



eContracting Self-Enrollment & Training Checklist

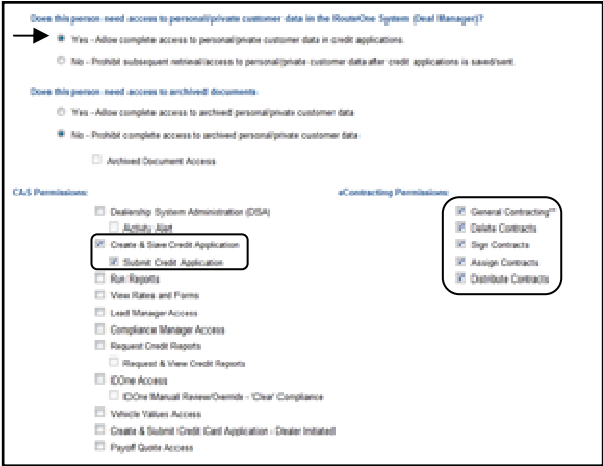
Follow the steps below to prepare for, self-train, and start eContracting on RouteOne. If questions arise at any point in this process, contact the RouteOne Help Desk at 866-ROUTE-01.

Task	Description		Notes
I. Sign and Submit Agreements			
Accept Electronic Dealer Participation Agreement (eDPA)	<ul style="list-style-type: none"> ▪ Login to www.routeone.com, and access the rates & forms tab – Navigate to the 'Premium Service's and scroll down to the 'eContracting Subscription' section. ▪ Click 'Subscribe' and complete the subscription process. 	<input type="checkbox"/>	
Sign / submit FS Agreement	Follow instructions on form for how to submit.	<input type="checkbox"/>	
II. Verify Computer Requirements are met			
Verify Operating System	<ul style="list-style-type: none"> ▪ Windows XP (minimum) ▪ Windows Vista or higher ▪ Windows 7 <p>(Right-click on My Computer on the desktop -> Check System listed)</p>	<input type="checkbox"/>	
Verify Processor	<ul style="list-style-type: none"> ▪ 1.6 GHz (minimum) ▪ 2.8 GHz or higher <p>(Right-click on My Computer on the desktop -> Check System listed)</p>	<input type="checkbox"/>	
Verify RAM	<ul style="list-style-type: none"> ▪ Windows XP – 1 GB ▪ Windows Vista – 2 GB (absolute minimum) ▪ Windows 7 – 2 GB <p>(Right-click on My Computer on the desktop -> Check System listed)</p>	<input type="checkbox"/>	

Task	Description		Notes
Verify Free Hard Disk Space	<ul style="list-style-type: none"> ▪ 200 MB (minimum) ▪ 400 MB (recommended) <p>(Right-click on My Computer on the desktop -> Right-click on Local Disk C:\ -> Select Properties -> View free space listed there)</p>	<input type="checkbox"/>	
Verify Internet Connection	<ul style="list-style-type: none"> ▪ ISDN 384.0 Kbps ▪ DSL/Cable 384K <p>(Click on Start -> Select Settings -> Click Network Connections -> Double-click on Local Area Connection -> View speed listed there)</p>	<input type="checkbox"/>	
III. Verify Hardware Requirements are met			
Verify Signature Pad Installed	<ul style="list-style-type: none"> ▪ Interlink ePad-Ink or Topaz SigGemModel T-LBK 76658 <p>(Check bottom of sig pad for model number) SigPad ordering information:</p> <p><u>FORD CREDIT</u> dealers - Click on the link below to order a sig pad: http://www.governorsolutions.com/epad/ford_gateway.html 1-800-333-2600 Ext 8992</p> <p><u>All other dealers:</u></p> <p><u>Interlink:</u> USB Powered ePad-Ink Call 800 520 3464 or visit http://store03.prostores.com/epadlink76883663</p> <p><u>Topaz:</u> Order the SignatureGem™ LCD 4x5 T-LBK766SE-BH165 Web site for ordering Topaz sig pad: http://www.ctimeprivatetore.com/RouteOne/ Be sure to request the RouteOne Rebate</p>	<input type="checkbox"/>	<p>Note: Aside from Topaz, RouteOne only supports the ePad-Ink – ePad is NOT supported.</p>

