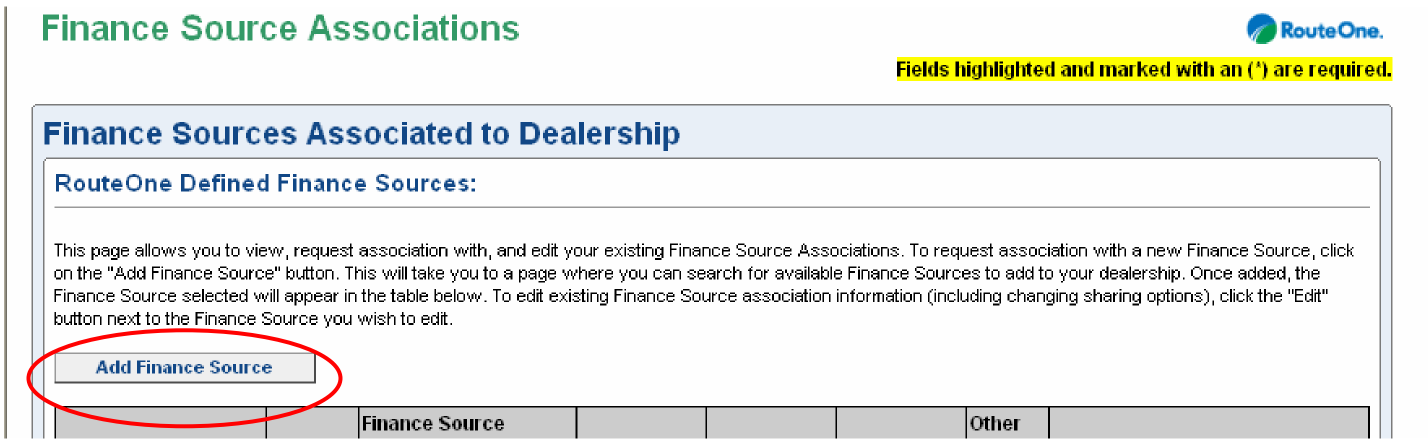
Edit Dealership Information

1. Log into RouteOne and click on the ‘Admin’ tab.
2. On the ‘Dealer Administration Main Menu’, click on the ‘Manage Dealership Information’ link.
3. On the ‘Dealership Information’ page, you may update basic Dealership Information, Dealership Address, Dealership Contacts, Preferences (default Vehicle New/Used and Make for your dealership), and any Enrollment Information notes you’d like to make for yourself.

Edit Finance Source Association Information

Adding a Finance Source

1. Log into RouteOne and click on the ‘Admin’ tab.
2. On the ‘Dealer Administration Main Menu’, click on the ‘Manage Finance Sources’ link.
3. On the ‘Finance Source Associations’ page, you may view those Finance Sources that you can already send a credit application to (‘RouteOne Defined Finance Sources’). If you would like to add to this list, click on the ‘Add Finance Source’ button.



