



## Integration Guide

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

### Importing Deals from MaximTrak to RouteOne:

Importing a customer application from your MAXIM AUTOMOTIVE system is quick and easy!

1. From MaximTrak, go to the Customer Application Home Page.

The screenshot shows the MaximTrak F&I Portal interface. At the top, there are navigation tabs for 'F&I Home', 'Dealer Home', 'Products', and 'Reports'. Below this is a search form titled 'Search for a RouteOne Credit Application' with fields for 'Cust Last Name', 'Stock #', and 'Deal #'. A 'Submit' button is present, along with 'Recent Deals' filters for 50, 100, and MTD. Below the search form is a 'Create New RouteOne Credit Application' button. At the bottom, there are two tabs: 'F&I DEALS' and 'RouteOne CREDIT APPLICATION'. A red arrow points to the 'RouteOne CREDIT APPLICATION' tab, which is highlighted in a yellow box with the text 'Select the RouteOne Credit Application Tab in MaximTrak'. Below the tabs is a 'Customer Search Results' table with columns for Status, Customer, Vehicle, Deal #, Deal Status, Date Submitted, Submitted By, and Activity.

Status	Customer	Vehicle	Deal #	Deal Status	Date Submitted	Submitted By	Activity
Submission Failed	PATRICK OROURKE	2005 CHEVROLET	28878	Pending Customer	10/10/2006 10:27:56 AM	Jim Maxim Jr	1
Submission Failed	John Runyan	2004 CHRYSLER	28888	Pending Customer	10/4/2006 2:05:54 PM	Jim Maxim Jr	1
Submission Failed	Joe Roberts	2004 CHRYSLER	28888	Closed Customer	10/4/2006 12:54:08 PM	Jim Maxim Jr	1
Submission Failed	SUSAN CARLSON	2006 FORD	28875	Pending Customer	9/22/2006 1:17:23 PM	Jim Maxim Jr	2
Submission Failed	JAMES JONES	2006 PONTIAC	28879	Closed Customer	9/20/2006 8:27:21 AM	Unknown	9
Submitted	JOHN SMITH	2006 PONTIAC	28879	Pending Customer	9/11/2006 9:47:18 PM	Unknown	1

- Enter the Deal # from your DMS system and click on the REFRESH button. Enter any other information required (i.e., SSN#, Employment Info, Driver License, etc.)

**MAXIMTRAK** Maximizing F&I Potential

Go to Menu Exit Credit Application

INDIVIDUAL 
  INDIVIDUAL W/ CO-BUYER 
  BUSINESS 
  BUSINESS W/ CO-BUYER

**RETAIL DEAL DETAILS**

Deal #: 28878 Refresh Status: Pending

Structure: Finance Trade-In: \$0.00 Amt. Financed: \$19,308.64 View Products

MSRP: \$0.00 Pay-off: \$0.00 Terms: 72 Ins/Svc/Other: \$2,289.00

Wholesale Invoice: \$0.00 Net Trade-In: \$0.00 Rate: 8.00 % Credit Life: \$0.00

Sales Price: \$15,995.00 Tax: \$983.89 Pmt: \$349.24 Disability: \$0.00

Title/Lic/Reg Other Fees: \$130.75 Cash Down: \$100.00

Rebate: \$0.00 Total Price: \$16,025.75

**DEAL FEE'S**

Edit	Remove	Fee Name	Amount
<input type="checkbox"/>	<input type="checkbox"/>	DOC FEE	\$55.00
<input type="checkbox"/>	<input type="checkbox"/>	ENCUMB FEE	\$5.00
<input type="checkbox"/>	<input type="checkbox"/>	MESS FEE	\$2.25
<input type="checkbox"/>	<input type="checkbox"/>	REG FEE	\$36.00
<input type="checkbox"/>	<input type="checkbox"/>	TEMP FEE	\$10.00
<input type="checkbox"/>	<input type="checkbox"/>	TITLE FEE	\$22.50
Fee Total:			\$130.75

**VEHICLE DETAILS** **TRADE-IN VEHICLE DETAILS**

- Click on the SUBMIT button to send the customer application from MaximTrak to RouteOne.

