RouteOne’s innovative Dealer Management System (DMS) integration enables an exchange of credit application and credit decision information between RouteOne and your Reynolds & Reynolds® IGNITE system. Fields on the RouteOne credit application are populated with information obtained electronically from your Reynolds & Reynolds IGNITE system, thereby eliminating duplicate data entry.

Credit Application Quick Reference Guide

System Requirements

In order to access Credit Application from the desktop, you must have the following:

- Desking or F&I Menus infrastructure set up in the F&I store and branch
- Integration with a third-party vendor (if you would like to submit credit applications)
- SDC server with an internet connection for integration

Convert Credit Applications to the Sales and F&I Desktop

Before you convert the credit application module for use in the Sales and F&I desktop, the conversion dialog box displays. To activate Credit Application, you must have access to:

- ODS Utilities (4881)
- Miscellaneous F&I Specifications (4828)
- Miscellaneous F&I Specifications #2 (4829)

After you convert, all users are no longer able to use the Credit Application functionality in the ET blue screen in ERA F&I for that branch. However you can click the ‘Demo’ button to view the credit application module in demonstration mode without converting it. In demo mode, you can see the screens, but cannot save information or submit an application to a third-party vendor.

Please read the following information before you activate Credit Application. Your selection impacts all Credit Application users in this ERA F&I branch.

ERA Credit Application functionality can now be accessed within Sales and F&I CAP, but the functionality must be activated before it can be used. Once it is activated, all users in this FANDI branch will no longer be able to process Credit Applications from the ET blue screen in ERA F&I. Please check with all Credit Application users if selecting YES below.

Do you wish to activate the new Credit Application functionality now?

- **Demo**
  No, but I would like to view the new Credit Application functionality in demonstration mode.

- **No**
  No, do not activate Credit Application now.

- **Yes**
  Activate the new Credit Application now and remove access from the ET screen in ERA F&I.
Submitting a Credit Application

- You can access the credit application from the Sales and F&I desktop and the Application drop-down list or the toolbar icon in Desking.
- NOTE: If you create a credit application for a new deal (one you have not already started in Desking), you can click the ‘Save’ icon at any point in the process. The system creates a deal number for that information. If you open that deal in Desking, the information you saved in the credit application populates in the Deal/Lease Worksheet.
- Do one of the following:
  - After you complete the deal in the Deal/Lease Worksheet, click the ‘Send to F&I’ button. The system returns you to the Desking Start Page. From the Credit Application drop-down list, select the ‘New Credit Application’ option.
    - Note: You cannot access the Credit Application drop-down list from the Deal/Lease Worksheet because you cannot have a deal open in two applications at the same time.
  - On the Sales and F&I desktop, click the ‘Credit Application’ button, and then click the ‘Launch’ button.
- Do one of the following:
  - In the Customer # field in the New Credit Application section, enter the customer number, or click the ‘Search’ icon. Click the ‘New Credit Application’ button.
  - In the Deal # field, enter the deal number, or click the ‘Search’ icon. Click the ‘New Credit Application’ button.
  - Select the deal number from the Last 20 Applications section of the screen, and click the ‘Select’ button.
Click the ‘New Credit Application’ button. In the Applicant window, complete the necessary fields in the Applicant, Previous Address, Billing Address, and Other Information sections, then click the ‘Next’ button.

In the Applicant – References window, complete the necessary fields in the Relatives Not Living With You #1 and #2, Personal Friends #1 and #2, and Creditor #1 and #2 sections, then click the ‘Next’ button.

In the Applicant – Employment window, complete the necessary fields in the Current Employment, Previous Employment 1, and Previous Employment 2 sections, then click the ‘Next’ button.
In the Applicant – Assets window, complete the necessary fields in the Landlord/Mortgage Information, Bank Information 1, and Bank Information 2 sections, then click the ‘Next’ button.

Repeat the steps below for the Co-Applicant information.

In the Previously Financed Vehicles window, complete the necessary fields in the Previous Financed Vehicle 1, 2, 3, and 4 sections, then click the ‘Next’ icon.

From the drop-down list, select the Application Type.

In the Deal window, complete the necessary fields in the Vehicle, Trade-Ins, Deal Information, and Signatures sections, then click the ‘Next’ icon.

NOTE: The fields in the Deal Information section may change depending on whether you select Retail or Lease from the Deal Type drop-down list.
• In the Insurance window, complete the necessary fields, then click the ‘Next’ button.

• On the Decision window, click the ‘Transmit’ icon, 📦.
• Click the ‘TransNote’ button.
  o You must complete all the required fields before you can transmit the application. If you have not completed all of the required fields, a dialog box displays. Click the ‘OK’ button and complete the required fields.
    ▪ NOTE: If the selected ‘Vendor allows notes to be transmitted’, the Transmission Notes dialog box displays. After you enter the note, click the ‘OK’ button.
• The Transmission Status dialog box displays. Click the ‘Yes’ button if you want to open the third-party vendor’s website in your Internet browser, or click the ‘No’ button if you do not want to open the window.
  o Note: You must have the vendor’s web address set up in the Options window to open the vendor’s website from this dialog box
Search for a Credit Application

- To search for a credit application, complete the following steps:
  - On the Sales and F&I desktop, click the ‘Credit Application’ Icon and click the ‘Launch’ button.
  - In the Search Credit Applications section of the screen, fill in one or more of the following fields:
    - Deal #: Enter the deal number, or click the ‘Search’ icon
    - From: From the drop-down list, select the beginning date for the search date range
    - To: From the drop-down list, select the ending date for the search date range
    - Last Name: Enter the customer’s last name
    - First Name: Enter the customer’s first name
    - Status: From the drop-down list, select the credit application status
    - User: From the drop-down list, select the user name
  - Click the ‘Search’ button.
    - You can sort the returned list of applications in ascending or descending order by any of the columns.

Print Credit Application Forms

You can print the credit application forms from the Print Application screen. Follow the instructions for printing forms in the Desking help files.

- NOTE: Initially, the system displays a list of all possible forms. After you have ordered the credit application form, it returns only that form in the forms list.
View Errors

To view any Credit Application transmission errors, complete the following steps:

- Within ‘File’, click the ‘Error Reporting’ option.
- In the ‘From’ field, enter the beginning date for the date range that the error falls within.
- In the ‘To’ field, enter the ending date for the date range that the error falls within.
- In the ‘Vendor’ field, enter the third-party vendor to which the application was originally transmitted.
- Enter the deal number.
- Click the ‘Search’ button. In the Errors section of the screen, the system displays a list of applications that meet the search criteria.
  - NOTE: You can sort the list by any of the columns in ascending or descending order.