



**RouteOne Dealership System Administrator (DSA)
Training Manual**

A Dealership System Administrator ('DSA') is a member of the dealership staff assigned to serve as the executor of RouteOne administrative tasks. DSA privileges allow DSAs to add and edit the dealership profile, subscribe for RouteOne products and services, add/delete credit bureau and DSP information, add additional finance sources, and manage dealership users.

To locate a DSA within a dealership, any RouteOne user may enter the system and click 'My RouteOne' at the top right hand corner of the screen. This will show the DSA assigned to that dealership. If the DSA is no longer at the dealership and the position needs reassigning, contact the RouteOne Help Desk at 866.ROUTE01.

All functions available to the DSA can be found under the 'Admin' tab, across the main navigation bar within the system. Only DSAs may access this tab.

The screenshot shows the RouteOne Dealer Manager interface for 'VICTORY MOTORS'. The top navigation bar includes 'RouteOne Home', 'Participating Finance Sources', and 'Participating Dealer Service Providers'. A notification banner reads 'Test RouteOne lite - FS has posted new rates'. The main navigation bar contains tabs for 'News/Info', 'Deals', 'New App', 'eContracts', 'Credit Reports / IDOne', 'Compliance', 'SecureDocOne', 'Payoff Quote', 'Vehicle Values', 'F&I Exchange', 'Rates & Forms', 'Reports', and 'Admin'. The 'Admin' tab is selected, and its dropdown menu is open, listing: 'Dealer Info', 'Premium Services', 'Credit Bureau / DSP', 'Finance Sources', 'Franchise/Brand', and 'Users'. Below the navigation bar is the 'Deal Manager' section with a search bar and filters. At the bottom, an 'APPLICANT (CO-APPLICANT)' table shows 'LastTest, TestFirst' with 'ADD FS' and 'Edit/More' buttons, and a 'LOG' button.

1). Dealer Info

Under 'Dealer Info', a DSA may edit their dealership's contact information as well as set preferences for defaults within the RouteOne platform.

1. Under the 'Admin' tab, click 'Dealer Info.'
2. This brings up the 'Dealership Information' page, which allows for updates of dealership information, including address, contacts (such as Backup Admin, F&I Manager, Dealer Principal), preferences (i.e., setting defaults for the Make and New/Used Indicator for the dealership), eContracting details (where applicable), and enrollment information.
3. **Once the information has been edited or changed, click 'Save Information' at the bottom of the page to retain the changes.**

DSAs may also set their preferences for tools used within RouteOne. These include:

- New/Used indicator default
- Preferences for masking social security #, Tax ID, Driver's License #
- Deal Saver settings
- Active User Report Settings
- Mobile Services participation
- Risk-Based Pricing/Credit Score Disclosure Generation preferences
- eContracting details

Under Dealer Info, DSAs may also view the instructions for using the Privacy Notice Form Builder.

2). Premium Services

The 'Premium Services' link allows the DSA to subscribe to RouteOne products and services.

1. Under the 'Admin' tab, click 'Premium Services.'
2. Follow the links and directions provided to subscribe (or unsubscribe) your dealership to:
 - a. RouteOne SecureDocOne
 - b. CARFAX Vehicle History Reports
 - c. Vehicle Values
 - d. IDOne
 - e. USEA – Equity Advantage Program
 - f. Credit Application eSigning
 - g. WebApplyOne
 - h. Credit Card Services (offered by OEM)
 - i. eContracting

3). Credit Bureau / DSP (Dealer System Provider)

This tab allows DSAs to edit/add credit bureau or DSP information.

1. Under the 'Admin' tab, click 'Credit Bureau/DSP'.
2. A 'Manage Credit Bureau / Dealer System Provider' page will be presented. If you are currently associated to a Credit Bureau Provider and/or Dealer System Provider (DSP), that information will be displayed within the table.

Adding/Editing Credit Bureau Information

1. To view or change existing Credit Bureau Codes, click on the 'Add/Edit Credit Bureau' button.

Credit Bureau / Dealer System Provider Summary

Listed below are the Dealer System Providers in which your dealership is currently 'Active' with, or has 'Requested' activation with, as well as your Credit Bureau Source. Please click the 'Add/Edit DSP' button to modify your Dealer System Providers selections, or the 'Add/Edit Credit Bureau' to change your Credit Bureau selection.