Other Income Source:

Support Payment Amount:

**FINANCIAL INFORMATION**

Bank Name:  Bank Account Type: Unknown

Bankruptcy:  Yes  No Date: / /  (\*\*/\*\*\*\*)

Repossession:  Yes  No Date: / /  (\*\*/\*\*\*\*)

Creditor Name #1:  Creditor Name #2:

Creditor Balance #1: \$0.00 Creditor Balance #2: \$0.00

Creditor Payment #1: \$0.00 Creditor Payment #2: \$0.00

**Previous Auto Loan**

Financing Company:  Loan Acct #:

Loan Balance: \$0.00 Monthly Payment: \$0.00

**ADDITIONAL CONTRACT INFORMATION**

Application Language: English

Pre-Approval:  Yes  No

Pre-Approval Type:

Offering Type: NewOffering

Sales Order Number:

Special Programs: CollegeGraduate, Other, MilitarySalesFinance, CustomerOptionPlan, Contac, EmployeeProgram, RepairProgram, ResidualPurchasePlan, CreditLine

Save Submit

For Support Please call 866.742.0750  
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- You can also send the customer application from your Deal Closing Screen to RouteOne. This will also take you to the Customer Application Screen (Step 1 above).

**MAXIMTRAK** Maximizing F&I Potential

Step 1: Customer/Vehicle Info    Step 2: Configure Menu    Step 3: Generate Menu    Step 4: Close Deal



Product Name	Vendor	Price	Gross	Months	Miles	Deductible
<input checked="" type="checkbox"/> GAP Protection	MAXIM AUTOMOTIVE	\$399.00	\$264.00	0		
<input checked="" type="checkbox"/> Mechanical Protection	FORD	\$1,800.00	\$700.00	60	75000	\$100.00
<b>Totals</b>		<b>\$2,299.00</b>	<b>\$964.00</b>			

**Deal Closing Inputs For Deal # 28878**

Buy Rate: 8.000000	Sell Rate: 9.000000	Rate Spread: 3.000000
Vehicle Gross: \$15,995.00	Other Front Gross: \$0.00	Front Gross Total: \$15,995.00
Reserve Gross: \$825.01	Product Gross: \$964.00	Other Back Gross: \$0.00
		Back Gross Total: \$1,789.01
		Deal Gross Total: \$17,784.01


