



RouteOne - PBS Systems Integration Guide

RouteOne's innovative Dealer Management System (DMS) integration solution enables an exchange of credit application and credit decision information between RouteOne and PBS Systems. Fields on the RouteOne credit application are populated with information obtained electronically from PBS Systems, thereby eliminating duplicate data entry.

Importing Deals from PBS Systems to RouteOne

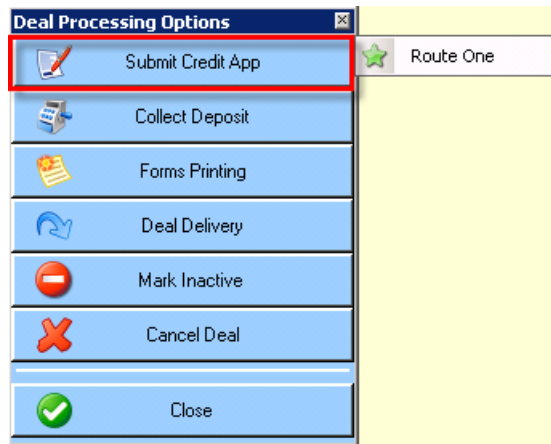
Importing customer deal information from PBS Systems to RouteOne is quick and easy!

Once the deal has been entered in PBS Aristo Deal, select the Processing icon.

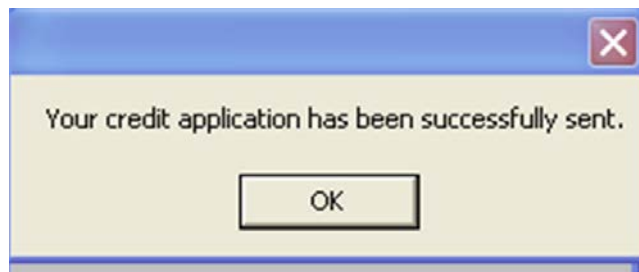
The screenshot displays the RouteOne software interface for a vehicle deal. The top section contains contact information for 'PBS AUTO CENTRE LTD' in Calgary, AB, with a business phone number of (403) 253-6304. The main area shows details for a '2011 DODGE DAKOTA' with stock number BS537925, priced at \$40,090.00. A table of charges and fees is visible, including Air Tax, License Fee, and Reg Fee. The 'Proc' icon in the bottom toolbar is highlighted with a red box.

Field	Value	Field	Value
Price	\$40,090.00	Trade	\$0.00
AIR TAX	\$100.00	Lien	\$0.00
BATTERY TAX	\$0.00	Net Trade	\$0.00
LICENSE FEE	\$0.00	Deposit	\$0.00
TIRE TAX	\$35.00	COD	\$0.00
REG FEE	\$46.15	Term	60
FREIGHT	\$0.00	Bank	RBC
ADMIN FEE	\$399.00	APR	8.50000
Accessories	\$0.00	Balloon	\$0.00
Rebate	\$0.00	Payment	\$955.99
Allowances	\$0.00		


The Submit Credit Application box will appear, select to send your application to RouteOne.