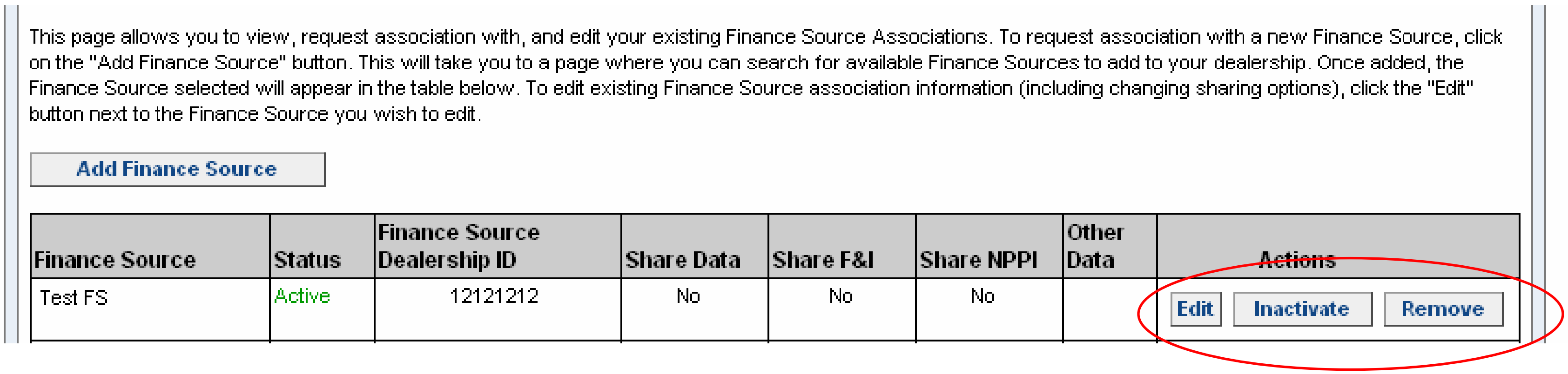
This will take you to the ‘Add Finance Source Association’ page, where you may view all Finance Sources that are currently available in the RouteOne system. If there are Finance Sources on this list that you have a working relationship with, but do not as appear as selectable Finance Sources on the Getting Started page, click on the ‘Associate’ button. Once you are done, click on the ‘Back to Finance Source Associations’ page to return to the ‘Finance Source Associations’ page.

Editing a Finance Source

1. On the ‘Finance Source Associations’ page, you may
   - ‘Edit’ (update FS Dealership ID, decision to Share Data, decision to Share F&I, or turn “off” Share NPPI)

- 'Inactivate' (inactive relationship, i.e. you will no longer be able to send a Credit Application to this FS)
- 'Remove' (removes this Finance Source from active Finance Source list)

for any Finance Source you are currently associated to. Simply click the corresponding button on the Finance Source row you would like to perform the action for.


This page allows you to view, request association with, and edit your existing Finance Source Associations. To request association with a new Finance Source, click on the "Add Finance Source" button. This will take you to a page where you can search for available Finance Sources to add to your dealership. Once added, the Finance Source selected will appear in the table below. To edit existing Finance Source association information (including changing sharing options), click the "Edit" button next to the Finance Source you wish to edit.

Add Finance Source

Finance Source	Status	Finance Source Dealership ID	Share Data	Share F&I	Share NPPI	Other Data	Actions
Test FS	Active	12121212	No	No	No		Edit Inactivate Remove

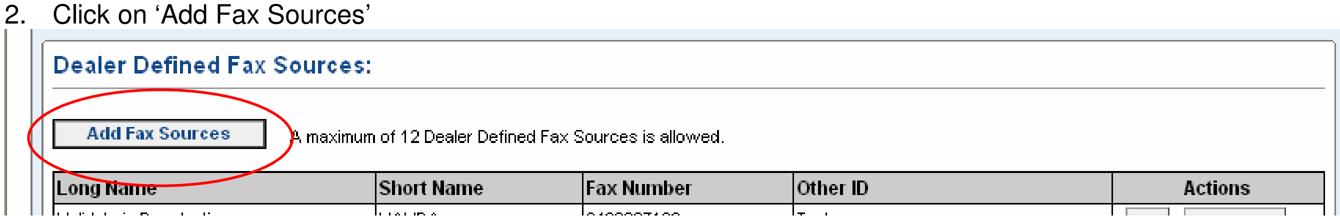
Editing a Dealer User's Captive ID

1. On the 'Finance Source Associations' page, scroll down to the 'Captive IDs for Users'.
2. You may enter the Captive User ID for each user in your dealership. This is the ID that they use to login to your Captive portal. In some cases, this will enable the user to login to their Captive portal, and not have to re-login to RouteOne.

Adding Fax Finance Source(s)

Is your Finance Source not on RouteOne? Don't worry; you can still add them as a 'Dealer Defined Fax Source'. This would allow you to select this Finance Source to send your Credit Application, and RouteOne will send a faxed Credit Application. You may add up to 12 'Dealer Defined Fax Sources'. Here's how:

1. On the 'Finance Source Associations' page, scroll down to the 'Dealer Defined Fax Sources'.
2. Click on 'Add Fax Sources'


Dealer Defined Fax Sources:

Add Fax Sources A maximum of 12 Dealer Defined Fax Sources is allowed.

