



## The Benefits of Integration

The integration between RouteOne and TME (The Mazda Experience) allows fields on the RouteOne credit application to be populated with information obtained electronically from TME, thereby eliminating duplicate data entry and related errors.

## Importing Deals from TME to RouteOne

Importing a credit application from TME to RouteOne is quick and easy!

1. When you finalize the deal with the customer and you are ready to submit a credit application; click the [Credit Application](#) link in the tools section of the deal worksheet. Depending on the customer type, a dialogue window with the appropriate tab(s) will display. For example, if the customer is a business customer then only the Account tab will display, else if the customer is an individual then only the Buyer and Co-Buyer tabs will display.

The screenshot displays the 'Lease Calculator' and 'Deal Worksheet' sections of the RouteOne software. The 'Lease Calculator' section includes fields for Type (Lease), Lender (MCC), Program (Other Program), Term (24), Interest Rate (8.0%), Total Cash Down (\$1,000.00), and various financial metrics like MSRP (\$27,170.00), Residual Rate (96%), and Total Payment Amount (\$364.73). The 'Deal Worksheet' section shows MSRP (\$26,495.00), Vehicle Selling Price (\$26,495.00), and various adjustments like Accessories (\$479.30), Freight (\$675.00), and Trade In (\$4,000.00). The 'Purchase Total' is calculated as \$30,754.30. The 'Tools' section on the right includes a 'Credit Application' link highlighted in red.

2. Some of the pre-captured deal/customer information will populate in the respective credit application fields. You might need to complete the required part(s) prior to submitting the credit application to RouteOne. When you click on the [Submit Credit Application](#) link; the information you have entered will automatically be transmitted to RouteOne.

**CREDIT APPLICATION PERSONAL INFORMATION** Buyer  Co-Buyer

<b>Buyer's Personal Information</b> Co-Buyer for this Credit Application <input type="radio"/> No <input checked="" type="radio"/> Yes Title <input type="button" value="v"/> No Title <input type="button" value="v"/> First Name Mike <input type="button" value="v"/> MI <input type="button" value="v"/> M Last Name Keaton <input type="button" value="v"/> Suffix JR <input type="button" value="v"/> Preferred Name Mike <input type="button" value="v"/> Birth Date 07/08/1980 <input type="button" value="v"/> Gender <input type="button" value="v"/> Driver Licence # d343143214e <input type="button" value="v"/> Social Insurance # 333-333-333 Language English <input type="button" value="v"/> Customer Type Individual <input type="button" value="v"/>		<b>Buyer's Contact Information</b> Home Phone 613 555-3843 <input type="button" value="v"/> Ext <input type="button" value="v"/> Business Phone 613 555-2143 <input type="button" value="v"/> Ext 6330 Cell 613 555-2992 <input type="button" value="v"/> E-Mail michael.keaton@compuserve.com Preferred Contact Method Home Phone <input type="button" value="v"/>		<b>Tools</b> <input type="button" value="Submit Credit Application"/> <input type="button" value="Print Credit Application"/>          <input type="button" value="Save"/> <input type="button" value="Reset"/> <input type="button" value="Cancel"/>
<b>Buyer's current Address</b> Street Number 123 <input type="button" value="v"/> Number Suffix <input type="button" value="v"/> Unit/Suite/Apt 1203 <input type="button" value="v"/> Street Name maple <input type="button" value="v"/> Street Type Street <input type="button" value="v"/> Street Direction <input type="button" value="v"/> Delivery Mode <input type="button" value="v"/> PO Box/Route Number <input type="button" value="v"/> City Vancouver <input type="button" value="v"/> Prov/State British Co <input type="button" value="v"/> Country Canada <input type="button" value="v"/> Postal/Zip Code 13f 4j6 <input checked="" type="radio"/> Own <input type="radio"/> Rent <input type="radio"/> Other Duration 5 Years 5 Months Reference Name molly Moo <input type="button" value="v"/> Reference Phone 613 555-4545 <input type="button" value="v"/>		<b>Buyer's Previous Address</b> Street Number 405 <input type="button" value="v"/> Number Suffix <input type="button" value="v"/> Unit/Suite/Apt <input type="button" value="v"/> Street Name Grant <input type="button" value="v"/> Street Type Crt <input type="button" value="v"/> Street Direction <input type="button" value="v"/> Delivery Mode <input type="button" value="v"/> PO Box/Route Number <input type="button" value="v"/> City Halifax <input type="button" value="v"/> Prov/State Nova Sco <input type="button" value="v"/> Country Canada <input type="button" value="v"/> Postal/Zip Code N3D4F3 <input type="radio"/> Own <input checked="" type="radio"/> Rent <input type="radio"/> Other Duration 2 Years 1 Months Reference Name Martha Moo <input type="button" value="v"/> Reference Phone 319 555-3444 <input type="button" value="v"/>		

3. If the credit application requires a Co-Buyer, enter the Co-Buyer information the same way you did for the Buyer. If credit co-insurance is sold in the deal then the Co-Buyer name and birth date will populate in the Co-Buyer section.

