



Integration Guide

RouteOne's innovative Dealer Management System (DMS) integration solution enables an exchange of credit application and credit decision information between RouteOne and your DIS Showroom system. Fields on the RouteOne credit application to be populated with information obtained electronically from your DIS Showroom system, thereby eliminating duplicate data entry. Saved or sent applications in the RouteOne system can be easily imported and exported via your DIS Showroom system. In addition, the RouteOne DIS Showroom integration solution provides enhanced reporting on all F&I information extracted nightly from your DIS Showroom system. Closed or final deal information will automatically populate various performance reports in the RouteOne Dealer Reporting Suite.

Key features of this guide:

1. How to import credit applications to RouteOne from your DIS Showroom system
2. How to export credit applications and Finance Source decisions from RouteOne to your DIS Showroom system
3. How to view all your dealership's F&I activity in the RouteOne Reporting Suite from data extracted nightly from DIS Showroom.

Importing Deals from DIS Showroom to RouteOne

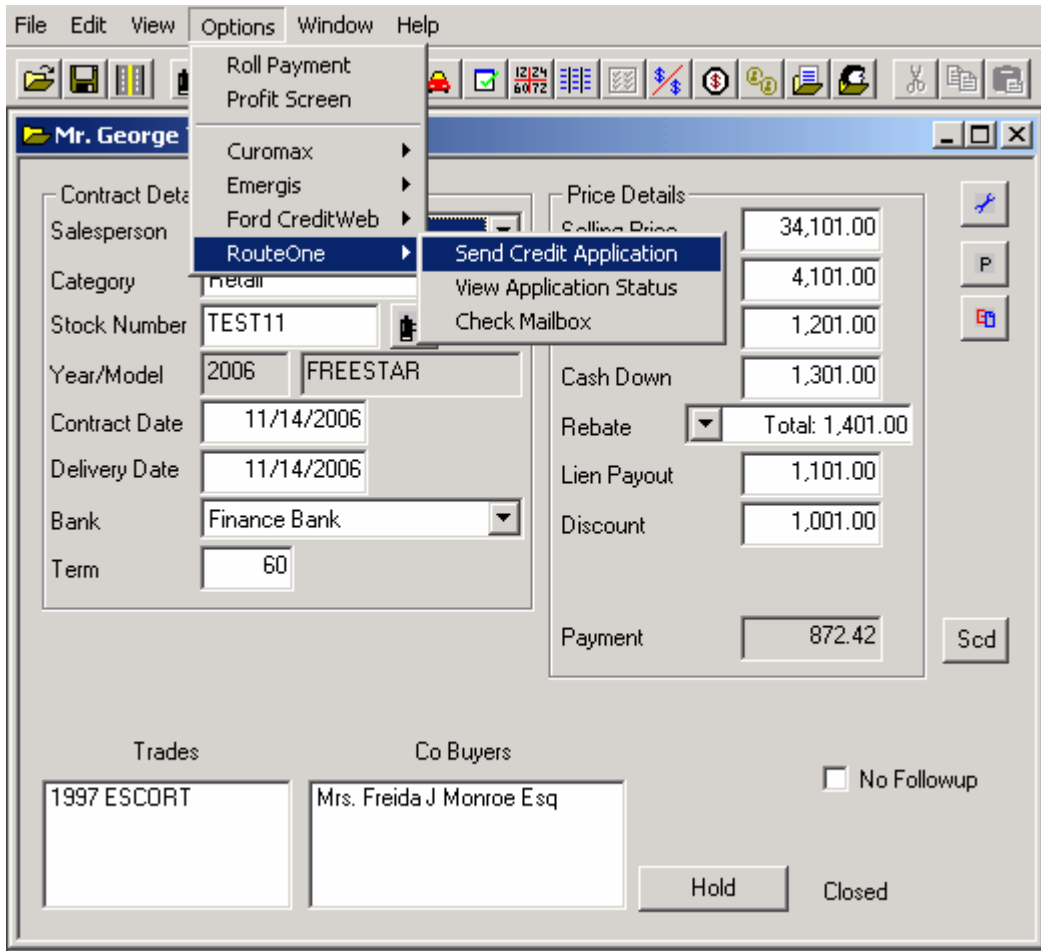
Importing customer deal information from your DIS Showroom system to RouteOne is quick and easy!

