This document provides RouteOne users a high-level view of key features, functionality, and tips of RouteOne’s Dealer Rate Exception Form. The RouteOne system provides you the technology, tools, and support to help your dealership work efficiently and maximize your sales goals. Through RouteOne, your dealership will have access to a network of 1,300+ finance sources, and 125+ Dealership Service Providers.

Setup
- A Dealership System Administrator (DSA) can establish a ‘Dealer Markup Rate’ within the ‘Preferences’ page, under the ‘Admin’ tab.
- This rate will be saved as your ‘Standard Dealer Participation Rate’.

User Permissions
- The Dealer System Administrator can grant user permissions by clicking the ‘Users’ option within the ‘Admin’ tab.

<table>
<thead>
<tr>
<th>CAS Permission</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reviewer for Dealer Rate Exception</td>
<td>Ability to review Dealer Rate Exception Forms</td>
</tr>
</tbody>
</table>

Documenting Downward Deviations
Users may document downward deviations to the dealer rate directly within the RouteOne system.

- To begin documenting downward deviations, visit the ‘Forms’ page by using either option below:
  - Within the ‘Deal Summary’ page, click the ‘Dealer Rate Exception’ button, or
  - Within the ‘Deal Manager’ page, click the ‘Create/Edit Dealer Rate Exception’ option under the ‘Edit/More’ button.
- Within the ‘Forms’ page, you may create, edit, and/or print the Dealer Participation Certification Form.
Dealer Rate Exception Form

- Example Dealer Rate Exception Form
Dealer Rate Exception Form

Reviewing the Dealer Rate Exception Form

- Once the Dealer Rate Exception Form is created and saved, authorized reviewers that have not initially generated the form can access, edit, and complete the section at the bottom of the Dealer Rate Exception Form within RouteOne.
- Reviewers can access the transaction for review within the ‘Forms’ page, by using either option below:
  - Within the ‘Deal Summary’ page, click the ‘Dealer Rate Exception’ button, or
  - Within the ‘Deal Manager’ page, click the ‘Create/Edit Dealer Rate Exception’ option under the ‘Edit/More’ button.

![Reviewer Certification]

**INSTRUCTION TO COMPLETE THE DEALER RATE EXCEPTION FORM:**

It is the Dealer’s responsibility to ensure that the Dealer Rate Exception Form is populated with the deviation reason that is consistent with the requirements of the Dealer’s Fair Credit Compliance Program. Please select the finance source from the dropdown with which the deal has been finalized. Please enter the standard and final dealer participation rate. Please be sure to enter details in the selected deviation reason text box, if available. You are able to select multiple deviation reasons.

**NOTE:** SecureDocOne Subscribers: If you subscribe to SecureDocOne, the Dealer Rate Exception Form you generate will automatically be stored in SecureDocOne. However, in the event you generate more than one Dealer Rate Exception Form for the same credit application, only the last Dealer Rate Exception Form generated on that credit application will be stored in SecureDocOne.

Reporting

Within the ‘Reports’ tab, subscribers have access to the RouteOne Dealer Rate Exception Form report.

- **Dealer Rate Exception Form (DREF) Usage:** Determines which dealership users are following your dealership’s fair credit compliance program by utilizing and reviewing the form, and other pertinent information.
## Dealer Rate Exception Form Usage

**Dealer: VICTORY MOTORS**

**Finance Source:** All

**Date Range:** 04/01/2016 to 04/12/2016

### Summary

<table>
<thead>
<tr>
<th>Dealer User</th>
<th>Total Contracts</th>
<th>Total Forms</th>
<th>Action Required</th>
<th>Deviation Reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manavalan, Joby</td>
<td>2</td>
<td>2</td>
<td>100.00%</td>
<td>No Deviation, Payment Constraint</td>
</tr>
<tr>
<td>Pappas, Jesse</td>
<td>4</td>
<td>4</td>
<td>100.00%</td>
<td>No Deviation, Payment Constraint</td>
</tr>
<tr>
<td>Howe, Shawn</td>
<td>2</td>
<td>1</td>
<td>11.11%</td>
<td>No Deviation</td>
</tr>
<tr>
<td>Lucas, Frank</td>
<td>11</td>
<td>11</td>
<td>100.00%</td>
<td>No Deviation</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>26</td>
<td>22</td>
<td>15.38%</td>
<td>No Deviation</td>
</tr>
</tbody>
</table>

*Click links within this column to obtain detailed transactional information for customers served by dealership user.*

**Deviation Reasons:**
- No Deviation
- Payment Constraint
- Competing Offer
- Promo Campaign
- Surplemented FS Rate
- Incentive
- Inventory Reduction

**Certify with Correction:**
- 2
- 1
- 1
- 4

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**Addition RouteOne training guides are available through the ‘News/Info’ tab within RouteOne. Dealers may also join complimentary RouteOne System Training Sessions from the ‘News/Info’ tab, or by clicking here. For additional information on the RouteOne system, contact RouteOne Support at 866.768.8301, email R1Support@routeone.com.**

**ADDITIONAL RESOURCES:** Video | Dealer’s Guide to the Dealer Pricing Risk Control Program Compliance Webinar