Long Name	Short Name	Fax Number	Other ID	Actions

3. Complete the 'Fax Source Long Name' (used to display on reports), 'Fax Source Short Name' (used to display while entering your Credit Application), and 'Fax Number' (the phone number the RouteOne system should use to fax the credit application).
4. That's it! Finance Source(s) will now show up as available to send your Credit Application to.

Edit Dealer User Information

Creating a new Dealer User

1. Log into RouteOne and click on the ‘Admin’ tab.
2. On the ‘Dealer Administration Main Menu’, click on the ‘Create New User’ link.
3. Enter all required information (highlighted in yellow), as well as what permissions this new user should have, and if this user has a Captive ID (ID that they use to login to your Captive portal. In some cases, this will enable the user to login to their Captive portal, and not have to re-login to RouteOne).

Editing a Dealer User

1. On the ‘Dealer Administration Main Menu’, click on the ‘Manage Users’ link.
2. From the ‘Users’ screen (where all users for your dealership are displayed), you may:
    - ‘Associate User’ (associate users you have created with other dealerships under your control)
    - ‘Create User’ (takes you to the same page as the instructions above)
    - ‘Edit’ (available for each user; takes you to a page in which you can edit the user’s information, or reset their password)

Editing Credit Bureau / Dealer System Provider information:

Want integration with a DSP, or want to be able to pull Credit Bureaus using RouteOne? Follow the directions below:

1. Log into RouteOne and click on the ‘Admin’ tab.
2. On the ‘Dealer Administration Main Menu’, click on the ‘Manage Credit Bureau Source / Dealer System Provider’ link.
3. A ‘Manage Credit Bureau / Dealer System Provider’ page will be displayed, which will display which ‘Dealer System Provider’, ‘F&I Module’, and ‘Credit Bureau Source’ are currently selected.
4. Click on ‘Change’ to modify your selections.
5. On the ‘Select a Dealer System Provider’ page, select the Dealer System Provider you currently use, and would like to be integrated with on RouteOne. Selecting this will drive your selections for ‘F&I Module’ and ‘Credit Bureau Source’ on subsequent pages. After you make your selection, click on ‘Continue’.
6. On the ‘Select an F&I Module’ page, based on the Dealer System Provider you selected, select an F&I Module you would like to integrate with. After you make your selection, click on ‘Continue’.
7. From the 'Select a Credit Bureau Source' screen select ‘CreditMaster’ (R&R) or ‘ADP Credit Check’ (ADP) if you wish to use Credit Bureaus through your DSP, or ‘Direct Access Powered by RouteOne’ if you wish to use RouteOne Direct Access. Click the **‘Continue’** button.

    If you have selected to use CreditMaster, the next screen will be the Reynolds & Reynolds Configuration screen. Enter your Subscriber number, Subscriber password, and customer number. Click the **‘Continue’** button.

    If you have selected to use Credit Check, you will go directly to the ‘Verification’ screen (see Step 8).

If you have selected to use RouteOne Direct Access, the next screen will be the 'Credit Bureau Configuration' screen. Click **'Edit'** for the Credit Bureaus you would like to utilize, fill out the required information, and click the **'OK'** button. Once you have entered the required information for all the Credit Bureau(s) you would like to use, click on the **'Continue'** button on the 'Credit Bureau Configuration' screen. Required fields for each Credit Bureau are as follows:

<u>TransUnion:</u>
-Status (switch to 'Active')
-Industry Code
-Member Code
-Password
-Market
-Submarket

<u>Equifax:</u>
-Status (switch to 'Active')
-Customer Number
-Security Code

<u>Experian:</u>
-Status (switch to 'Active')
-Preamble
-Subscriber Number
-Subscriber Password

8. From the 'Verification' screen, review your selections and click on the **'Submit'** button.