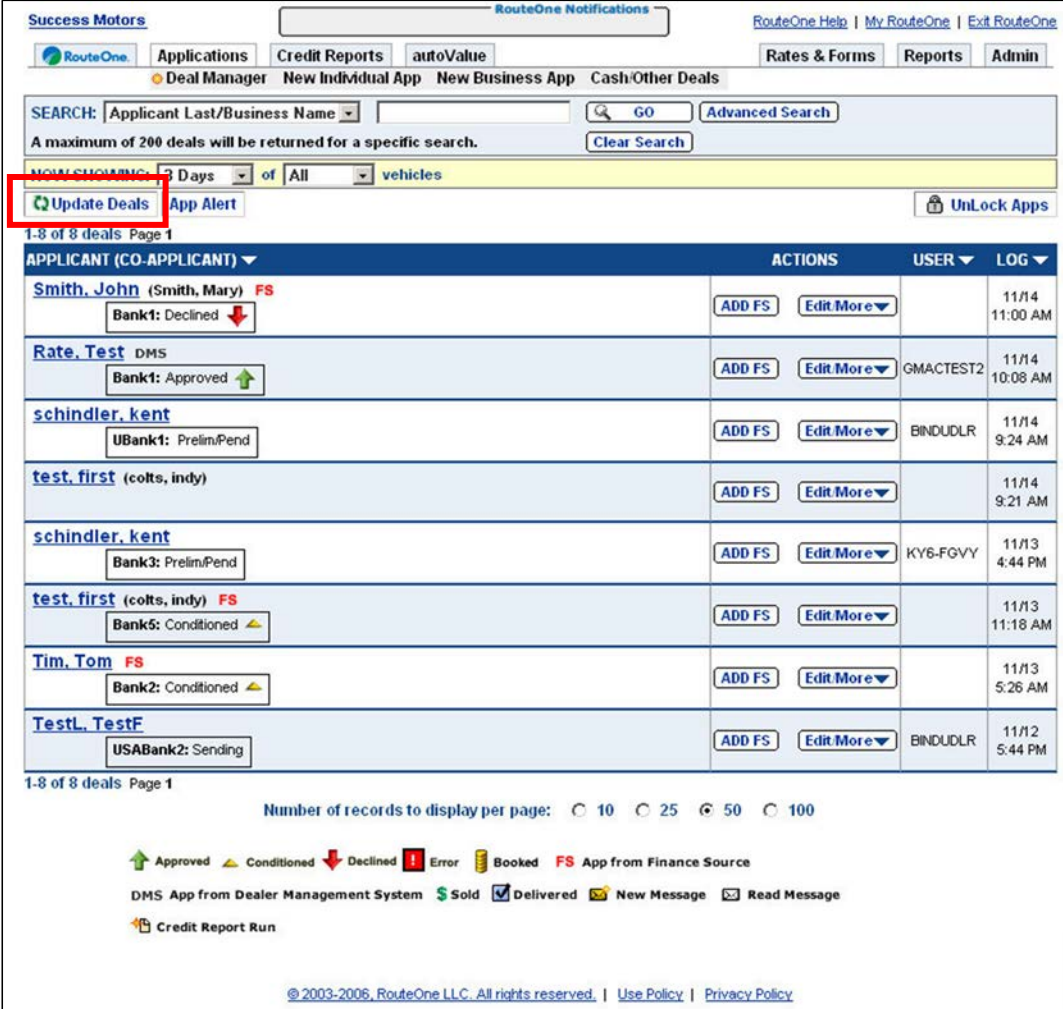


A message box below will display advising the user that the application has been successfully sent.



Locating Imported Deals in the RouteOne Deal Manager

Log onto RouteOne, click on the **Deal Manager** link located under the Applications tab. The Deal Manager is the hub of RouteOne. From here you can manage, locate, and review your deals. Click the  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.



The screenshot displays the RouteOne Deal Manager interface. At the top, there are navigation tabs for 'RouteOne', 'Applications', 'Credit Reports', and 'autoValue'. Below these, there are buttons for 'Deal Manager', 'New Individual App', 'New Business App', and 'Cash/Other Deals'. A search bar is present with a 'GO' button and an 'Advanced Search' link. A note states 'A maximum of 200 deals will be returned for a specific search.' Below the search bar, there are filters for 'Days' and 'vehicles'. A red box highlights the 'Update Deals' button. Below the filters, there is a table with columns for 'APPLICANT (CO-APPLICANT)', 'ACTIONS', 'USER', and 'LOG'. The table contains several rows of deal information, including names like 'Smith, John', 'Rate, Test', 'schindler, kent', 'test, first', and 'Tim, Tom'. Each row has 'ADD FS' and 'Edit More' buttons. At the bottom, there is a legend for deal statuses: Approved (green up arrow), Conditioned (yellow triangle), Declined (red down arrow), Error (red square), Booked (yellow box), FS (red square), App from Finance Source (green square), DMS App from Dealer Management System (blue square), Sold (green dollar sign), Delivered (blue checkmark), New Message (yellow envelope), Read Message (blue envelope), and Credit Report Run (orange document).

