



Integration Guide

The RouteOne Autobase integration enables one-way exchange of customer application information from your Autobase system to RouteOne. Fields on the RouteOne credit application can be populated with information obtained electronically from your Autobase system, thereby eliminating duplicate data entry.

Importing Deals from Autobase to RouteOne

Importing customer deal information from your Autobase system to RouteOne is quick and easy!

1. From the Autobase system, log into Autobase Sales Center or Loyalty Center.
2. Go to a customer record and click on the button labeled "Credit" or select Alt+T on your keyboard.

The screenshot shows the 'Client Search' window in the Autobase system. The selected client is Marian J. Adney, located at 9206 Summit Rd, Cherry Creek, CO 80204. The salesperson is Danny Kia. The current status is 'Sold' and the stage is 'Ordered'. A table of contacts shows a record for 1/25/2007 at 10:00 am with the comment 'Time to Trade Call' and staff member Bobby Beretta. The 'Next Contact' section is empty. The 'Vehicle of Interest' section shows a 'New 2004 Chevrolet Monte Carlo' with stock # 4CWW-2. The 'Road to the Sale' section has several checkboxes, most of which are unchecked. The 'Want List' button is visible. The toolbar at the bottom includes icons for 'Update', 'Letters', 'Search', 'Credit' (highlighted with a red box), 'Update', 'Old Sold', 'Email', 'Delete', 'Reports', and 'Combine'.

3. Fill in all fields that are on the credit screen. Certain fields are required in order to push to RouteOne. The fields required are indicated by a red asterisk (*). There are areas for both Buyer and Co-Buyer as well as for personal application vs. business application.

4. The application is divided into five different tabs of information: Addresses, Vehicle, Employment, Income, and Contract Info.
 - a. The Addresses tab is the area where you will choose the customer's residential information such as current and past addresses and then select what type of credit application is going to be submitted.

The screenshot displays the 'RouteOne Application' software interface. The 'Addresses' tab is selected and highlighted with a red box. The interface is divided into several sections:

- Applicant Information:** Includes fields for Salutation, First Name (MARIAM), Middle (J), Last Name (ADNEY), Suffix, Soc Sec #, License, State, Birthdate (03/06/1927), and Home Ph # (968-555-7314). A 'Switch App & Co-App' button is located below these fields.
- Co-Applicant Information:** Includes fields for Salutation, First Name, Middle, Last Name, Suffix, Soc Sec #, Drivers License, State, Birthdate, and Home Ph #. A 'Business Application' button is located below these fields.
- Finance Type:** Radio buttons for Retail, Lease, and Balloon.
- Current Address 1:** Includes a 'Residence Type' dropdown (set to 'Buying home'), Address 1 (9206 SUMMIT RD), Address 2, City (CHERRY CREEK), State, Zip (CO 80204), and 'How Long?' fields for Years and Months.
- Previous Address 2:** Includes Address 1, Address 2, City, State, Zip, and 'How Long?' fields for Years and Months.
- Co-Applicant Address 1:** Includes a 'Same As Applicant' checkbox, 'Residence Type' dropdown, Address 1, Address 2, City, State, Zip, and 'How Long?' fields for Years and Months.
- Co-Applicant Address 2:** Includes a 'Same As Applicant' checkbox, Address 1, Address 2, City, State, Zip, and 'How Long?' fields for Years and Months.
- Relationship:** A 'Relationship' dropdown (set to 'Other') and a 'Relationship Description' text field.

At the bottom of the window, there are buttons for 'Abort', 'Save & Exit', 'Send to RouteOne', 'Credit Forms', and 'Web Page'.

- b. The Vehicle tab is the area where you can choose a vehicle of interest from inventory or add a trade. The information will automatically be pulled from the main customer record by default.