1. From your DIS Showroom system enter your deal and credit information as you normally would and save the deal.

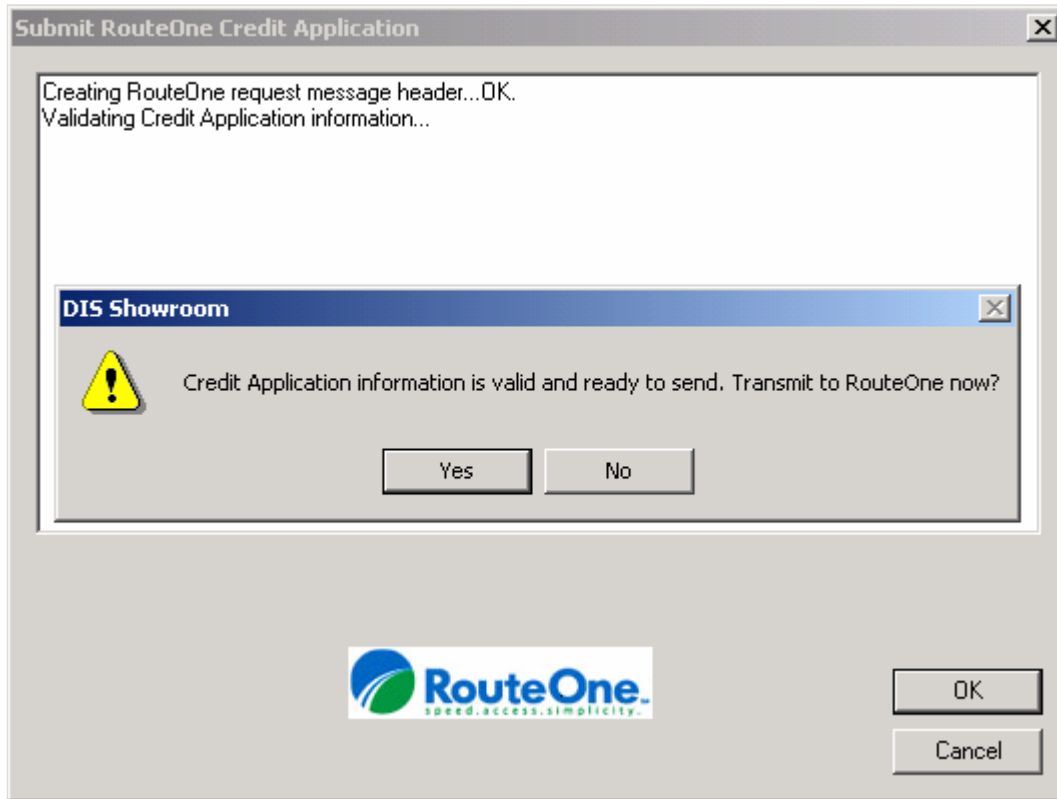
The screenshot shows a software window titled "Mr. George T Benson I". It is divided into several sections for data entry:

- Contract Details:** Salesperson (Larry MacDonald), Category (Retail), Stock Number (TEST11), Year/Model (2006 FREESTAR), Contract Date (11/14/2006), Delivery Date (11/14/2006), Bank (Finance Bank), and Term (60).
- Price Details:** Selling Price (34,101.00), Trade (4,101.00), Payment Deposit (1,201.00), Cash Down (1,301.00), Rebate (Total: 1,401.00), Lien Payout (1,101.00), Discount (1,001.00), and Payment (872.42).
- Trades:** 1997 ESCORT
- Co Buyers:** Mrs. Freida J Monroe Esq
- Other:** A "No Followup" checkbox and "Hold" and "Closed" buttons.

