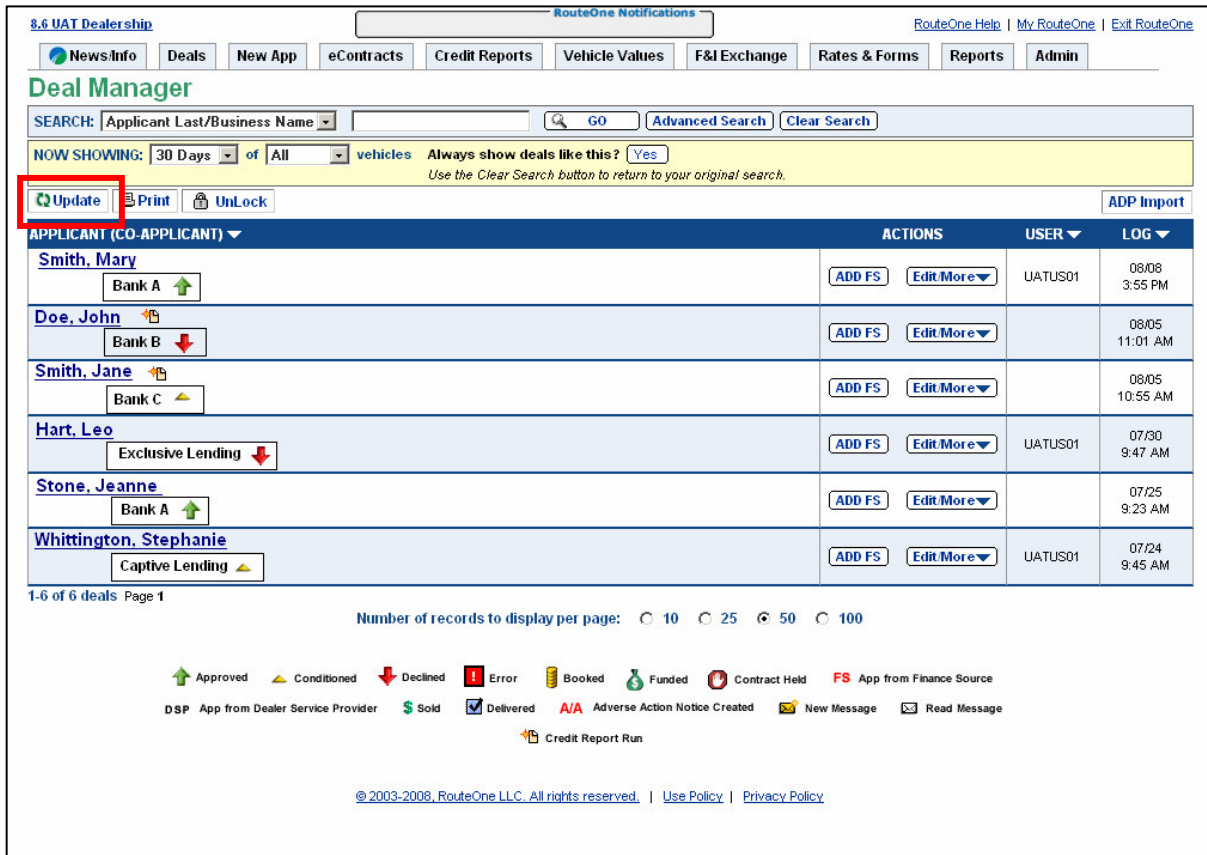
This is the F&I area of DMS where you entered the deal. Select from:

- FI Purchase
- FI Lease
- WAQ Purchase
- WAQ Lease

4. Upon successful import a confirmation message will display. From the *ADP Confirmation screen* click the **'OK' button**.



- Click the  button located in the upper left hand side of the screen. The page will refresh and the imported application will display as the first record in the Deal Manager.