RouteOne Application

Applicant

Salutation []

First Name MARIAN

Middle J

Last Name ADIEY

Suffix []

Soc Sec # - -

License, St []

Birthdate 03/06/1927

Home Ph # 968-555-7314

Switch App & Co-App

Co-Applicant

Salutation []

First Name []

Middle []

Last Name []

Suffix []

Soc Sec # - -

Drivers License, St []

Birthdate []

Home Ph # - -

Business Application

Addresses **Vehicle** Employment Income Contract Info

Vehicle of Interest

VIN []

Stock # 4CWW-2

Year 2004

Make Chevrolet

Model Monte Carlo

Odometer 0

New Used New

Sales Price \$0.00

Intended Use Personal

Veh. Details

Vehicle Trade

Date	Model	Traded	Appraised By	Miles
1/25/2007	1995 Buick Riviera			123765

Year 1995

Make Buick

Model Riviera

Add a Trade Edit a Trade

Abort Save & Exit Send to RouteOne Credit Forms Web Page

- c. The Employment tab is the area where you can fill out the customer's employment information.

RouteOne Application

Addresses Vehicle **Employment** Income Contract Info

Applicant		Current Employer		Previous Employer	
Salutation		Occupation	SALESPERSON		
First Name	MARIAN	Employer	ABC MOTORS		XYZ MOTORS
Middle	J	How Long?	10 Years 3 Months		4 Years 8 Months
Last Name	ADNEY	Emp-Status	Full Time		
Suffix		Employer Phone #	806-555-1212		
Soc Sec #	- -	Educ. Level	Some college		
License, St					
Birthdate	03/06/1927				
Home Ph #	968-555-7314				

Switch App & Co-App

Co-Applicant		Current Employer		Previous Employer	
Salutation		Occupation			
First Name		Employer			
Middle		How Long?	Years Months		Years Months
Last Name		Emp-Status			
Suffix		Employer Phone #	- -		
Soc Sec #	- -	Educ. Level	Unknown		
Drivers License, St					
Birthdate					
Home Ph #	- -				

Business Application

Abort Save & Exit Send to RouteOne Credit Forms Web Page

d. The Income tab is the area where you can fill out the customer's income information.

RouteOne Application

Addresses Vehicle Employment **Income** Contract Info

Applicant

Salutation: [v]
First Name: MARIAN
Middle: J
Last Name: ADNEY
Suffix: [v]
Soc Sec #: --
License, SI: [v]
Birthdate: 03/06/1927
Home Ph #: 968-555-7314

Switch App & Co-App

Gross Income

	Weekly	Bi-Weekly	Monthly	Annually	Source:
Employment:	\$1,000.00	\$2,000.00	\$4,333.33	\$52,000.00	
Other Income:	\$250.00	\$500.00	1083.33	\$13,000.00	Deliver Pizza
Total Income:	\$1,250.00	\$2,500.00	\$5,416.66	\$65,000.00	

Rent/Mortgage: []

Co-Applicant

Salutation: [v]
First Name: []
Middle: []
Last Name: []
Suffix: [v]
Soc Sec #: --
Drivers License, SI: [v]
Birthdate: []
Home Ph #: --

Business Application

Co-Applicant Gross Income

	Weekly	Bi-Weekly	Monthly	Annually	Source:
Employment:	[]	[]	[]	[]	
Other Income:	[]	[]	[]	[]	[]
Total Income:	[]	[]	[]	[]	

Rent/Mortgage: []

Abort Save & Exit Send to RouteOne Credit Forms Web Page

- e. The Employment tab is the area where you can fill out the customer's employment information.