Task	Description		Notes
Verify Laser Printer Installed	<ul style="list-style-type: none"> ▪ Color - 12 pages per min (<i>recommended</i>) ▪ Black & White - 22 pages per min (<i>recommended</i>) ▪ Duplex capability <p>(Click Start -> Settings -> Choose Printers & Faxes -> Right-click on printer -> Select Properties -> View Properties listed there)</p>	<input type="checkbox"/>	Note: Some states may require color printer. Please check with your Finance Source Rep.
Verify Fax Machine	<ul style="list-style-type: none"> ▪ Modem - 14,400 BP (<i>recommended</i>) ▪ Memory - 1MB (<i>recommended</i>) ▪ Auto Doc Feed - 20 sheets <p>(Click Start -> Settings -> Choose Printers & Faxes -> Right-click on printer or fax machine -> Select Properties -> View Properties listed there)</p>	<input type="checkbox"/>	
Verify Scanner settings	<ul style="list-style-type: none"> ▪ 75dpi (<i>recommended</i>) <p>(Go to scanner, or multi-purpose printer, click Scan button -> choose Settings -> Check for Resolution setting. Contact support line/person of company that makes scanner to learn how to change setting, if need be)</p>		
Verify Monitor Display	<ul style="list-style-type: none"> ▪ 800 X 600 (minimum) ▪ 1024 X 768 (<i>recommended</i>) <p>(Right-click on your desktop -> Select Properties -> Select Settings -> View screen resolution (and adjust if need be)</p>	<input type="checkbox"/>	
IV. Verify Software Requirements are met			
Verify You Have Admin Rights to Your Computer	<ul style="list-style-type: none"> ▪ To be sure you can install any needed software upgrades <p>(Right-click on the My Computer icon on the desktop -> Select Manage -> Expand Local Users and Groups -> Highlight Groups (in left pane) -> Double-click Administrators -> check to see if your user ID is listed – if No, no admin rights, if Yes, you have admin rights)</p>	<input type="checkbox"/>	

Task	Description		Notes
Verify Interlink or Topaz Signature Driver Installed	<ul style="list-style-type: none"> ▪ Interlink Electronics ePad-Ink Support Package 8.0/9.50 or SigPlus SE ActiveX version 3.68 <p>(Click Start button -> Select Settings -> Select Control Panel -> Select Add/Remove Programs -> Look for either Interlink(eOriginal) or Topaz driver listed (list is in alphabetical order)</p>	<input type="checkbox"/>	
Verify Adobe Reader is Installed	<ul style="list-style-type: none"> ▪ Version v9.1 or higher <p>(From within Adobe screen, click on Help menu -> Select 'About' to see version number of Adobe)</p>	<input type="checkbox"/>	
Verify That Pop-Up Blockers are Disabled	<p>IE, Yahoo, Google, others ***Allow pop-ups from RouteOne.com</p> <p>(From within IE, click Tools -> Select Pop up Blocker -> Select Pop Up Driver Settings -> View Allowed Sites -> Select site and click 'Remove' to remove a site so you no longer are blocking the site)</p>	<input type="checkbox"/>	
Verify MS Internet Explorer Version Installed	<ul style="list-style-type: none"> ▪ Version 7.0 or higher (version 8.0 or 9.0 highly recommended) <p>(From within IE screen, click on Help menu -> Select 'About' to see version number of IE)</p>		

Task	Description		Notes
<p>Verify your eC Permissions are Set Up in RouteOne for eContracting</p>	<ul style="list-style-type: none"> Permissions define the activities that a user can perform within eContracting. As soon as you are notified that your dealership has been made active to use eContracting, follow these steps: 1) Navigate to the Admin tab within RouteOne <ul style="list-style-type: none"> 2) Click the Edit button for the user that requires permission setup <p>General eContracting:</p> <ul style="list-style-type: none"> 1) Click YES for the radio button that states "Allow complete access to personal/private customer data in credit applications" 2) Check the box that states 'Create & Save a Credit App' 3) Check the box that states 'Submit Credit App' 4) Select the appropriate permissions for each user, for the check-boxes under 'eContracting Permissions' based on the table below: 	<input type="checkbox"/>	