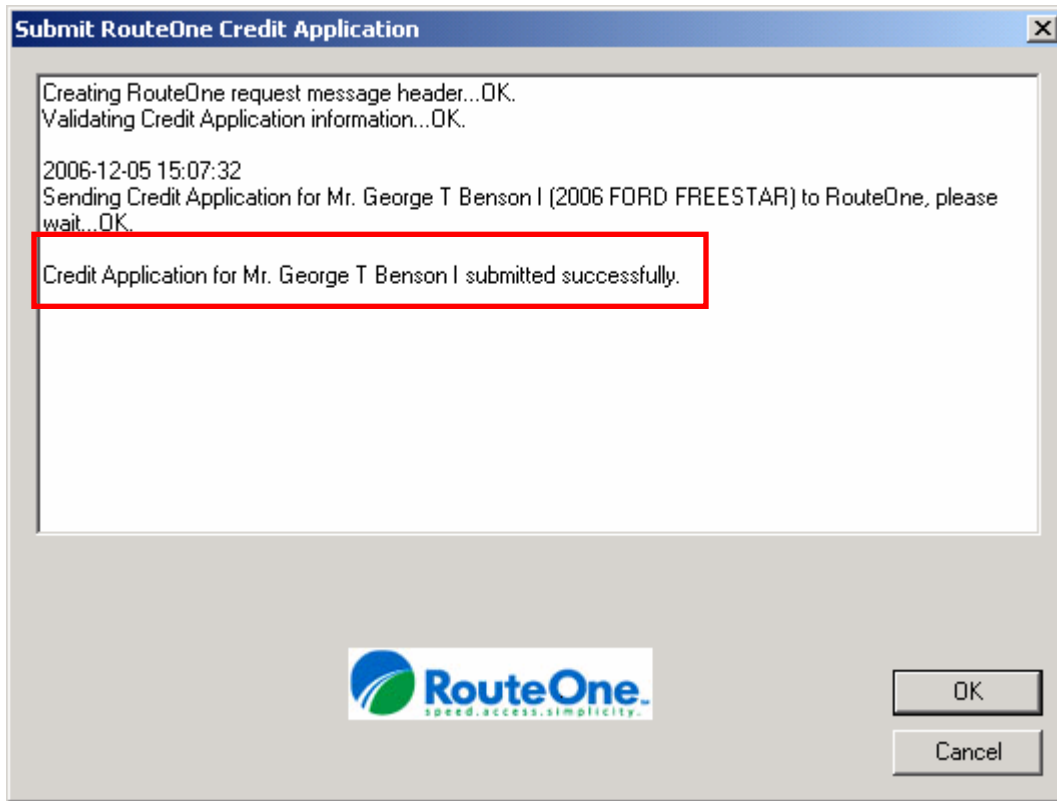
2. To send your deal information to RouteOne, select **Options**. Click on **RouteOne**. Click on **Send Credit Application**.



3. DIS Showroom will let you know if your deal information is correct and valid. If it is not correct or invalid then DIS Showroom will let you know what information needs to be modified. Click 'Yes' to transmit the credit application to RouteOne.




