



Three-Way Integration Guide

The RouteOne Wilson Technologies integration enables an exchange of credit application information from your Wilson Technologies (WT) system to RouteOne. Fields on the RouteOne credit application will be populated with information obtained electronically from your WT system, thereby eliminating duplicate data entry.

Saved or decisioned credit applications in the RouteOne system can be easily exported to your WT system. In addition, the RouteOne WT integration solution also provides enhanced reporting on all F&I information, which is extracted nightly from your WT system. Closed or final deal information will automatically populate the F&I Log, Decision Analysis, and Time Sales Analysis reports in the RouteOne Dealer Reporting Suite.



Customer Entry and Authentication

1. Scan the customer's license, making sure that it is face down on the scanner.
2. If necessary for a change of address, repeat this procedure for the back of the license by clicking "Scan Back of License".
3. Confirm that the customer's information is correct and current before authentication.



Customer Entry and Authentication (continued)

4. Enter Sales information.
5. Select "Authenticate" or select "Enter Only".
6. An assessment will be reported back to the screen within 20 seconds indicating either "Assessment Passed" or "Manager's Review Recommended" as shown below the keyboard image.
7. In the event of the latter, additional information should be obtained from the customer before proceeding.
8. As the kiosk accepts the customer's information it will encrypt and transfer the data to web accessible storage.



Importing Applications from Wilson Technologies to RouteOne

If the customer proceeds with the deal:

- Logs onto the WT website
- Accesses that customer's file in the database
- Click on the RouteOne icon to pull up the pre-populated credit application
- Fill in any required additional data

Wilson Technologies RouteOne Application - Microsoft Internet Explorer

Address: <https://www.wilsontechnologies.us/Wilson/CustomServlet?action=customerForward&custID=pinckney&pkid=27090&page>

ROUTEONE APPLICATION

Application

App Type: * Individual Individual with CoApplicant Business
 Business with CoApplicant Commercial

Deal Type: * Finance Lease Balloon

Applicant

Last Name / Business * First Name * Suffix Driver's License # *

Current Street Address * City * State * ZipCode * SSN (Tax ID#) *


Home Phone Date Of Birth Email Address

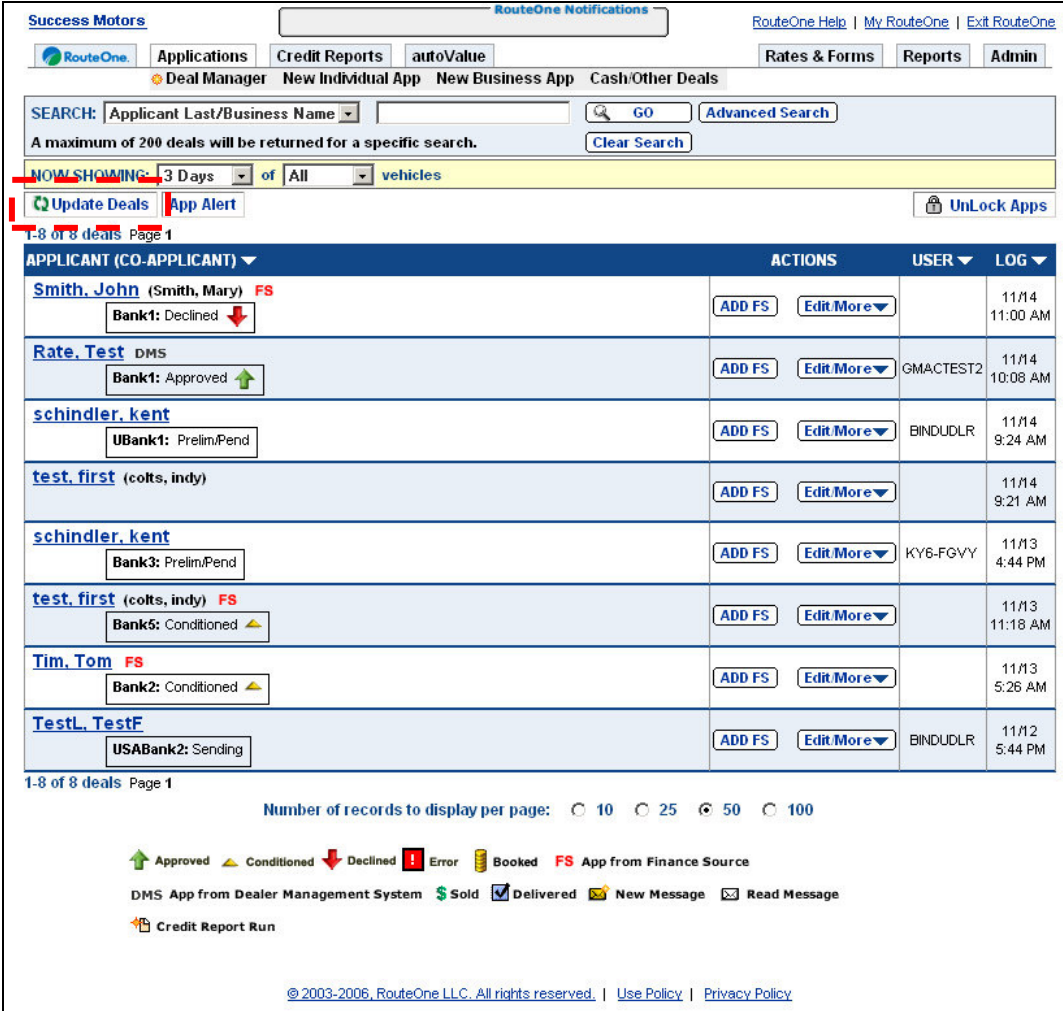
Owns Buying Rents Family MobileHome Unknown