APPLICANT (CO-APPLICANT)	ACTIONS	USER	LOG
Smith, John (Smith, Mary) FS Bank1: Declined	ADD FS Edit More		11/14 11:00 AM
Rate, Test DMS Bank1: Approved	ADD FS Edit More	GMACTEST2	11/14 10:08 AM
schindler, kent UBank1: Prelim/Pend	ADD FS Edit More	BINDUDLR	11/14 9:24 AM
test, first (colts, indy)	ADD FS Edit More		11/14 9:21 AM
schindler, kent Bank3: Prelim/Pend	ADD FS Edit More	KY6-FGVY	11/13 4:44 PM
test, first (colts, indy) FS Bank5: Conditioned	ADD FS Edit More		11/13 11:18 AM
Tim, Tom FS Bank2: Conditioned	ADD FS Edit More		11/13 5:26 AM
TestL, TestF USABank2: Sending	ADD FS Edit More	BINDUDLR	11/12 5:44 PM

Submitting Imported Deals to a Finance Source

To submit an imported deal to a Finance Source, simply click on the primary applicant's name in the Deal Manager and you will be taken through the RouteOne application submission process used for all applications. Data entered in PBS Systems will populate the RouteOne credit application; however, you must still complete all required fields highlighted in yellow and choose at least one Finance Source before submitting the application.

Exporting Deals from RouteOne to PBS Systems

The RouteOne PBS Systems integration also allows you to export an application and Finance Source decision from RouteOne to PBS Systems.

1. From the RouteOne Deal Manager, click the **Edit/More** link for the credit decision you wish to export.
2. Select **Export Application to DMS**.

The screenshot displays the RouteOne Deal Manager interface. At the top, there are navigation tabs for 'Applications', 'Credit Reports', and 'autoValue'. Below these, there are search filters and a table of deals. The table has columns for 'APPLICANT (CO-APPLICANT)', 'ACTIONS', 'USER', and 'LOG'. One of the deals, 'Rate, Test', has a dropdown menu open under the 'Edit More' button, with 'Export Application to DMS' highlighted in a red box. Below the table, there are pagination controls and a legend for deal statuses.

APPLICANT (CO-APPLICANT)	ACTIONS	USER	LOG
Smith, John (Smith, Mary) FS Bank1: Declined	ADD FS Edit More		11/14 11:00 AM
Rate, Test DMS Bank1: Approved	Export Application to DMS	GMACTEST2	11/14 10:08 AM
schindler, kent UBank1: Prelim/Pend		BINDUDLR	11/14 9:24 AM
test, first (colts, indy)			11/14 9:21 AM
schindler, kent Bank3: Prelim/Pend		KY6-FGVY	11/13 4:44 PM
test, first (colts, indy) FS Bank5: Conditioned	ADD FS Edit More		11/13 11:18 AM
Tim, Tom FS Bank2: Conditioned	ADD FS Edit More		11/13 5:26 AM
TestL, TestF USABank2: Sending	ADD FS Edit More	BINDUDLR	11/12 5:44 PM

Number of records to display per page: 10 25 50 100

Approved Conditioned Declined Error Booked FS App from Finance Source
DMS App from Dealer Management System Sold Delivered New Message Read Message
Credit Report Run

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3. A RouteOne Export Options Screen will display.

DMS Export
LAMB, JOHN
 Vehicle: NEW 2004 SPECIAL COUPE Co-Applicant: CRAFT, JULIEX
 Transaction Type: Retail
 Amount Financed: \$24901

Export Application

USERNAME	EXPORT	TIME OF EXPORT
History Log		
ANTHONY123	✓	01/27/2005 - 3:37 PM

Export Application & Finance Source Information

4. Select one of the following:

Export Application Only: Selecting this option will allow you to export data entered in the RouteOne application (excluding any credit decision) to PBS Systems. If you selected **Export Application Only**, continue the export process by clicking the button.

Export Application and Credit Decision: Selecting this option will export data entered in the RouteOne application and select credit decision information to PBS Systems.

DMS Export
LAMB, JOHN
 Vehicle: NEW 2004 SPECIAL COUPE Applicant: CRAFT, JULIEX
 Transaction Type: Retail
 Amount Financed: \$24901

Export Application

Export Application & Finance Source Information

DECISION	USERNAME	EXPORT	TIME OF EXPORT
FINANCE SOURCE 1			
<input type="radio"/> APPROVED - 01/13/2005 - 9:35 AM	ANTHONY123	✓	01/27/2005 - 3:37 PM
<input type="radio"/> PRELIMINARY - 01/12/2005 - 5:10 PM			
FINANCE SOURCE 2			
<input type="radio"/> APPROVED - 01/12/2005 - 8:19 AM			
<input type="radio"/> PRELIMINARY - 01/12/2005 - 8:12 AM			

If you selected **Export Application & Finance Source Information**, continue the export process by clicking the radio button next to the decision you wish to export, and then click the button. Your exported deal is now available in PBS Systems.