4. DIS Showroom will let you know if the application was submitted successfully.

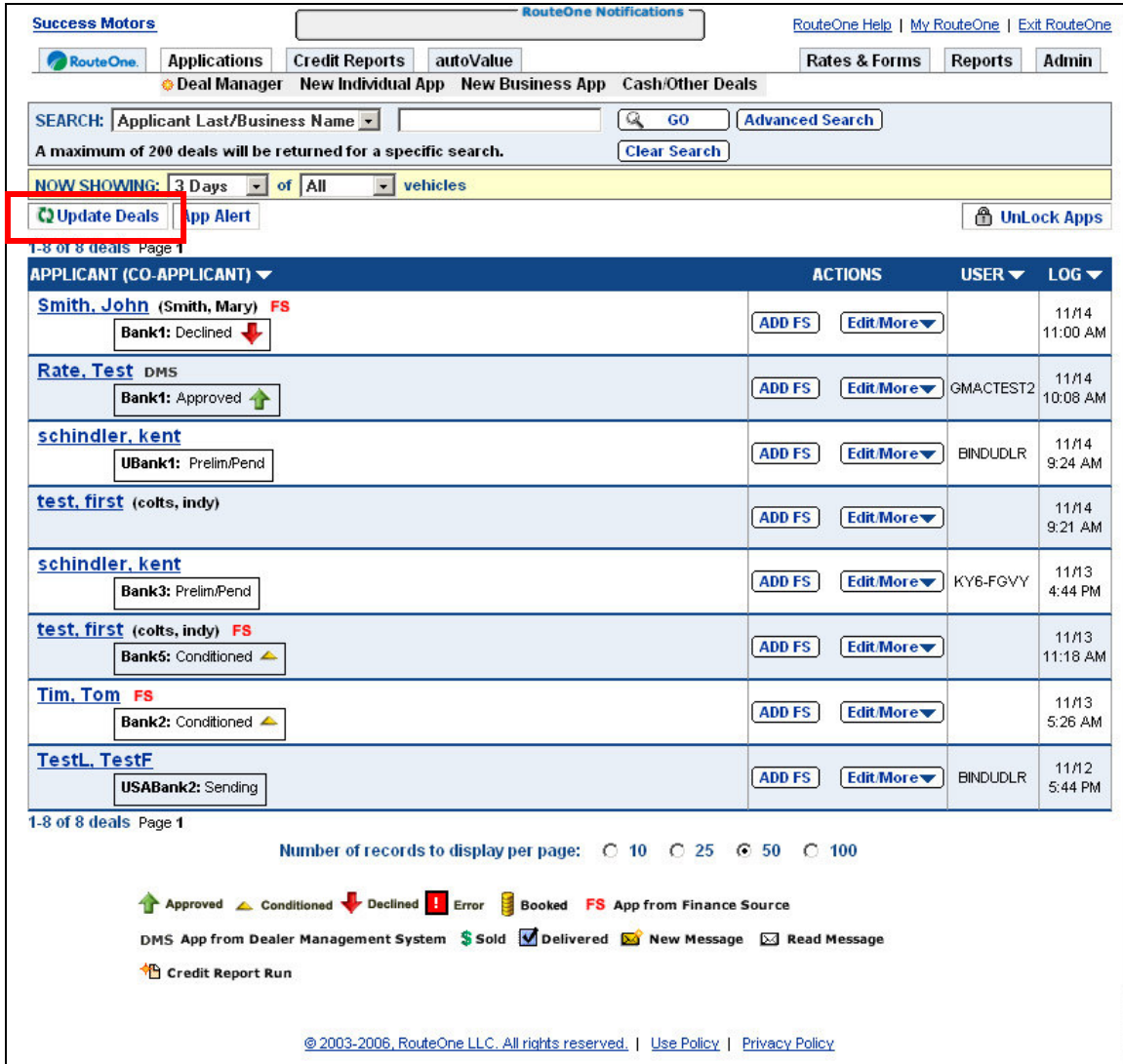


5. Click OK to exit the screen.

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  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: Applications, Credit Reports, autoValue, Rates & Forms, Reports, and Admin. Below these are sub-tabs: Deal Manager, New Individual App, New Business App, and Cash/Other Deals. A search bar is present with a dropdown menu for 'Applicant Last/Business Name' and a 'GO' button. Below the search bar, there is a 'NOW SHOWING' section with a dropdown for '3 Days' and a dropdown for 'All' vehicles. A red box highlights the 'Update Deals' button in this section. Below the search and filters, there is a table of deals. The table has columns for 'APPLICANT (CO-APPLICANT)', 'ACTIONS', 'USER', and 'LOG'. The first row is for 'Smith, John (Smith, Mary) FS' with a 'Bank1: Declined' status and a red arrow icon. The second row is for 'Rate, Test DMS' with a 'Bank1: Approved' status and a green arrow icon. The third row is for 'schindler, kent' with a 'UBank1: Prelim/Pend' status and a yellow arrow icon. The fourth row is for 'test, first (colts, indy)' with a 'Bank5: Conditioned' status and a yellow arrow icon. The fifth row is for 'schindler, kent' with a 'Bank3: Prelim/Pend' status and a yellow arrow icon. The sixth row is for 'test, first (colts, indy) FS' with a 'Bank2: Conditioned' status and a yellow arrow icon. The seventh row is for 'Tim, Tom FS' with a 'USABank2: Sending' status and a yellow arrow icon. The eighth row is for 'TestL, TestF' with a 'Bank1: Declined' status and a red arrow icon. Below the table, there is a legend for deal statuses: Approved (green arrow), Conditioned (yellow arrow), Declined (red arrow), Error (red exclamation mark), Booked (yellow book icon), FS App from Finance Source (FS), DMS App from Dealer Management System (DMS), Sold (green dollar sign), Delivered (checkbox), New Message (envelope), Read Message (envelope with check), and Credit Report Run (document with check). At the bottom, there is a copyright notice: © 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 in DIS Showroom 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.**

Exporting Deals from RouteOne to DIS Showroom

The RouteOne DIS Showroom integration also allows you to export an application and Finance Source decision from RouteOne to your DIS Showroom system. All deals that have been imported to the RouteOne system from DIS Showroom will update the same deal number in DIS Showroom upon exporting the deal from RouteOne.