Time at Address yrs mo Mortgage Company Mtg. Payment / Rent \$

Current Employer Time Employed yrs mos

Locating Imported Deals in RouteOne

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-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 FS IMPORT icon next to the primary applicant's name.



The screenshot shows 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 the text 'SEARCH: Applicant Last/Business Name' and a 'GO' button. A yellow banner indicates 'NOW SHOWING: 3 Days of All vehicles'. The main table lists deals with columns for 'APPLICANT (CO-APPLICANT)', 'ACTIONS', 'USER', and 'LOG'. The first row shows 'Smith, John (Smith, Mary) FS' with a 'Bank1: Declined' status and 'ADD FS' and 'Edit More' buttons. Other rows include 'Rate, Test DMS', 'schindler. kent', 'test. first (colts, indy)', 'schindler. kent', 'test. first (colts, indy) FS', 'Tim, Tom FS', and 'TestL, TestF'. A legend at the bottom explains various status icons like 'Approved', 'Conditioned', 'Declined', 'Error', 'Booked', 'FS App from Finance Source', etc.

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 Wilson Technologies 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 Wilson Technologies

RouteOne WT integration also allows you to export the credit application and Finance Source decision from RouteOne to your WT system.

1. From the RouteOne Deal Manager, click the **Edit/More** link for the credit decision you wish to export.
2. Select **Export Application to DMS**.

The screenshot displays the RouteOne Deal Manager interface. At the top, there are navigation tabs for 'RouteOne', 'Applications', 'Credit Reports', and 'autoValue'. Below these are buttons for 'Deal Manager', 'New Individual App', 'New Business App', 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, it says 'NOW SHOWING: 3 Days of All vehicles'. There are buttons for 'Update Deals', 'App Alert', and 'UnLock Apps'. The main content area is a table with columns: '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'. The 'ACTIONS' column for the 'schindler, kent' row is expanded, showing a dropdown menu with options: 'Edit this Application', 'Remove Co-Applicant', 'Swap Applicant/Co-Applicant', 'View/Print Finance Source Decision', 'View/Print this Application', 'Export Application to DMS' (highlighted with a red box), 'Credit Reports', 'Text Messages', 'Show all Copies of this App', and 'Copy this Application'. Below the table, there is a legend for deal statuses: 'Approved', 'Conditioned', 'Declined', 'Error', 'Booked', 'FS App from Finance Source', 'DMS App from Dealer Management System', 'Sold', 'Delivered', 'New Message', 'Read Message', and 'Credit Report Run'. At the bottom, there is a copyright notice: '© 2003-2006, RouteOne LLC. All rights reserved. | Use Policy | Privacy Policy'.

3. 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

4. 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 WT 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 WT 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"/> PRELIMINRY - 01/12/2005 - 5:10 PM			
FINANCE SOURCE 2			
<input type="radio"/> APPROVED - 01/12/2005 - 8:19 AM			
<input type="radio"/> PRELIMINRY - 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 WT system.

Locating Exported Deals in Wilson Technologies

Once the deal has been exported from RouteOne to your WT system, open the...

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 WT 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 WT or RouteOne.

1. To run a report, simply click on the **Reports** tab at the top of any RouteOne screen.

Success Motors RouteOne Notifications RouteOne Help | My RouteOne | Exit RouteOne

RouteOne Applications Credit Reports autoValue Rates & Forms **Reports** Admin

Deal Manager New Individual App New Business App Cash/Other Deals

SEARCH: Applicant Last/Business Name

A maximum of 200 deals will be returned for a specific search.

