

## The Benefits of Integration

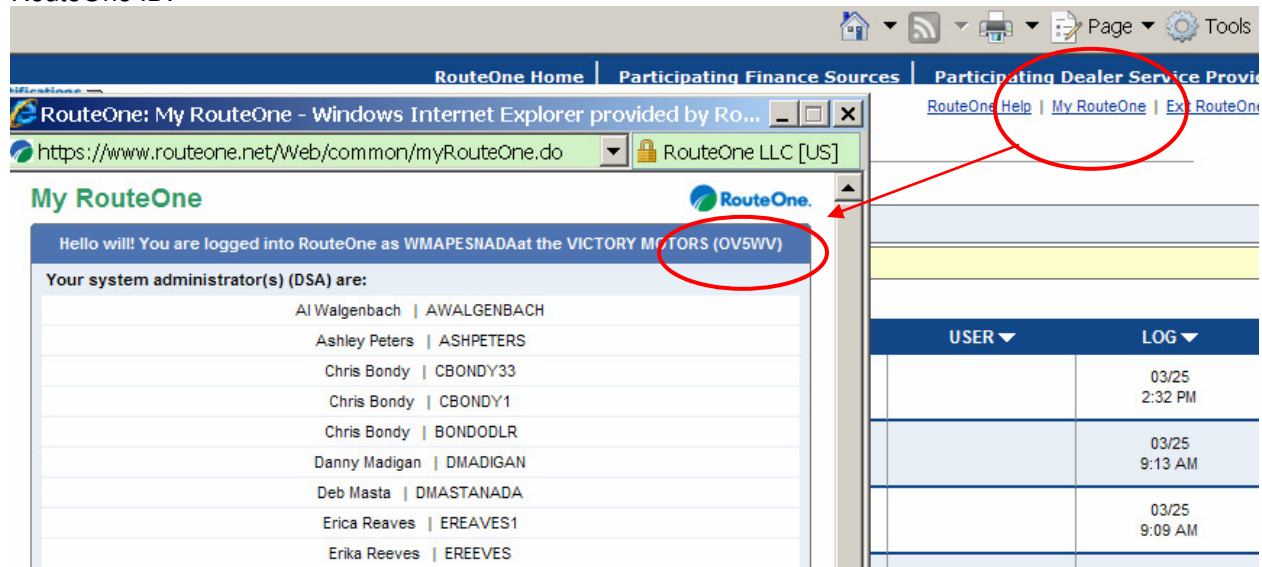
RouteOne's innovative Dealer Management System (DMS) integration solution enables an exchange of credit application information between RouteOne and your DealerCentric system. Fields on the RouteOne credit application to be populated with information obtained electronically from your DealerCentric system,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

Key features of this guide:

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

## Integration Setup

In the upper right hand corner of the RouteOne screen, click on the 'My RouteOne' button to obtain your RouteOne ID.



The screenshot shows the RouteOne 'My RouteOne' interface. At the top right, there are navigation links: 'RouteOne Home', 'Participating Finance Sources', and 'Participating Dealer Service Provider'. Below these is a 'My RouteOne' button circled in red. The main content area shows a greeting: 'Hello will! You are logged into RouteOne as WMAPE SNADA at the VICTORY MOTORS (OV5WV)'. Below this is a table of system administrators (DSA) with columns for name and ID. A second red circle highlights the user information at the top of this table.

USER	LOG
	03/25 2:32 PM
	03/25 9:13 AM
	03/25 9:09 AM

Setting up integration with RouteOne is quick and easy.

1. From your DealerCentric system click on the Admin tab then click on the Integration tab just below Admin.
2. Now click on the RouteOne tab.
3. In the box located in the center of the screen input your Route One Dealer ID – **IN CAPITAL LETTERS**
4. Click on **Save Settings**

Most integration requests are processed as they arrive, but please allow one business day for processing of new integrations.