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 displays the RouteOne Deal Manager interface. At the top, there are navigation tabs for 'Applications', 'Credit Reports', and 'autoValue'. Below this is a search bar with the text 'Applicant Last/Business Name' and a 'GO' button. A yellow banner indicates 'NOW SHOWING: 3 Days of All vehicles'. The main area is a table with columns for 'APPLICANT (CO-APPLICANT)', 'ACTIONS', 'USER', and 'LOG'. The table lists several deals, including 'Smith, John (Smith, Mary) FS' with a 'Bank1: Declined' status, 'Rate, Test DMS' with 'Bank1: Approved', and 'schindler, kent' with 'UBank1: Prelim/Pend'. A context menu is open over the 'Edit More' button for the 'Smith, John' deal, with the option 'Export Application to DMS' highlighted in a red box. Other options in the menu include 'Edit this Application', 'Remove Co-Applicant', 'Swap Applicant/Co-Applicant', 'View/Print Finance Source Decision', 'View/Print this Application', 'Credit Reports', 'Text Messages', 'Show all Copies of this App', and 'Copy this Application'. At the bottom, there is a legend for deal statuses and a copyright notice: '© 2003-2006, RouteOne LLC. All rights reserved. | Use Policy | Privacy Policy'.

APPLICANT (CO-APPLICANT)	ACTIONS	USER	LOG
Smith, John (Smith, Mary) FS Bank1: Declined ↓	ADD FS Edit More		11/14 11:00 AM
Rate, Test DMS Bank1: Approved ↑		GMACTEST2	11/14 10:08 AM
schindler, kent UBank1: Prelim/Pend		BINDUDLR	11/14 9:24 AM
test, first (colts, indy)			11/14 9:21 AM
schindler, kent Bank3: Prelim/Pend		KY6-FGVY	11/13 4:44 PM
test, first (colts, indy) FS Bank5: Conditioned ▲	ADD FS Edit More		11/13 11:18 AM
Tim, Tom FS Bank2: Conditioned ▲	ADD FS Edit More		11/13 5:26 AM
TestL, TestF USABank2: Sending	ADD FS Edit More	BINDUDLR	11/12 5:44 PM

2. A RouteOne **Export Options Screen** will display.

DMS Export
LAMB, JOHN
 Vehicle: NEW 2004 SPECIAL COUPE Co-Applicant: CRAFT, JULIEX
 Transaction Type: Retail
 Amount Financed: \$24901

Export Application

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

Export Application & Finance Source Information

3. Select one of the following:

- **Export Application Only:** Selecting this option will allow you to export data entered in the RouteOne application (excluding any credit decision) to the DIS Showroom system. If you selected **Export Application Only**, continue the export process by clicking the button.
- **Export Application and Credit Decision:** Selecting this option will export data entered in the RouteOne application and select credit decision information to your DIS Showroom system.