Dealer System Provider		CREDIT APPLICATION				eC
DSP	Dealer/DSP Status	Send Data from DSP to RouteOne	Send Data from RouteOne to DSP (Manually)	Send Data from RouteOne to DSP (Automatically)	F&I Reporting	Electronic Contracting
TEST DMS	Requested	Requested	Requested	Pending DSA	Requested	

Credit Bureau Source: Direct Access Powered By RouteOne

2. Scroll down the new page and hit 'Continue'. Then select 'Edit'. View Credit Bureau codes, or, to change /update the CB codes, enter in all the new information. Select 'Continue', then 'Submit.'
3. To add a credit bureau provider (Reynolds' CreditMaster, ADP's Credit Check, or Direct Access Powered by RouteOne) click on the 'Add/Edit Credit Bureau' button.
4. If the credit bureau provider selected does not require codes, select the Credit Bureau, hit 'Continue' and 'Submit. (Note: In selecting ADP Credit Check, 'ELITE' as a DSP needs to be in 'Requested' status FIRST, before selecting ADP Credit Check as a Credit Bureau.)
5. If the credit bureau provider selected does require codes, click the 'Associate Credit Bureau' button. (Note: In selecting CreditMaster (R&R), 'ODS' as a DSP needs to be in 'Requested' status FIRST, before selecting CreditMaster as a Credit Bureau.)
6. Choose each applicable credit bureau provider and enter in the necessary codes per the instructions below, then click 'Add.'

Credit Bureau Selection

This page allows you to configure your dealership's relationship with a Credit Bureau. Simply select the Credit Bureau you wish to configure, set the "Status" field to Active, and enter the required configuration information. This information should have been given to your dealership by the Credit Bureau at the time your relationship with them was established. If you do not have the required information, please contact the Credit Bureau and they will be able to assist you. Your billing information from the Credit Bureau may contain the appropriate contact information. Once you have entered the required configuration information, please click on the "Add" button. This will add the Credit Bureau to your list of currently configured Credit Bureaus. Users will be able to begin pulling credit bureau reports from the configured credit bureaus upon next login.

'Credit Bureau:

Make Selection ▼

Make Selection
EXPERIAN
EQUIFAX
TRANSUNION

Add

Cancel

7. After entering the codes, hit 'Continue,' then 'Submit.'

Requesting or Inactivating a DSP

1. Under 'Admin', select 'Credit Bureau Source/DSP'.
2. Should you choose to request activation of a DSP, 'Add/Edit DSP' button, then the 'Show Inactive DSP's' and choose the DSP desired. Put EVERY applicable module into 'Requested' status, and then click 'Submit'. (*Modules include Dealer/DSP Status, Send Data from DSP to RouteOne, Send Data from RouteOne to DSP (Manually), Send Data from RouteOne to DSP (Automatically), F&I Reporting, Electronic Contracting*).
3. If you currently have a DSP(s) in 'ACTIVE' status and wish to inactivate the association, change EVERY applicable module to "inactive" status, then click 'Submit.'
4. To make any DSP associations 'ACTIVE', contact the DSP and request they send an integration request form to RouteOne.

4). Finance Source Association Information

This tab allows you to request an association with a new finance source, or inactivate/remove a relationship with finance sources with whom you have an existing relationship.

To Inactivate/Remove/Edit a Relationship with an Existing Finance Source

1. Under 'Admin', select 'Finance Sources'.
2. The 'Finance Source Associations' page displays the finance sources to which you are currently associated. To Edit, Inactivate, or Remove a finance source, select the appropriate button within the 'Actions' column. Available functionality within each button is outlined below:
 - **'Edit'**: updates FS Dealership ID, decision to Share Data, decision to Share F&I, decision to Share NPPI or turn "off" Share NPPI
 - **'Inactivate'**: inactivates relationship. By choosing 'Removed by Dealer' or 'Inactivated by Dealer' status, your dealership will no longer be able to send credit applications to this finance source
 - **'Remove'**: removes this finance source from active finance source lists for any finance source with whom your dealership is associated

Finance Sources Associated to Dealership

RouteOne Defined Finance Sources:

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

Add Fax Sources

A maximum of 12 Dealer Defined Fax Sources is allowed.

Finance Source	Status	Contracting Association Status	Finance Source Dealership ID	Share Data	Share F&I	Share NPPI	Other Data	Actions
Regulatory	Active		NA	No	No			<div style="display: flex; justify-content: space-around; font-size: x-small;"> Edit Inactivate Remove </div>

Additional Functionality Within 'Finance Sources Associated to Dealership' screen

Editing a Dealer User's Captive ID

1. In the 'Finance Source Associations' section, scroll down and click on the 'Show Captive User ID's' button.
2. Enter the Captive User ID for each user in the dealership. (This ID is what they use to login to their Captive portal.) Chrysler and GMAC dealers use the Captive User ID to log directly into their captive portal and also to RouteOne, without using a RouteOne ID (this is known as 'single sign-on', or 'SSO').