8.6 UAT Dealership RouteOne Notifications [RouteOne Help](#) | [My RouteOne](#) | [Exit RouteOne](#)

News/Info Deals New App eContracts Credit Reports Vehicle Values F&I Exchange Rates & Forms Reports Admin

### Deal Manager

SEARCH: Applicant Last/Business Name

NOW SHOWING: 30 Days of All vehicles Always show deals like this?  Yes  
Use the Clear Search button to return to your original search.



APPLICANT (CO-APPLICANT) ▼	ACTIONS	USER ▼	LOG ▼
<b>Smith, Mary</b> Bank A	<input type="button" value="ADD FS"/> <input type="button" value="Edit More"/>	UATUS01	08/08 3:55 PM
<b>Doe, John</b> Bank B	<input type="button" value="ADD FS"/> <input type="button" value="Edit More"/>		08/05 11:01 AM
<b>Smith, Jane</b> Bank C	<input type="button" value="ADD FS"/> <input type="button" value="Edit More"/>		08/05 10:55 AM
<b>Hart, Leo</b> Exclusive Lending	<input type="button" value="ADD FS"/> <input type="button" value="Edit More"/>	UATUS01	07/30 9:47 AM
<b>Stone, Jeanne</b> Bank A	<input type="button" value="ADD FS"/> <input type="button" value="Edit More"/>		07/25 9:23 AM
<b>Whittington, Stephanie</b> Captive Lending	<input type="button" value="ADD FS"/> <input type="button" value="Edit More"/>	UATUS01	07/24 9:45 AM

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Number of records to display per page:  10  25  50  100

Approved Conditioned Declined Error Booked Funded Contract Held FS App from Finance Source  
 DSP App from Dealer Service Provider Sold Delivered A/A Adverse Action Notice Created New Message Read Message  
 Credit Report Run

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### Submitting Imported Deals to a Finance Source

To submit an imported application to a Finance Source, simply click on the primary applicant's name in the Deal Manager and you will be taken through the RouteOne application submission process used for all applications. Data entered in ADP will populate the RouteOne credit application; however you must still complete all required fields highlighted in yellow and add at least one Finance Source before submitting the application.

## Exporting Deals from RouteOne to ADP

1. From the RouteOne Deal Manager Screen, click the on Edit/More button for the application you wish to export. Select Export Application to DMS.

The screenshot shows the RouteOne Deal Manager interface. At the top, there are navigation tabs for News/Info, Deals, New App, eContracts, Credit Reports, Vehicle Values, F&I Exchange, Rates & Forms, Reports, and Admin. The main heading is "Deal Manager". Below this is a search bar with "SEARCH: Applicant Last/Business Name" and a "GO" button. A filter bar shows "NOW SHOWING: 30 Days of All vehicles" and a checkbox for "Always show deals like this? Yes". There are buttons for "Update", "Print", "UnLock", and "ADP Import".

The main content area is a table with columns: APPLICANT (CO-APPLICANT), ACTIONS, USER, and LOG. The table lists several deals:

APPLICANT (CO-APPLICANT)	ACTIONS	USER	LOG
Smith, Mary Bank A ↑	ADD FS Edit More	UATUS01	08/08 3:55 PM
Doe, John Bank B ↓	ADD FS Edit More		08/05 11:01 AM
Smith, Jane Bank C ↑	ADD FS Edit More		08/05 10:55 AM
Hart, Leo Exclusive Lending ↓	ADD FS Edit More	UATUS01	07/30 9:47 AM
Stone, Jeanne Bank A ↑			07/25 9:23 AM
Whittington, Stephanie Captive Lending ↑		UATUS01	07/24 9:45 AM

A context menu is open over the "Edit More" button for the "Hart, Leo" deal. The menu items are: Edit this Application, Remove Co-Applicant, Swap Applicant/Co-Applicant, View/Print this Application, Create Adverse Action Notice, Credit Reports, Show all Copies of this App, Delete this Deal, and **Export Application to DSP** (highlighted with a red box).