DMS Export
LAMB, JOHN
 Vehicle: NEW 2004 SPECIAL COUPE Applicant: CRAFT, JULIEX
 Transaction Type: Retail
 Amount Financed: \$24901

Export Application

Export Application & Finance Source Information

DECISION	USERNAME	EXPORT	TIME OF EXPORT
FINANCE SOURCE 1			
<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			
FINANCE SOURCE 2			
<input type="radio"/> APPROVED - 01/12/2005 - 8:19 AM			
<input type="radio"/> PRELIMINARY - 01/12/2005 - 8:12 AM			

If you selected **Export Application & Finance Source Information**, 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 Showroom system.

Locating Exported Deals in DIS Showroom

To locate a deal exported from RouteOne to your DIS Showroom system, open the customer's deal.

The screenshot shows a software window titled "Ted's Adventures" with the following fields and values:

Contract Details		Price Details	
Salesperson	Fred Budinsky	Selling Price	25,481.00
Category	Retail	Trade	2,420.00
Stock Number	TEST18	Payment Deposit	610.00
Year/Model	2001 ESCAPE	Cash Down	1,620.00
Contract Date	11/16/2006	Rebate	Total: 630.00
Delivery Date	11/16/2006	Lien Payout	549.00
Bank	Finance Bank	Discount	345.00
Term	60	Payment	612.14

Additional fields and controls:

- Trades: 1999 F250
- Co Buyers: Ms. Betty B Smith Jr
- Buttons: Hold, Closed, Scd
- Checkbox: No Followup

Once you are in the deal, go to Options, Route One, View Application Status.

The screenshot shows a software window titled "RouteOne Credit Application Summary". It contains two main sections: "Submissions" and "Decisions".

Submissions Table:

Doc. ID	Type	Created On	Result	RC
43	New	2006-11-17 08:13:16	Application submitted successfully.	0
46	Modified	2006-11-21 09:34:11	Application submitted successfully.	0

Decisions Table:

RouteOne Doc. ID	Status	Submitted On	Decision On	Received On
CIS-1-DA3FEB8703B7EE	Denied	2006-11-22 18:00:12	2006-11-22 18:01:16	2006-12-04 1

Additional UI elements include an "OK" button at the top right, a "Show FILog" checkbox, and a "View Detail" button at the bottom right.

The RouteOne Credit Application Summary screen shows you the number of times you submitted this deal to RouteOne and a summary of the decisions. To view the detail of a decision, double-click on the decision or select the decision and click View Detail.

RouteOne Credit Application Decision [X]

RouteOne Doc. ID: Status:

Type of Financing: Analyst:

Finance Company: Tier: FICO Score:

Financing		Vehicle	
Documentation Fee	<input type="text"/>	Cash Down + Deposit	<input type="text" value="2,230.00"/>
Reg./Vendor Fee	<input type="text"/>	Security Deposit	<input type="text"/>
Admin Fee	<input type="text"/>	Net Trade In	<input type="text" value="1,871.00"/>
License Fee	<input type="text"/>	Rebate	<input type="text" value="630.00"/>
All Other Fees	<input type="text"/>	Other Credits	<input type="text"/>
Disability Premium	<input type="text" value="1,653.00"/>	Balloon	<input type="text" value="7,104.00"/>
Life Premium	<input type="text" value="1,396.00"/>	Gross Cap. Cost	<input type="text" value="45,392.00"/>
Ext. Warr./Other Insur.	<input type="text" value="4,874.00"/>	Net Cap. Cost	<input type="text"/>
Service Contract	<input type="text"/>	Financed Amount	<input type="text" value="3.00"/>
Other Costs	<input type="text"/>		
PST	<input type="text"/>	GST	<input type="text"/>