List other finance sources you would like to see:

▶

▼

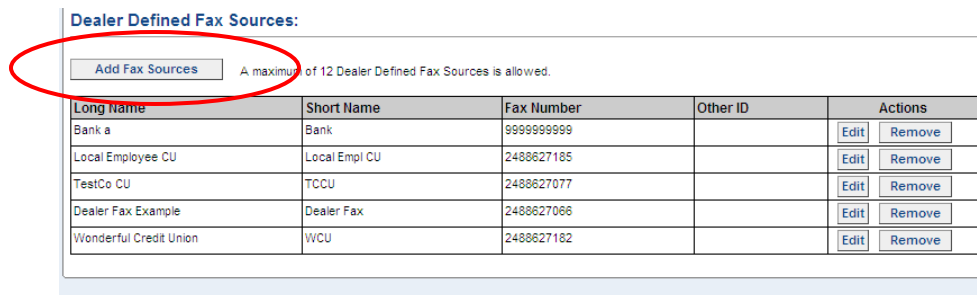
Show Captive User IDs

Save Information Cancel

Adding Fax Finance Source(s)

Finance sources not integrated to RouteOne may be added to the system as a 'Dealer Defined Fax Source'. The finance source will appear as a 'send' option within the Finance Source Associations screen, and will receive a faxed credit application from RouteOne. You may add up to 12 'Dealer Defined Fax Sources'.

1. On the 'Finance Source Associations' page, scroll down to 'Dealer Defined Fax Sources'.
2. Click on 'Add Fax Sources'
3. Complete the outlined information and hit 'Save Information' to retain changes.



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
Bank a	Bank	9999999999		Edit Remove
Local Employee CU	Local Empl CU	2488627185		Edit Remove
TestCo CU	TCCU	2488627077		Edit Remove
Dealer Fax Example	Dealer Fax	2488627066		Edit Remove
Wonderful Credit Union	WCU	2488627182		Edit Remove

To Request a Relationship with a New Finance Source

1. Selecting the 'Add Finance Source' button brings up the 'Available Finance Sources' page, displaying all finance sources currently integrated to RouteOne.

Finance Sources Associated to Dealership

RouteOne Defined Finance Sources:

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.

A maximum of 12 Dealer Defined Fax Sources is allowed.

[Add Finance Source](#)
[Add Fax Sources](#)

Finance Source	Status	Contracting Association Status	Finance Source Dealership ID	Share Data	Share F&I	Share NPPI	Other Data	Actions
Regulatory	Active		NA	No	No			Edit Inactivate Remove

Available Finance Sources

The Finance Sources below are the ones that are available in RouteOne and operate in the state in which you do business. Once you have located the Finance Source with which you would like to request association, check the Share Data checkbox if you would like to share data with that Finance Source (The "Share Data" check allows sharing of anonymous data in Finance Source Reports. Use the "RouteOne Help" link above for more information.). Then, click the "Associate" button for that Finance Source.

Finance Source ID	Finance Source Name	Integration Type	Share Data	Actions
FQ535B	5315b Finance Source	FIFS	<input checked="" type="checkbox"/>	Associate
FQ5325	5325 Finance Source	FIFS	<input type="checkbox"/>	Associate
FQ5327	5327 Finance Source	FAX	<input type="checkbox"/>	Associate
FQ532D	5328D Finance Source	FIFS	<input type="checkbox"/>	Associate
FQ4444	5328d FS 3	FIFS	<input type="checkbox"/>	Associate
FQ6211	6211a Finance Source	FIFS	<input type="checkbox"/>	Associate
FQ6223	6223eC Finance Source	FIFS	<input type="checkbox"/>	Associate
FQ6XXX	68 error test	FIFS	<input type="checkbox"/>	Associate
F000ZX	6th Gear	FIFS	<input type="checkbox"/>	Associate

2. To notify a finance source that you wish to establish a relationship with them, click the 'Associate' button. An electronic request will be automatically sent to the finance source for association. This finance source will immediately appear as 'Requested' in your list of finance source options and will display as such until the finance source approves the request for 'ACTIVE' association.

5). Franchise/Brand

This page allows you to view, add associations with, and edit your existing Franchise/Brand Associations.

To add an association with a Franchise/Brand, select the “Add Franchise/Brand” button. This will allow you to view the Franchise/Brands available to your dealership (only for new Franchise/Brands – used does not apply). Once added, the Franchise/Brand selected will appear in the table below.

Franchises/Brands Associated to Dealership

RouteOne Defined Franchises/Brands:

This page allows you to view, add association with, and edit your existing Franchise/Brand Associations. To add association with a Franchise/Brand, click on the "Add Franchise/Brand" button. This will take you to a page where you can view available Franchises/Brands to add to your dealership. Note that this association should only be setup for affiliation with new Franchises/Brands, not used. Once added, the Franchise/Brand selected will appear in the table below. To edit existing Franchise/Brand association information (including changing sharing options), click the "Edit" button next to the Franchise/Brand you wish to edit.