NOW SHOWING: 3 Days of All vehicles

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

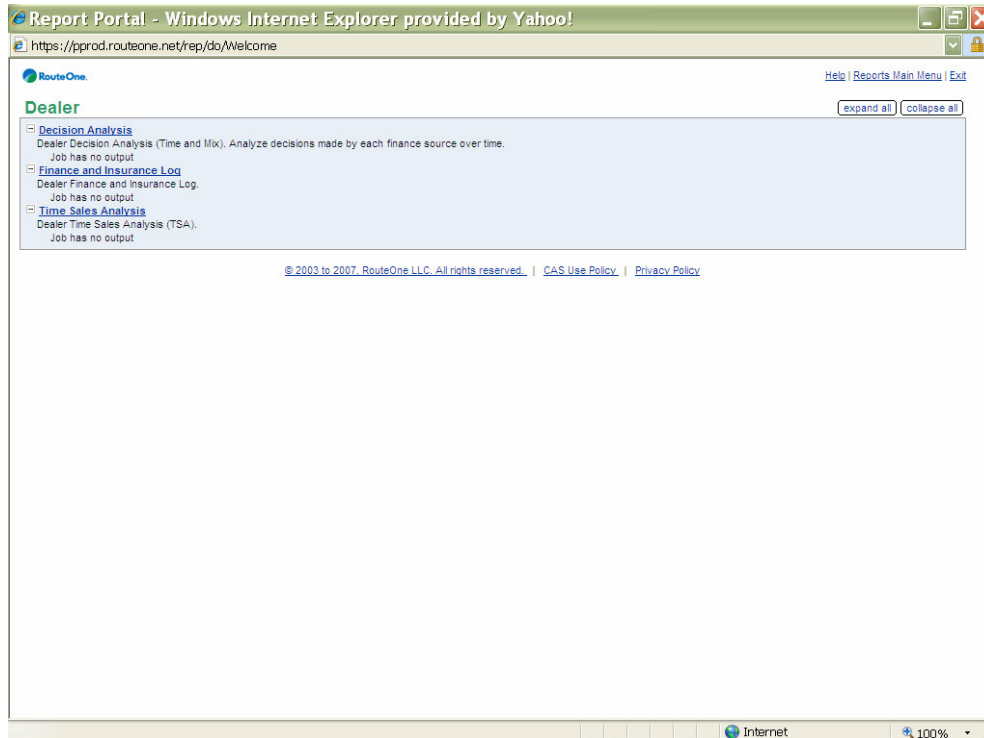
1-8 of 8 deals Page 1

Number of records to display per page: 10 25 50 100

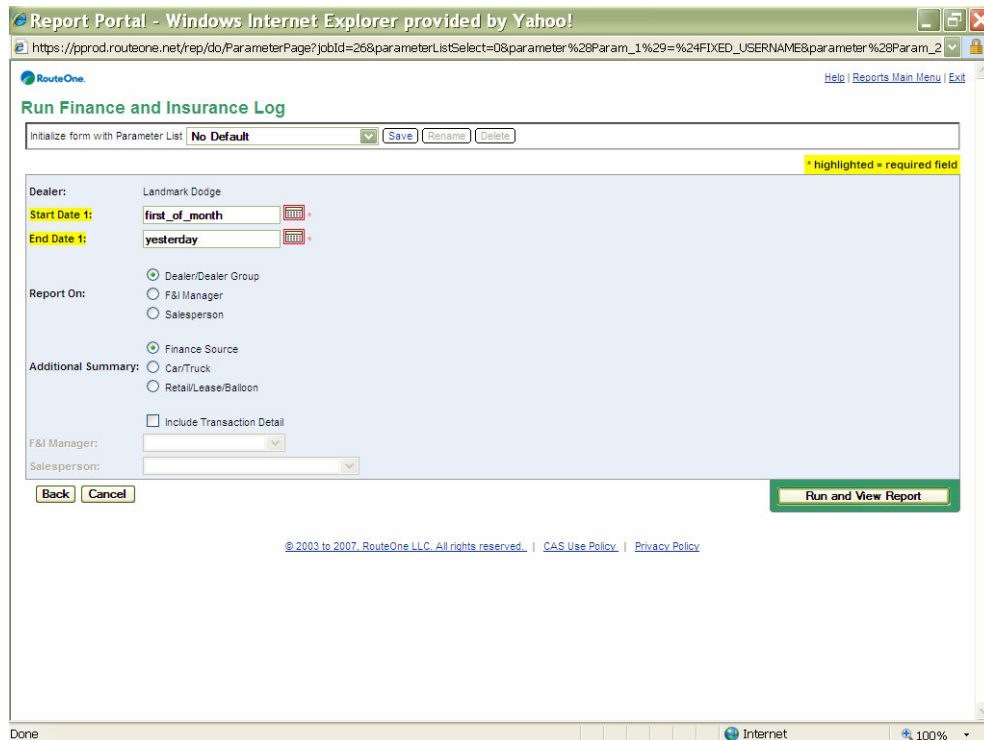
FS App from Finance Source
 DMS App from Dealer Management System

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2. Select the report you'd like to run.



3. You can set various parameters and timeframes to help you better compare and analyze information.



Finance & Insurance Log Report: This report gives you an accurate and complete picture of your dealership's F&I profits. This report closely models many of the manual and automated F&I Logs used by dealers today.

RouteOne
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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		272.80		49,653.60	139		357.22		112,115.54	454		246.95	
Finance Reserve	97,024.90	185	31.2	526.76	164.97	32,209.93	82	59.0	392.80	231.73	65,614.97	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	275.46	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		504.04	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	586	98.8
FORD MOTOR CREDIT CO.	4	0.7
DCFS TRUST	3	0.5
Total Number of Deals / Sales	593	100.0

Lender summary includes deals with turnover indicator = N


All summary calculations exclude deals with turnover indicator = N

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


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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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Declined 07/21/2006 to 07/21/2006

FMCTst - All Decisions - (10 records returned)


Date	Customer Name	Veh. Make	Veh. Model	Veh. Year	HUD	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”).


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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.

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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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