At the bottom of the table, there is a legend for deal statuses: Approved (green up arrow), Conditioned (yellow triangle), Declined (red down arrow), Error (red exclamation mark), Booked (yellow book icon), Funded (green dollar sign), Contract Held (red circle with slash), FS App from Finance Source (red FS), DSP App from Dealer Service Provider (blue DSP), Sold (green dollar sign), Delivered (checkbox), A/A Adverse Action Notice Created (red AA), New Message (yellow envelope), Read Message (grey envelope), and Credit Report Run (yellow document icon).

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2. A RouteOne Export Options Screen will display.

The screenshot shows the "DMS Export" screen for deal "LAMB, JOHN". The deal details are: Vehicle: NEW 2004 SPECIAL COUPE, Co-Applicant: CRAFT, JULIEX, Transaction Type: Retail, Amount Financed: \$24901.

There are two radio buttons for selection: "Export Application" (selected) and "Export Application & Finance Source Information".

Below the "Export Application" option is a table with columns: USERNAME, EXPORT, and TIME OF EXPORT.

USERNAME	EXPORT	TIME OF EXPORT
History Log		
ANTHONY123	✓	01/27/2005 - 3:37 PM

At the bottom right, there are "Cancel" and "Export" buttons.

3. Select one of the following:

- **Export Application Only:** Select this option to export the credit application (excluding any credit decision) to your ADP Elite system.
- **Export Application & Finance Source Information:** Selecting this option will export the credit application and the credit decision details to your ADP Elite system.

**DMS Export**  
**LAMB, JOHN**

Vehicle: NEW 2004 SPECIAL COUPE      Applicant: CRAFT, JULIE X  
Transaction Type: Retail  
Amount Financed: \$24901

Export Application  
 Export Application & Finance Source Information

DECISION	USERNAME	EXPORT	TIME OF EXPORT
<b>FINANCE SOURCE 1</b>			
<input type="radio"/> APPROVED - 01/13/2005 - 9:35 AM	ANTHONY123		01/27/2005 - 3:37 PM
<input type="radio"/> PRELIMINARY - 01/12/2005 - 5:10 PM			

DECISION	USERNAME	EXPORT	TIME OF EXPORT
<b>FINANCE SOURCE 2</b>			
<input type="radio"/> APPROVED - 01/12/2005 - 8:19 AM			
<input type="radio"/> PRELIMINARY - 01/12/2005 - 8:12 AM			

Continue the export process by clicking the radio button  next to the decision you wish to export, and then click the  button. Your exported deal is now available in your ADP Elite system.

4. An ADP pop-up screen will display. Within the **ADP pop-up screen** you will see the **RouteOne application number** being exported in the 'Deal Number' field. Make a selection from the 'Application Type' drop down box and click the 'Export' button.

Export Credit Application - Microsoft Internet Explorer

**ADP DMS CreditApp**      We're the Business Behind Business<sup>SM</sup>

Welcome TEST ACRO ONLINE

Export Credit Application from Route One to DMS

Deal Number \*    01-1-90309467

Application Type \*    FI Purchase Deal

This is the F&I area of DMS where you want the deal to go. Select from:

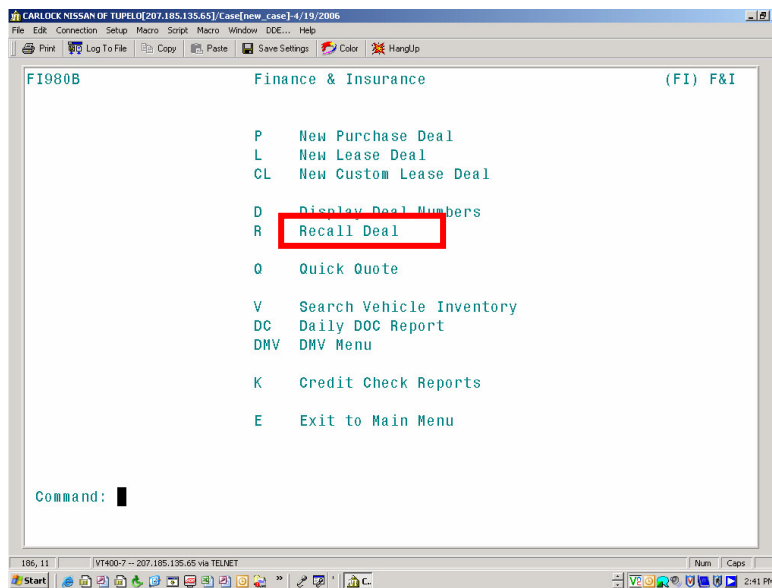
- FI Purchase
- FI Lease
- WAQ Purchase
- WAQ Lease