The Individual Buyer / Co-Buyer credit application pages are:


- Personal Information
- Employment
- Assets
- Liabilities and
- References

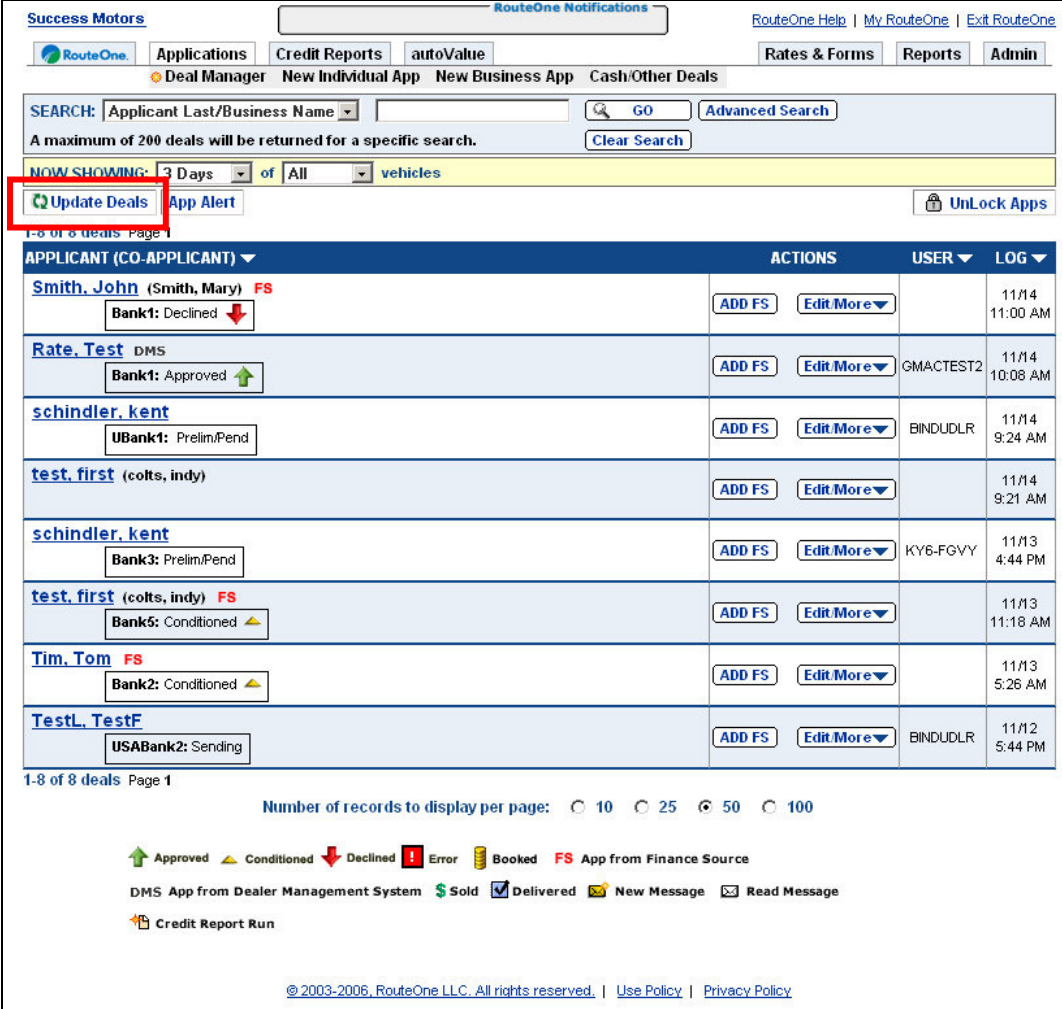
The Account credit application pages are:

- Account Information
- Owners
- Finances and
- Trade References

From those pages, you can save your entries at any time and return later to continue, print the credit application, reset the entries and you can cancel and return to the deal worksheet.

## 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 displays the RouteOne Deal Manager interface. At the top, there are navigation tabs for 'Applications', 'Credit Reports', 'autoValue', 'Rates & Forms', 'Reports', and 'Admin'. Below these is a search bar with a dropdown menu for 'Applicant Last/Business Name', 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' and buttons for 'Update Deals' (highlighted with a red box), 'App Alert', and 'UnLock Apps'. The main content 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', 'Rate, Test DMS', 'schindler. kent', 'test. first (colts, indy)', 'schindler. kent', 'test. first (colts, indy) FS', 'Tim, Tom FS', and 'TestL, TestF'. Each row includes 'ADD FS' and 'Edit More' buttons. Below the table, there are pagination controls and 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 App from Dealer Management System (green dollar sign), Sold (green checkmark), Delivered (blue checkmark), New Message (yellow envelope), Read Message (grey envelope), and Credit Report Run (orange document icon). The footer contains copyright information: '© 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 ↑	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

## 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 the Mazda system 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.