**Deal Summary**

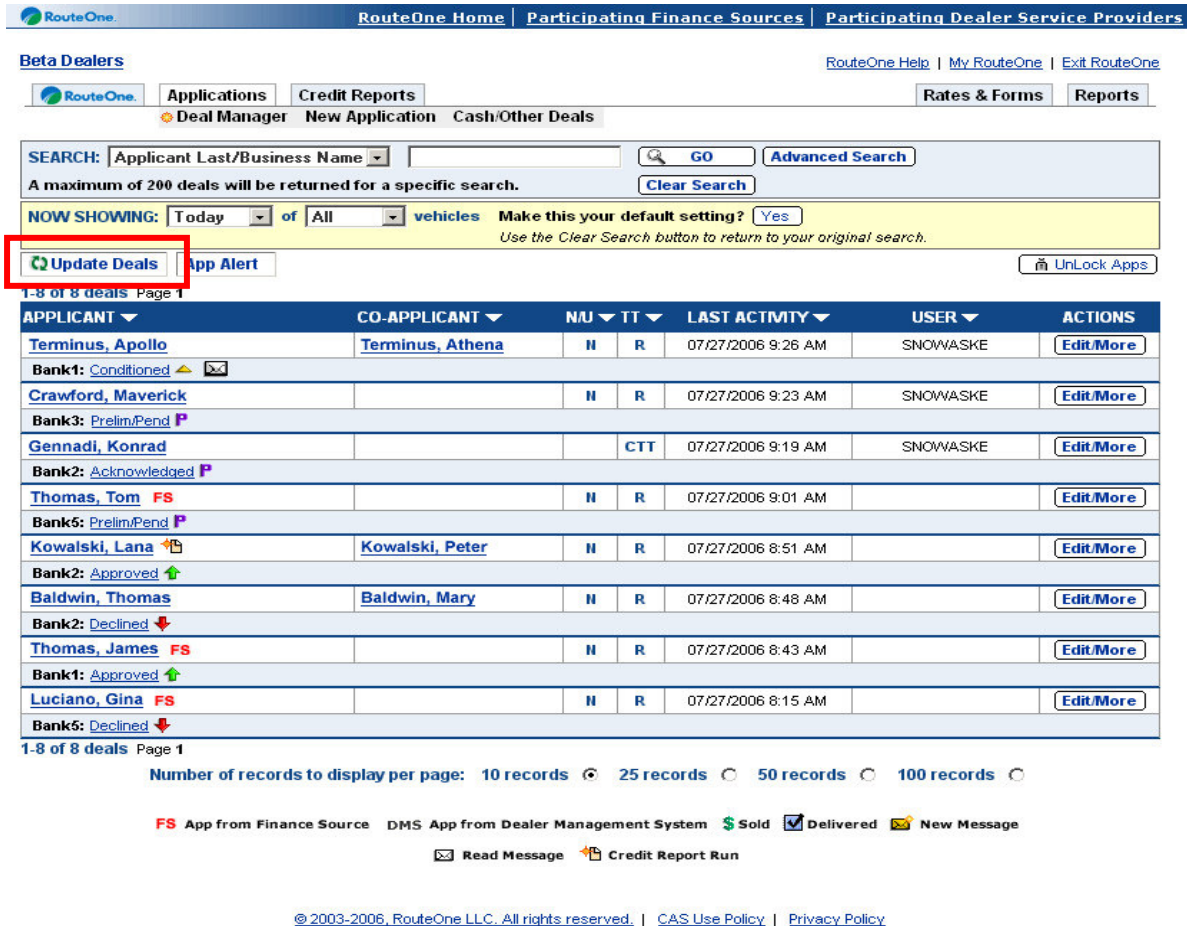
Customer Name: PATRICK OROURKE  
 Year, Make & Model: 2005 CHEVROLET MALIBU  
 Transaction Type: Finance  
 Bank: JPMORGAN CHASE BANK, N.A. (PRIME)  
 Vehicle Sales Price: \$15,995.00  
 Down Payment: \$100.00  
 Trade-In: \$0.00  
 Rebate: \$0.00  
 Trade-In Payoff: \$0.00  
 Fees Other: \$130.75  
 Finance Amount: \$19,308.64  
 Tax Amount: \$983.89  
 APR: 0.090000  
 Term: 72 months  
 Payment Frequency: Monthly  
 Vehicle Only Payment: \$307.22  
 Total A & H Premium: \$0.00  
 A & H Monthly Premium: \$0.00  
 Total Life Premium: \$0.00

Start a RouteOne Credit Application:  

## 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 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 links for "RouteOne Home", "Participating Finance Sources", and "Participating Dealer Service Providers". Below this, there are tabs for "Applications", "Credit Reports", "Rates & Forms", and "Reports". The "Deal Manager" tab is active, and there are sub-tabs for "Deal Manager", "New Application", and "Cash/Other Deals".

A search bar is present with the text "SEARCH: Applicant Last/Business Name" and a "GO" button. Below the search bar, there is a "NOW SHOWING:" section with filters for "Today", "All", and "vehicles". A yellow banner below the filters contains the text "Make this your default setting? Yes" and "Use the Clear Search button to return to your original search.".

The "Update Deals" button is highlighted with a red box. Below the button, there is a table of deals. The table has columns for "APPLICANT", "CO-APPLICANT", "NAU", "TT", "LAST ACTIVITY", "USER", and "ACTIONS". The first row shows "Terminus, Apollo" as the applicant and "Terminus, Athena" as the co-applicant. The "LAST ACTIVITY" column shows "07/27/2006 9:26 AM". The "ACTIONS" column has an "Edit/More" button.

Below the table, there is a legend for various icons: "FS App from Finance Source", "DMS App from Dealer Management System", "\$ Sold", "Delivered", "New Message", "Read Message", and "Credit Report Run".

At the bottom of the page, there is a copyright notice: "© 2003-2006, RouteOne LLC. All rights reserved. | CAS 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 DSP VENDOR 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.