Example of Standard Platform:

The screenshot shows the DealerCentric Admin interface. The top navigation bar includes 'Applications', 'Admin', 'F.A.Q.', 'Support', and 'Logout'. Below this, a red bar contains 'Users' and 'Integration'. A secondary blue bar has 'C.R.M.', 'Call Back Service', and 'Route One'. The main content area displays 'DCSDealer: (949)713-9440' and 'Initial Admin' with a 'Start as Logon Page' checkbox. The title is 'Route One Integration Request'. The text reads: 'If you are a Route One Participating Dealer and elect to export consumer credit applications from DealerCentric to Route One, input your Route One Dealer ID below and click the save settings button to activate this service.' Below this is a text input field for 'Route One Dealer ID:' followed by a red 'Save Settings' button. A note at the bottom states: 'If you are not a Route One Participating Dealer, you may download the Dealer Participation Agreement (routeonedpa.pdf) and contact your Route One Representative for execution.'

Activation process is the same; however the Preferred Platform offers more functionality.

Example of Preferred Platform:

This screenshot is similar to the first one but shows a different navigation structure. The top bar includes 'Apps/Leads', 'Admin', 'Reports', 'Inventory', 'Support', and 'Logout'. The red bar below contains 'Users', 'Integration', 'Credit Filters', and 'Email Templates'. The blue bar has 'C.R.M.', 'Call Back Service', and 'Route One'. The main content area shows 'DCSDealer: (949)713-9440' and 'Start as Logon Page' checkbox. The title is 'Route One Integration Request'. The text reads: 'If you are a Route One Participating Dealer and elect to export consumer credit applications from DealerCentric to Route One, input your Route One Dealer ID below and click the save settings button to activate this service. By clicking on save settings you agree to accept the payment terms listed below.' Below this is a text input field for 'Route One Dealer ID:' followed by a red 'Save Settings' button. A note at the bottom states: 'If you are not a Route One Participating Dealer, you may download the Dealer Participation Agreement (routeonedpa.pdf) and contact your Route One Representative for execution.'

## Sending Applications to RouteOne

You need to send each application, individually, to RouteOne. There are a couple of screens that will allow you to send an application to RouteOne.

### **From Apps/Leads tab:**

1. Click on a customer name.
2. Click on the Application tab (in blue)
3. Click on the 'Send application to RouteOne' located on the right side of the application.

The screenshot shows the DealerCentric application interface. At the top, there are navigation tabs: 'Apps/Leads' (highlighted in red), 'Admin', 'Reports', 'Inventory', 'Support', and 'Logout'. Below this is a sub-menu with 'Apps/Leads', 'New Quick App', and 'New Application'. A secondary menu includes 'Lead Details', 'Email', 'Application' (highlighted), 'Credit', 'Inventory', 'Desking', 'Finance', 'Lead History', and 'Archive Lead'. The user is identified as 'DCSDealer: (949)713-9440 Initial Admin' with a 'Start as Logon Page' checkbox.

The main form is divided into two sections: 'Main Applicant' and 'Auto Info'. The 'Main Applicant' section includes fields for Title, First Name (Harvey), Last Name (Homeloan), Suffix, Drivers Lic. #, Social Sec. # (000-64-0183), Birth Date (Mar 11 1965), and Home Phone # (999-999-9999). The 'Auto Info' section includes a 'Residence' section with fields for Address Line 1 (31991 Dove Canyon Dr), Address Line 2, City (Trabuco Canyon), and State (California). A red arrow points to a 'Click here' link next to the Address Line 1 field.

On the right side of the form, there are three action buttons: 'Add Co-Applicant to Application', 'Add Co-Signer to Application', and 'Send Application to RouteOne' (highlighted in yellow). Below these are 'Print Application' and 'Policy Links' (Privacy Policy, Security Policy, Federal Notice, Disclaimer).

## Applications Exported to RouteOne

Application push from this page is the same for Standard and Preferred dealers, preferred platform has more functionality.

Once you have clicked on the **Send Application to RouteOne**; the following response will be displayed at the top of the screen:

This screenshot shows the same DealerCentric application form as above, but with a green notification banner at the top. The banner contains a document icon and the text 'The Application has been exported to Route One.' A red arrow points to the banner from the left. Below the banner, the form fields are the same, but the 'Residence' section now includes a checkbox labeled 'Same as Main-Applicant's' which is currently unchecked. The action buttons on the right are now 'Add Co-Applicant to Application', 'Add Co-Signer to Application', and 'Resend Application to RouteOne'. The 'Print Application' button remains.