Franchise/Brand Name	Franchise/Brand ID	Status	Franchise/Brand Dealership ID	Share Data	Actions
Buick	B00BCK	Active		No	<input type="button" value="Edit"/>
Dodge	B00DDG	Active		No	<input type="button" value="Edit"/>
Cadillac	B00CAD	Active		No	<input type="button" value="Edit"/>
Lexus	B00LXS	Active		No	<input type="button" value="Edit"/>
Lincoln	B00LNC	Active		No	<input type="button" value="Edit"/>
Harley-Davidson	B000HD	Active		No	<input type="button" value="Edit"/>
Toyota	B00TYT	Active		No	<input type="button" value="Edit"/>
Ford	B00FRD	Active		No	<input type="button" value="Edit"/>
Chevrolet	B00CHV	Active		No	<input type="button" value="Edit"/>
Chrysler	B00CHR	Active		No	<input type="button" value="Edit"/>
GMC	B00GMC	Active		No	<input type="button" value="Edit"/>

6). Dealer User Information

This tab allows the DSA to create and edit permissions for users within the dealership.

Creating a new Dealer User

1. Under 'Admin,' click 'Users.'
2. On 'Users Associated with this Dealership' page, click on the 'Create User' button.
3. Enter all required information (highlighted in yellow), as well as the appropriate permissions.
4. If this user has a Captive ID, enter it at this time.
5. A screen will appear stating 'Dealer User Created Successfully.' This will also provide the new user's RouteOne ID, which the user will need (as well as the password that was just created for them) to log in to RouteOne directly.

Users Associated with this Dealership

This page lists the dealership users that currently have access to RouteOne. From this page you can edit an existing User Profile, create a new user for your dealership, or give access to your dealership to a user you previously created. To edit an existing User Profile, click the "Edit" button next to that user in the list below. To create a new user, click on the "Create User" button. To give access to your dealership to an existing user you previously created, click on the "Associate User" button.

Associate User
Create User

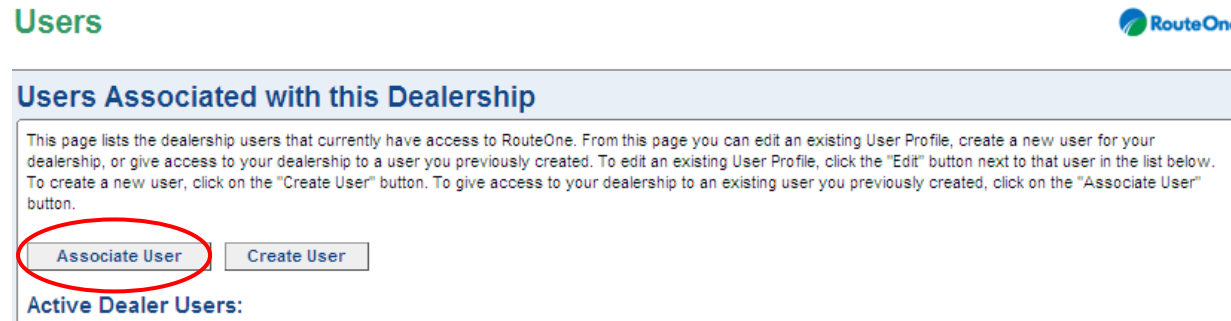
Active Dealer Users:

User Name	User ID	Email	Phone	Permissions	Status	Actions
Abraham, Jacob QA	QAUSER.2349090			Dealer IDV role Enter Cash/Other Deal Request/View Credit Reports Create & Submit Credit Application with Deal Manager Access Vehicle Values View Rate Sheets Administration Run Reports	Active	Edit

Associating a Dealer User

This allows for the association of users to a particular dealership.

1. Under 'Admin,' select 'Users.'
2. On 'Users Associated with this Dealership' page, click on the 'Associate User' button.



3. Enter the already existing User Name, User ID, or Captive ID and hit 'Search.'
4. When the user to associate is located, click the 'Select' button (under Actions), scroll to the bottom and hit 'Save and Exit.' Profile information or permissions for this user may be edited at this time.

Editing a Dealer User

1. Under 'Admin,' select 'Users'.
2. Enter and update profile information and permissions (including password resets) for existing users by clicking the 'Edit' button.

RouteOne training is available for dealer users at no cost. Please contact your captive representative with any questions. Additional inquiries can be directed to the RouteOne Sales Support line at 866.933.0663, or dealers may visit the RouteOne Landing Page for enrollment in complimentary weekly training sessions.