Task	Description	Notes
	<p><u>Sign Only Permission:</u></p> <ul style="list-style-type: none"> ▪ 1) Ensure 'No' is selected under "Does this person need access to personal/private customer data in the RouteOne System (Deal Manager)?" ▪ Under 'eContracting Permissions' select the 'Sign Contracts' permission ONLY <ul style="list-style-type: none"> ○ To all a dealer user the capability to also eSign the Credit Application, the user must (at least) be give the following CAS Permission: <ul style="list-style-type: none"> ▪ Create & Save Credit Application <div data-bbox="596 781 1293 1339" style="border: 1px solid black; padding: 5px; margin-top: 20px;"> <p>Does this person need access to personal/private customer data in the RouteOne System (Deal Manager)?</p> <p><input type="radio"/> Yes - Allow complete access to personal/private customer data in credit applications.</p> <p><input checked="" type="radio"/> No - Prohibit subsequent retrieval/access to personal/private customer data after credit applications is saved/sent.</p> <p>Does this person need access to archived documents</p> <p><input type="radio"/> Yes - Allow complete access to archived personal/private customer data</p> <p><input checked="" type="radio"/> No - Prohibit complete access to archived personal/private customer data</p> <p><input type="checkbox"/> Archived Document Access</p> <p>CAS Permissions:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Dealership System Administration (DSA) <input type="checkbox"/> Activity Alert <input checked="" type="checkbox"/> Create & Save Credit Application <input type="checkbox"/> Submit Credit Application <input type="checkbox"/> Run Reports <input type="checkbox"/> View Rates and Forms <input type="checkbox"/> Lead Manager Access <input type="checkbox"/> Compliance Manager Access <input type="checkbox"/> Request Credit Reports <input type="checkbox"/> Request & View Credit Reports <input type="checkbox"/> iDOne Access <input type="checkbox"/> iDOne Manual Review/Override - 'Clear' Compliance <input type="checkbox"/> Vehicle Values Access <input type="checkbox"/> Create & Submit Credit Card Application - Dealer Initiated <input type="checkbox"/> Payoff Quote Access <p>eContracting Permissions:</p> <ul style="list-style-type: none"> <input type="checkbox"/> General Contracting** <input type="checkbox"/> Delete Contracts <input checked="" type="checkbox"/> Sign Contracts <input type="checkbox"/> Assign Contracts <input type="checkbox"/> Distribute Contracts </div>	<p>Now upon logging into RouteOne, a dealer user designated to just "sign permission" will only see applicable contracts, based on that permission set-up, in their Contract Manager queue.</p> <p>Contract Statuses that a dealer with 'Signature Permission Only' will be able to complete:</p> <p style="text-align: center;">Contract Status:</p> <ul style="list-style-type: none"> - Contract Generation Complete - Review Copy Printed - Contract Signatures in Process (AC Created) - Contract Signed - Completed Copy Printed <div data-bbox="1598 862 1843 1188" style="border: 1px solid black; padding: 5px; margin-top: 20px;"> <p style="text-align: center; background-color: #0056b3; color: white; padding: 2px;">STATUS</p> <p style="text-align: center; background-color: #0056b3; color: white; padding: 2px;">ALL ▾</p> <ul style="list-style-type: none"> <li style="border-bottom: 1px solid #0056b3; padding: 2px;"> ↑ e 📄 Contract Generation Complete <li style="border-bottom: 1px solid #0056b3; padding: 2px;"> ↑ e 📄 Review Copy Printed <li style="border-bottom: 1px solid #0056b3; padding: 2px;"> ↑ e 📄 Contract Signatures in Process (AC Created) <li style="border-bottom: 1px solid #0056b3; padding: 2px;"> ↑ e 📄 Contract Signed <li style="padding: 2px;"> ↑ e 📄 Completed Copy Printed </div>