## Sending Applications to RouteOne (cont.)

**From Finance Tab: (Only Available on Preferred Platform.)**

1. Click on the Apps/Leads tab
2. Click on a customer name.
3. Click on the Finance tab (in Blue)
4. At the bottom of the page, under Export, you will find RouteOne; click to send

[Apps/Leads](#) | [Admin](#) | [Reports](#) | [Inventory](#) | [Support](#) | |

[Apps/Leads](#) | [New Quick App](#) | [New Application](#)

[Lead Details](#) | [Email](#) | [Application](#) | [Credit](#) | [Inventory](#) | [Desking](#) | [Finance](#) | [Lead History](#) | [Archive Lead](#)

Initial Admin  Start as Logon Page

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Prospect: Kent Aaron

Credit Profile Summary				Financial Status	
<a href="#">Modify Purchase</a>				<a href="#">View Finance History</a>	
Quick App Filters: <b>Passed</b>	Credit Score: -1	Finance Status: None Found			
Credit History: 0M	High Credit: \$0.00	Comments: None Found			
Rent/Own: Rent	Residence History: 6Y/3M	<a href="#">Change Finance Status</a>			
Employment History: 7Y/1M	DTI: 16.03%	<a href="#">Send Application to Archive</a>			
PTI: 5.03%	LTV: 109.55%				
Sales Price: \$22,000.00	Term: 60 Months				
Total Down: \$1,000.00	APR Rate: 11.00				
Amount Financed: \$23,005.00	Book: \$21,000.00				
Payment: \$502.57	Miles: 12,000				

Lenders	Tier 1	2	3	4	5	6
- Dealership Filters -						x

Export		Date Sent
Route One	<a href="#">Click to send</a>	
	<a href="#">Send</a>	

## Applications Exported to RouteOne

Once you have clicked on the Send Application to RouteOne; the following response will be displayed at the top of the screen and the history can be viewed below:

**The Application has been exported to RouteOne.**

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Prospect: Harvey Homeloan


Credit Profile Summary				Financial Status	
<a href="#">Create Deal</a>				<a href="#">View Finance History</a>	
Quick App Filters: <b>Passed</b>	Credit Score: 729	Finance Status: None Found			
Credit History: 13Y/6M	High Credit: \$93,456	Comments: None Found			
Rent/Own: Rent	Residence History: 9Y/5M	<a href="#">Change Finance Status</a>			
Employment History: 7Y/2M	DTI: 0%	<a href="#">Send Application to Archive</a>			
PTI: 0%	LTV: 0%				
Sales Price: N/A	Term: N/A				