5. Upon successful export a confirmation message will display showing your new ADP deal number. From the *ADP Confirmation screen* click the **'OK' button**. Use your new ADP Deal number to retrieve the deal in your ADP integrated F&I module.

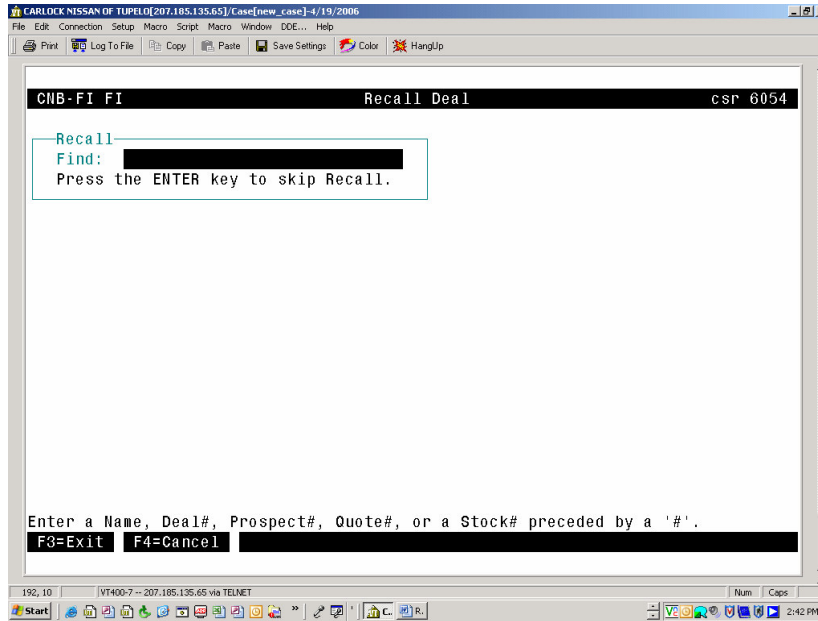


### Locating an Exported Deal in ADP Elite

1. Work from this screen for all the F&I deals. When trying to find an exported deal, type "R" to **Recall a Deal**.



2. Enter the deal number assigned when the deal was exported from RouteOne to ADP.



## RouteOne Dealer Reports

The RouteOne system can generate a variety of reports to help you better manage your business and identify opportunities to increase profits. Each night, RouteOne will retrieve a file from ADP Elite detailing ALL of your dealership's closed or finalized deals. The next morning, when you login to RouteOne, you can run various performance reports including all your F&I activities and transaction details for extracted records, regardless of whether the deal originated in ADP Elite or RouteOne. As a RouteOne ADP Elite integrated dealer you have access to the following reports:

- Finance & Insurance Log Report:** Provides a comprehensive sales record, displaying relevant attributes for each sales transaction and totals/averages for the selected date ranges and input parameters. This report closely models many of the manual and automated F&I Logs used today.