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	<table border="1"> <tr> <td data-bbox="533 365 804 511"> <ul style="list-style-type: none"> ▪ Deal Manager Access </td> <td data-bbox="804 365 1356 511"> <ul style="list-style-type: none"> ▪ Minimum permission required for eContracting. Required to view credit applications on the Deal Manager page. </td> </tr> <tr> <td data-bbox="533 511 804 613"> <ul style="list-style-type: none"> ▪ Create & Save Credit Application </td> <td data-bbox="804 511 1356 613"> <ul style="list-style-type: none"> ▪ Minimum permission required for eContracting. Required to create, save and edit credit applications. </td> </tr> <tr> <td data-bbox="533 613 804 813"> <ul style="list-style-type: none"> ▪ General Contracting </td> <td data-bbox="804 613 1356 813"> <ul style="list-style-type: none"> ▪ Minimum permission required for eContracting. Required to create a contract worksheet, validate with the finance source, generate contract documents and facilitate the eSignature process. </td> </tr> <tr> <td data-bbox="533 813 804 915"> <ul style="list-style-type: none"> ▪ Delete Contracts </td> <td data-bbox="804 813 1356 915"> <ul style="list-style-type: none"> ▪ Required to delete contracts and request an Authoritative Copy Conversion (ACC). </td> </tr> <tr> <td data-bbox="533 915 804 1018"> <ul style="list-style-type: none"> ▪ Sign Contracts </td> <td data-bbox="804 915 1356 1018"> <ul style="list-style-type: none"> ▪ Required to sign an eContract document on behalf of the dealership. </td> </tr> <tr> <td data-bbox="533 1018 804 1088"> <ul style="list-style-type: none"> ▪ Assign Contracts </td> <td data-bbox="804 1018 1356 1088"> <ul style="list-style-type: none"> ▪ Required to "assign" a contract to the finance source. </td> </tr> <tr> <td data-bbox="533 1088 804 1157"> <ul style="list-style-type: none"> ▪ Distribute Contracts </td> <td data-bbox="804 1088 1356 1157"> <ul style="list-style-type: none"> ▪ Required to distribute a contract package to the finance source. </td> </tr> </table> <ul style="list-style-type: none"> ▪ 7) Verify that, for this particular user, the Title/Position field text does not have an '&' symbol in it – if it does, replace it with the word 'and' ▪ 8) Click the Save Information button at the bottom of the screen ▪ Repeat the above steps for all users in the dealership who will use eContracting 	<ul style="list-style-type: none"> ▪ Deal Manager Access 	<ul style="list-style-type: none"> ▪ Minimum permission required for eContracting. Required to view credit applications on the Deal Manager page. 	<ul style="list-style-type: none"> ▪ Create & Save Credit Application 	<ul style="list-style-type: none"> ▪ Minimum permission required for eContracting. Required to create, save and edit credit applications. 	<ul style="list-style-type: none"> ▪ General Contracting 	<ul style="list-style-type: none"> ▪ Minimum permission required for eContracting. Required to create a contract worksheet, validate with the finance source, generate contract documents and facilitate the eSignature process. 	<ul style="list-style-type: none"> ▪ Delete Contracts 	<ul style="list-style-type: none"> ▪ Required to delete contracts and request an Authoritative Copy Conversion (ACC). 	<ul style="list-style-type: none"> ▪ Sign Contracts 	<ul style="list-style-type: none"> ▪ Required to sign an eContract document on behalf of the dealership. 	<ul style="list-style-type: none"> ▪ Assign Contracts 	<ul style="list-style-type: none"> ▪ Required to "assign" a contract to the finance source. 	<ul style="list-style-type: none"> ▪ Distribute Contracts 	<ul style="list-style-type: none"> ▪ Required to distribute a contract package to the finance source. 	
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VI. Read through Training Documents & Start eContracting!

Print out the eC Reference Guide	<p>Visit www.routeone.com</p> <p>Go to the Rates & Forms tab -> RouteOne eContracting Enrollment and Training Materials Area -> Click to access the eC Reference Guide (Alternatively, you can access the document from the 'News & Info Tab' within RouteOne.com, under Training -> eContracting documents)</p>	<input type="checkbox"/>	
Print out the eC Quick Start Guide	<p>Visit www.routeone.com</p> <p>Go to the Rates & Forms tab -> RouteOne eContracting Enrollment and Training Materials Area -> Click to access the eC QuickStart Guide (Alternatively, you can access the document from the 'News & Info Tab' within RouteOne.com, under Training -> eContracting documents)</p>	<input type="checkbox"/>	
eContract with a Customer	<p>Contact the RouteOne Help Desk if you get stuck or need help (866-ROUTE-01)</p> <p>Contact your local Finance Source rep for any finance-source specific issues / questions</p>	<input type="checkbox"/>	