Importing Deals from High Performance Credit System to RouteOne

- Within the High Performance system, on the ‘New Applicant’ page complete all the required fields with an asterisk (*).
- Before submitting the application, check the “I consent to the Company retrieving and storing my personal credit report”, and “I Agree to the terms and conditions” checkboxes.
- After the customer initials the eSignature box, click the ‘Pull Credit’ button.
- On the ‘Applicant’s Income and Employment Information’ page, complete the required fields (residence time, residence status, income information, employment information, mortgage, and open auto).
- Submit the credit application by clicking the ‘Submit This Application’ button.

Locating Imported Deals in the RouteOne Deal Manager

The Deal Manager is considered the hub of RouteOne, and is designed to help quickly scan and identify the status of deals with easy-to-read icons. The default view shows the last three days of activity, ranked by last activity date/time (most recent first). Only deals with activity in the last 60 days are available for display.

The Deal Manager is accessible by selecting ‘Deal Manager’ within the ‘Deals’ tab. An important tool within the Deal Manager is the ‘Edit/More’ button under the ‘Actions’ column. From here, dealers can easily view, print, copy, or edit an application; run swap the applicant/co-applicant, remove co-applicant, initiate credit reports, create an Adverse Action notice, and more.
Click the ‘Update’ 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.

Submitting Imported Deals in the RouteOne Deal Manager
To submit an imported deal to a finance source, click on the primary applicant’s name in the Deal Manager. Next, you will be taken through the RouteOne application submission process used for all applications. Data entered in your system will populate the RouteOne credit application; however, you must still complete the required fields highlighted in yellow and add at least one finance source before submitting the application.