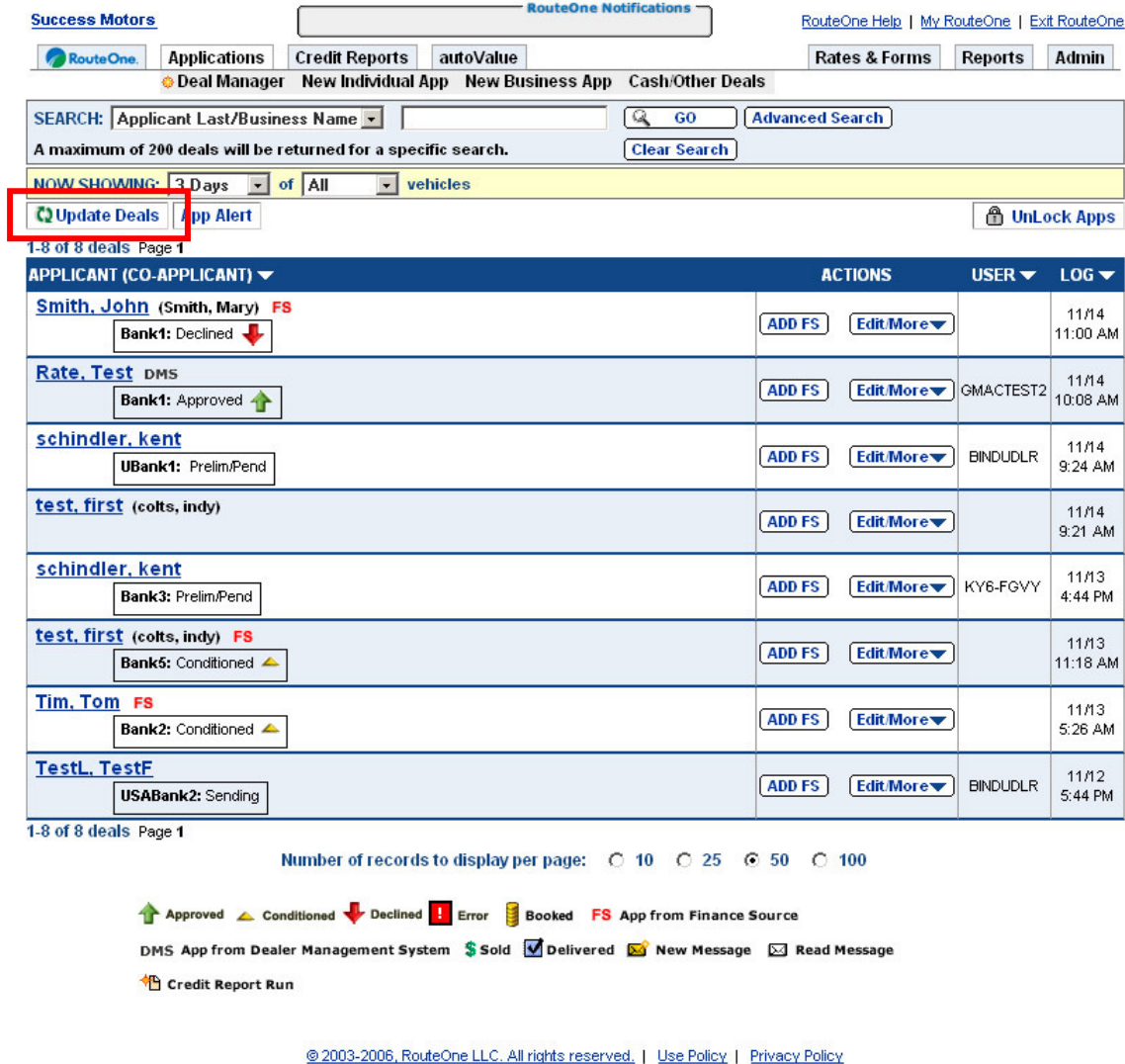
**History:**

Export		Date Sent
RouteOne	Resend <a href="#">Export Successful</a>	3/16 11:33 AM

## 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 denoted with the **DMS** icon next to the primary applicant's name.




The screenshot shows the RouteOne Deal Manager interface. At the top, there are navigation tabs for 'Success Motors', 'RouteOne', 'Applications', 'Credit Reports', 'autoValue', 'Rates & Forms', 'Reports', and 'Admin'. Below these are options for 'Deal Manager', 'New Individual App', 'New Business App', and 'Cash/Other Deals'. A search bar is present with a dropdown for 'Applicant Last/Business Name' and a 'GO' button. Below the search bar, there are filters for 'NOW SHOWING: 3 Days of All vehicles' and buttons for 'Update Deals' (highlighted with a red box), 'App Alert', and 'UnLock Apps'. The main content is a table with columns for 'APPLICANT (CO-APPLICANT)', 'ACTIONS', 'USER', and 'LOG'. The table lists several deals with their respective bank statuses and actions.

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 ↑	ADD FS Edit More	GMACTEST2	11/14 10:08 AM
schindler, kent UBank1: Prelim/Pend	ADD FS Edit More	BINDUDLR	11/14 9:24 AM
test, first (colts, indy)	ADD FS Edit More		11/14 9:21 AM
schindler, kent Bank3: Prelim/Pend	ADD FS Edit More	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

Below the table, there are pagination controls: '1-8 of 8 deals Page 1' and 'Number of records to display per page: 10 25 50 100'. A legend at the bottom identifies various status icons: Approved (green up arrow), Conditioned (yellow triangle), Declined (red down arrow), Error (red square), Booked (yellow book icon), FS (red square), App from Finance Source (blue square), DMS App from Dealer Management System (blue square), Sold (green dollar sign), Delivered (blue checkmark), New Message (yellow envelope), Read Message (grey envelope), and Credit Report Run (orange document icon).

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## Submitting Imported Deals to a Finance Source

To submit an imported deal to a Finance Source, simply click on the  button, or primary applicant's name in the Deal Manager. You will be taken through the RouteOne application submission process. Data entered in DealerCentric 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.