Monthly Payment Details

Annual Rate	<input type="text"/>	Term	<input type="text" value="10"/>	Amortization	<input type="text" value="72"/>
Buy Rate	<input type="text"/>	First Pmt On	<input type="text"/>	Payment	<input type="text" value="3.00"/>
Money Factor	<input type="text" value="1.0"/>	# of Pmts	<input type="text"/>	Final Pmt	<input type="text"/>

Notes / Comments

Type	Text
Approval Condition	Stipulation1
Approval Condition	Stipulation3
Approval Condition	Stipulation2
Decision Comment	DecisionComments1
Decision Comment	DecisionComments2
Decline Reason	ConditionRejectionText2

The detail screen gives you all the details of the decision and lists any conditions on the approval.

Please note that this screen does not show the deal figures the same as they are entered in DIS Showroom. This is due to multiple fields in DIS Showroom going to a single field in RouteOne.

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 DIS Showroom 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 your DIS Showroom or RouteOne system. As a RouteOne DIS Showroom integrated dealer you have access to the following reports:

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

RouteOne Help | Reports Main Menu | Exit

Dealer Decision Analysis (Time & Mix)

Dealer: Success Motors - USA

Finance Source: All
 Date Range 1: 07/21/2006 to 07/21/2006
 Date Range 2:
 New/Used/Demo: All
 Transaction Type: All

Run On 08/03/2006
 Run By Manavalan, J.

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 Finance Sources First | Previous | Next | Last
 Declined 07/21/2006 to 07/21/2006

FMCTst - All Decisions - (10 records returned)

Date	Customer Name	Veh. Make	Veh. Model	Veh. Year	H.U.D.	Trans. Type	Decision Time	Term	Payment	Advance %	Finance Balance	Buy Rate %	Cust. Rate %	Appl. Source	Decision Type
07/21/2006	John, Smith	Ford	Fusion	2006	New	Retail	1h 10m 25s	36	\$550	93	\$18,500	7.00	8.00	RouteOne	Approved
07/21/2006	George, Johnson	Ford	Fusion	2006	New	Retail	1h 9m 40s	36	\$550	93	\$18,500	7.00	8.00	RouteOne	Approved
07/21/2006	Joseph, Mathew	Ford	Fusion	2006	New	Retail	1h 8m 8s	36	\$550	93	\$18,500	7.00	8.50	RouteOne	Approved
07/21/2006	Ken, Nelson	Ford	Fusion	2006	New	Retail	1h 7m 36s	36	\$550	93	\$18,500	7.00	8.50	RouteOne	Conditioned
07/21/2006	Paul, Stanard	Ford	Fusion	2006	New	Retail	1h 6m 51s	36	\$550	93	\$18,500	7.00	9.00	RouteOne	Conditioned
07/21/2006	Greg, Swanson	Ford	Fusion	2006	New	Retail	13m 17s	36	\$550	93	\$18,500	7.00	9.50	RouteOne	Conditioned
07/21/2006	Rich, Hamilton	Ford	Fusion	2006	New	Retail	1h 6m 1s	36	\$550	93	\$18,500	7.00	9.50	RouteOne	Conditioned
07/21/2006	Smith, Adam	Ford	Fusion	2006	New	Retail	12m 29s	36	\$550	93	\$18,500	7.00	9.50	RouteOne	Declined
07/21/2006	Johnson, Kevin	Ford	Fusion	2006	New	Retail	11m 43s	36	\$550	93	\$18,500	7.00	9.50	RouteOne	Declined
07/21/2006	Peter, Simon	Ford	Fusion	2006	New	Retail	9m 23s	36	\$550	93	\$18,500	7.00	9.50	RouteOne	Declined

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- 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").