Dealer: Landmark Dodge					Run On: 11/09/2006															
Date Range: 11/07/2006 to 11/07/2006					Run By: Mapes, W.															
Report On: Dealer/Dealer Group																				
Additional Summary: Car/Truck																				
Include Transaction Detail: Yes																				
F&I Manager Count:	2																			
Salesperson Count:	8				DOP Finance and Insurance Load Exceptions: 0															
Total					New				Used											
Total (\$)	Units	Pct%	Avg (\$)	PVR (\$)	Total (\$)	Units	Pct%	Avg (\$)	PVR (\$)	Total (\$)	Units	Pct%	Avg (\$)	PVR (\$)						
Sales Gross	175,774.70	100	1,757.75		77,381.84	82	1,488.11			102,393.16	48	2,133.19								
Finance Reserve	20,893.84	79	79.0	283.72	208.34	11,833.84	43	82.7	276.21	227.67	9,060.00	38	76.0	250.00	187.60					
Life Insurance	3,120.30	10	12.7	312.03	31.20	1,293.80	4	9.3	323.45	24.83	1,826.50	6	16.7	304.42	38.05					
Disability Insurance	6,112.50	8	10.1	764.06	61.13	3,716.70	5	11.5	743.34	71.48	2,395.80	3	8.3	798.60	45.91					
CI Total	9,232.80	18	22.8	612.93	92.33	5,010.50	9	20.9	668.72	98.38	4,222.30	9	26.0	488.14	87.86					
GAP	10,237.57	40	80.6	255.94	102.38	5,796.32	23	53.8	252.01	111.47	4,441.25	17	47.3	261.26	92.93					
Service Contract	29,942.31	39	39.0	767.75	299.42	13,821.66	18	34.6	767.87	269.80	16,120.65	21	43.8	767.66	335.85					
QAP/SC Total	40,179.88	79	608.81	401.80	18,617.98	41	478.48	377.27	20,691.90	38	641.10	428.37								
Alarm	3,316.84	12	12.0	276.32	33.16	1,697.92	8	11.5	276.32	31.88	1,697.92	8	12.9	276.32	34.54					
Paint	1,952.48	8	8.0	244.06	19.52	976.24	4	7.7	244.06	18.77	976.24	4	8.3	244.06	20.34					
Fabric	1,422.72	6	6.0	237.12	14.23	711.36	3	5.8	237.12	13.68	711.36	3	6.3	237.12	14.82					
Simontze	711.36	3	3.0	237.12	7.11	711.36	3	5.8	237.12	13.68	711.36	3	6.3	237.12	14.82					
Total Other Products	7,992.48			79.92	4,998.78			78.92	4,998.78		9,246.64			87.82						
F&I Total	77,648.95			776.48	40,619.11			778.21	37,029.84		771.48									
New Car					Used Car				New Truck				Used Truck							
Total (\$)	Units	Pct%	Avg (\$)	PVR (\$)	Total (\$)	Units	Pct%	Avg (\$)	PVR (\$)	Total (\$)	Units	Pct%	Avg (\$)	PVR (\$)	Total (\$)	Units	Pct%	Avg (\$)	PVR (\$)	
Sales Gross	40,574.40	27	77.8	1,502.76		55,023.19	26	2,147.05		36,807.14	25	1,472.29			46,559.99	22	2,116.82			
Finance Reserve	6,874.29	21	77.8	279.73	217.68	3,760.00	16	67.7	250.00	144.23	6,969.81	22	88.0	270.89	238.38	6,260.00	21	96.6	260.00	238.84
Life Insurance	970.35	3	14.3	323.45	35.94					323.45	1	4.5	323.45	12.94	1,826.50	6	28.5	304.42	83.22	
Disability Insurance	2,230.02	3	14.3	743.34	82.59	1,597.20	2	13.3	798.60	61.43	1,486.68	2	9.1	743.34	59.47	798.60	1	4.8	798.60	36.30
CI Total	3,200.37	6	28.6	693.40	118.53	1,697.20	2	13.3	798.60	61.43	1,810.13	3	13.8	603.38	72.41	2,626.10	7	33.3	376.01	118.82
GAP	3,780.15	15	71.4	252.01	140.01	1,528.76	7	46.7	261.25	70.34	2,016.17	8	36.4	252.02	80.65	2,612.50	10	47.5	261.25	118.75
Service Contract	6,142.96	8	29.6	767.87	227.52	8,444.15	11	42.3	767.65	324.78	7,678.70	10	40.0	767.87	307.15	7,676.50	10	45.5	767.65	348.93
QAP/SC Total	9,823.11	23	481.44	387.52	10,272.90	18	670.72	395.11	9,894.87	18	638.80	387.79	10,289.00	20	614.46	487.88				
Alarm	552.64	2	7.4	276.32	20.47	1,105.28	4	15.4	276.32	42.61	1,105.28	4	15.0	276.32	44.21	552.64	2	9.1	276.32	35.12
Paint	474.24	2	7.4	237.12	17.55	244.06	1	3.8	244.06	9.39	976.24	4	16.0	244.06	39.05	732.18	3	13.6	244.06	33.28
Fabric	237.12	1	3.7	237.12	8.78	474.24	2	7.7	237.12	18.24	237.12	1	4.0	237.12	9.48	237.12	1	4.5	237.12	10.78
Simontze	1,264.00			48.81	1,823.68			78.14	2,782.79	111.71	1,422.08			64.64						
Total Other Products																				
F&I Total	20,281.71			760.43	17,443.88			670.81	20,267.40		810.50			18,688.18						