RouteOne Application

Applicant

Salutation:

First Name: **MARIAN**

Middle: **J**

Last Name: **ADIEY**

Suffix:

Soc Sec #: **- -**

License, St:

Birthdate: **03/06/1927**

Home Ph #: **968-555-7314**

Switch App & Co-App

Co-Applicant

Salutation:

First Name:

Middle:

Last Name:

Suffix:

Soc Sec #: **- -**

Drivers License, St:

Birthdate:

Home Ph #: **- -**

Business Application

Addresses | Vehicle | **Employment** | Income | **Contract Info**

Cash Price: \$0.00

Sales Taxes:	1803.00	(+) This is NOT a monthly value.
Fee:	\$300.00	(+) This is NOT a monthly value.
Cash Down:	\$2,000.00	(-)
Rebates:	\$500.00	(-)
Trade Allowance:	\$2,500.00	(-) Gross Trade-In
Trade Owed:	\$100.00	(+)
Ins./Svc/Other:	\$800.00	(+) Amount for Extended Warranty
Financed Amount:	(\$1,997.00)	(=)

Term:	60	Length of contract in months
Cust. Rate %:	7	
MSRP:	\$32,000.00	
Wholesale/Inv:	\$30,000.00	

Abort | Save & Exit | Send to RouteOne | Credit Forms | Web Page

5. Once the information is filled out completely, the user will click on the “Send to RouteOne” button. The application will be sent to RouteOne.

Route One Application

Applicant

Salutation: [Dropdown]
First Name: MARIAN
Middle: J
Last Name: ADIEY
Suffix: [Dropdown]
Soc Sec #: --
Drivers License, St: [Dropdown]
Birthdate: 03/06/1927
Home Ph #: 968-555-7314

Co-Applicant

Salutation: [Dropdown]
First Name: [Text]
Middle: [Text]
Last Name: [Text]
Suffix: [Dropdown]
Soc Sec #: --
Drivers License, St: [Dropdown]
Birthdate: [Text]
Home Ph #: --

Addresses | **Vehicle**

Vehicle of Interest

VIN: 1GHDT13S12232I | Odometer: 83794
Stock #: 5B-129A | New Used: Used
Year: 2003 | Sales Price: \$13,910.00
Make: Oldsmobile
Model: Bravada

Vehicle Trade

Date	Model	Traded	Appraised By	Miles
1/25/2007	1995 Buick Riviera			123765

Year: 1995
Make: Buick
Model: Riviera

Buttons: Add a Trade, Edit a Trade, Inventory

Bottom Bar: Abort, Save & Exit, **Send to RouteOne**, Credit Forms, Web Page

Locating Imported Deals in the RouteOne Deal Manager

The *Deal Manager* is the hub of RouteOne. From here you can manage, locate, and review your deals. It is designed to help you quickly scan and check a deal's status using easy-to-read icons. Click the [Update Deals](#) 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.

The screenshot shows the RouteOne Deal Manager interface. At the top, there are navigation tabs for 'RouteOne', 'Applications', 'Credit Reports', 'autoValue', 'Rates & Forms', 'Reports', and 'Admin'. Below these are sub-tabs for 'Deal Manager', 'New Individual App', 'New Business App', and 'Cash/Other Deals'. A search bar is present with a 'GO' button and an 'Advanced Search' link. A note states 'A maximum of 200 deals will be returned for a specific search.' Below the search bar, there are filters for 'NOW SHOWING: 3 Days of All vehicles'. The 'Update Deals' button is highlighted with a red box. Below the filters, there are 'App Alert' and 'UnLock Apps' buttons. The main content area displays a table of deals with columns for 'APPLICANT (CO-APPLICANT)', 'ACTIONS', 'USER', and 'LOG'. The table contains 8 rows of deal information, including names like 'Smith, John', 'Rate, Test', 'schindler, kent', 'test, first', and 'Tim, Tom'. Each row includes 'ADD FS' and 'Edit More' buttons. At the bottom, 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), FS (Finance Source), DMS (Dealer Management System), Sold (green dollar sign), Delivered (checkbox), New Message (envelope), Read Message (envelope with check), and Credit Report Run (document icon). The footer contains copyright information: '© 2003-2006, RouteOne LLC. All rights reserved. | Use Policy | Privacy Policy'.

Submitting Imported Deals to a Finance Source

To submit an imported deal 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 into Autobase Sales Center or Loyalty Center will populate the RouteOne credit application; however, you must still complete all required fields highlighted in yellow and choose at least one Finance Source before submitting the application.