RouteOne Help | Reports Main Menu | Exit

Dealer Time Sales Analysis (TSA)

Dealer: Geweke Ford - USA

Finance Source: All
 Date Range 1: 07/01/2006 to 08/01/2006
 Date Range 2:
 New/Used/Demo: All
 Transaction Type: All
 Vehicle Year: All
 Vehicle Make: All
 Vehicle Model: All

Run On 08/03/2006
 Run By Manavalan, J.

Top
 Finance Sources First | Previous | Next | Last
 Date Range 07/01/2006 to 08/01/2006

FMCTst - (6 records returned)

Date	Customer	Veh. Make	Veh. Model	Veh. Year	H.U.D.	R.L.B
07/21/2006	George, Johnson	FORD	EXPEDITION	2006	New	Lease
07/21/2006	Greg, Swanson	FORD	F-150	2006	New	Retail
07/21/2006	John, Smith	FORD	FUSION	2006	New	Retail
07/21/2006	Joseph, Mathew	FORD	RANGER	2006	New	Balloon
07/21/2006	Ken, Nelson	FORD	TAURUS	2006	New	Retail
07/21/2006	Paul, Stanard	FORD	ESCAPE	2006	New	Retail

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- 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.

RouteOne [Help](#) | [Reports](#) | [Main Menu](#) | [Exit](#)

Dealer Finance and Insurance Log

Dealer: Success Motors - USA

Date Range: 08/01/2006 to 08/29/2006
 Report On: Dealer/Dealer Group
 Additional Summary: Finance Source
 Include Transaction Detail: Yes


 Run On: 09/06/2006
 Run By: Manavalan, J.

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DSP Finance and Insurance Load Exceptions: 0

F&I Manager Count: 15
Salesperson Count: 69

	Total				New				Used						
	Total (\$)	Units	Pen%	Avg (\$)	PVR (\$)	Total (\$)	Units	Pen%	Avg (\$)	PVR (\$)	Total (\$)	Units	Pen%	Avg (\$)	PVR (\$)
Sales Gross	161,769.14	593		272.90		49,853.60	139		357.22		112,115.54	454		246.95	
Finance Reserve	97,824.90	185	31.2	526.76	164.97	32,209.33	82	59.0	392.60	231.73	65,614.57	103	22.7	637.04	144.53
Life Insurance	738.14	4	2.2	184.54	1.24	83.38	1	1.2	83.38	0.60	654.76	3	2.9	218.25	1.44
Disability Insurance	1,740.91	5	2.7	348.18	2.94						1,740.91	5	4.9	348.18	3.83
CI Total	2,479.05	9	4.9	275.45	4.18	83.38	1	1.2	83.38	0.60	2,395.67	8	7.8	299.46	5.28
GAP	31,910.00	68	36.8	469.26	53.81	7,125.00	15	18.3	475.00	51.26	24,785.00	53	51.5	467.64	54.59
Service Contract	32,720.00	61	10.3	536.39	55.18	10,471.00	22	15.8	475.95	75.33	22,249.00	39	8.6	570.49	49.01
GAP/SC Total	64,630.00	129		501.01	108.99	17,596.00	37		475.57	126.59	47,034.00	92		511.24	103.60
Accessories		31	5.2				23	16.5				8	1.8		
Plan		13	2.2				9	6.5				4	0.9		
Maintenance		4	0.7				4	2.9							
Road Hazard		3	0.5									3	0.7		
Total Other Products															
F&I Total	164,933.95				278.13	49,889.31			358.92		115,044.64			253.40	

Lender	Units	%
CAB WEST LLC	566	96.8
FORD MOTOR CREDIT CO.	4	0.7
DCFS TRUST	3	0.5
Total Number of Deals / Sales	583	100.0

Lender summary includes deals with turnover indicator = N

All summary calculations exclude deals with turnover indicator = N

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You can set various parameters and timeframes to help you better compare and analyze information. You can also break the report down by F&I Manager, Salesperson, Transaction Type, and more. Additionally, you can view, save, and print reports in a .CSV (comma separated value) file format for use with spreadsheet programs such as Microsoft® Excel.