All summary calculations exclude deals with turnover indicator = N

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- **Decision Analysis (Time and Mix) Report:** Allows you to monitor decision time and mix, by Finance Source, for your decided credit applications.

Dealer Decision Analysis (Time & Mix)												
Dealer: <b>Landmark Dodge</b>										Run On: 11/06/2006 Run By: Mapes, W.		
Finance Source: All Date Range 1: 11/07/2005 to 11/05/2006 Date Range 2: New/Used/Demo: All Transaction Type: All												
Decision Analysis Summary - 11/07/2005 to 11/05/2006												
Finance Source	Total			Approved			Conditioned			Declined		
	Avg. Dec. Time	Applications	Applicants	Avg. Dec. Time	Applications	Applicants	Avg. Dec. Time	Applications	Applicants	Avg. Dec. Time	Applications	Applicants
FMCTst	33m 57s	23	23	1h 15m 46s	10 43.50 %	10 43.50 %	1m 13s	7 30.40 %	7 30.40 %	2m 26s	6 26.10 %	6 26.10 %
GMCTst	1m 33s	19	19	1m 8s	5 26.30 %	5 26.30 %	1m 5s	8 42.10 %	8 42.10 %	2m 31s	6 31.60 %	6 31.60 %
CFCTst- US	66m 42s	15	15	1h 24m 55s	10 66.70 %	10 66.70 %	13s	2 13.30 %	2 13.30 %	17s	3 20.00 %	3 20.00 %
Ford Credit	11m 41s	8	8	3m 7s	6 75.00 %	6 75.00 %	1h 14m 25s	1 12.50 %	1 12.50 %	23s	1 12.50 %	1 12.50 %
TFSTst US	13s	2	2				9s	1 50.00 %	1 50.00 %	17s	1 50.00 %	1 50.00 %
Clarkston Credit Union (2498627180)		1	1		1 100.00 %	1 100.00 %						
W3R-Optional	47m 37s	1	1	47m 37s	1 100.00 %	1 100.00 %						

- **Time Sales Analysis Report:** Provides share analysis by Finance Source showing finance penetration both as a percentage of total vehicle sales as a percentage of finance contracts (available “time sales”).

Dealer Time Sales Analysis (TSA)				
<b>Dealer: Landmark Dodge</b>				Run On: 11/09/2006
				Run By: Mapes, W.
Finance Source: All				
Date Range 1: 11/02/2006 to 11/02/2006				
Date Range 2:				
New/Used/Demo: All				
Transaction Type: All				
Vehicle Year: All				
Vehicle Make: All				
Vehicle Model: All				
<b>Summary - 11/02/2006 to 11/02/2006</b>				
SALES	Finance Source	# Contracts	% Total Sales	% Time Sales
200	GMAC *	44	22.00 %	27.85 %
	BANK OF AMERICA	40	20.00 %	25.32 %
	BANK OF AMERICA *	28	14.00 %	17.72 %
	CITIFINANCIAL *	26	13.00 %	16.46 %
	AMERICREDIT *	20	10.00 %	12.66 %
<b>TOTALS</b>		<b>158</b>	<b>79.00 %</b>	<b>100.00 %</b>
* Dealer assigned Finance Source				
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