



Integration Guide

RouteOne's innovative Dealer Management System (DMS) integration solution enables an exchange of credit application and credit decision information between RouteOne and your UCS system. Fields on the RouteOne credit application are populated with information obtained electronically from your UCS system, thereby eliminating duplicate data entry. Saved or sent applications in the RouteOne system can be easily imported and exported via your UCS system. In addition, the RouteOne UCS integration solution provides enhanced reporting on all F&I information extracted nightly from your UCS system. Closed or final deal information will automatically populate various performance reports in the RouteOne Dealer Reporting Suite.

Sending Deals from UCS to RouteOne

Importing a credit application from your UCS system to RouteOne is quick and easy! Credit applications can be imported from two different UCS applications, POWER FIN (Finance and Insurance) and POWER SPC (Sales Prospect Control).

1. Access your UCS application.
2. Open an existing deal/record in either POWER FIN or POWER SPC.
3. Click the Functions Menu and select Submit to Finance Source to import the deal to the RouteOne System.

POWER FIN

The screenshot shows the POWER FIN application window. The menu is open, and 'Submit to Finance Source' is highlighted. Below the menu, a table displays financial data:

Item	Qty	Unit Price	Description	Amount
12	15000.00	MSRP	23	55000.00
13	1500.00	JCL	24	TRADE CR
14	14000.00	SCL	25	TOTALS
15	190.47	AHM	26	SELL
16	1000.00	LEVEL	27	DOWN
17	1500.00	ACCESS	28	TAKES
18	2000.00	DLR ADDS	29	FEES
19	500.00	BASEMSRP	30	G.CAP
20		MO PMT	31	273.48
21	1000.00	MP TAX	32	11.99
22	4115	TTL PMT	33	285.47
23		\$FACTOR1		.3000
24		\$FACTOR2		
25		\$FACTOR3		
26		\$FACTOR4		
27		B.E.G.		1925.00
28		T.G.		5925.00

POWER SPC

The screenshot shows the POWER SPC application window. The menu is open, and 'Submit to Finance Source' is highlighted. The form displays prospect information:

Prospect # 256330 Name O'KEEFE, GEORGE
 Type Internet Source INTERNET Disposition
 Salesperson AVE

Disposition: [Dropdown]
 Tickle Date: 02/09/04
 Cell: (333) 555-4444
 Stock# 2ZB51556 Year 2002 Make BMW Model R1100S
 Order# [Field] Color BROWN Price [Field]


Setting User Permissions in UCS to Send Deals to RouteOne

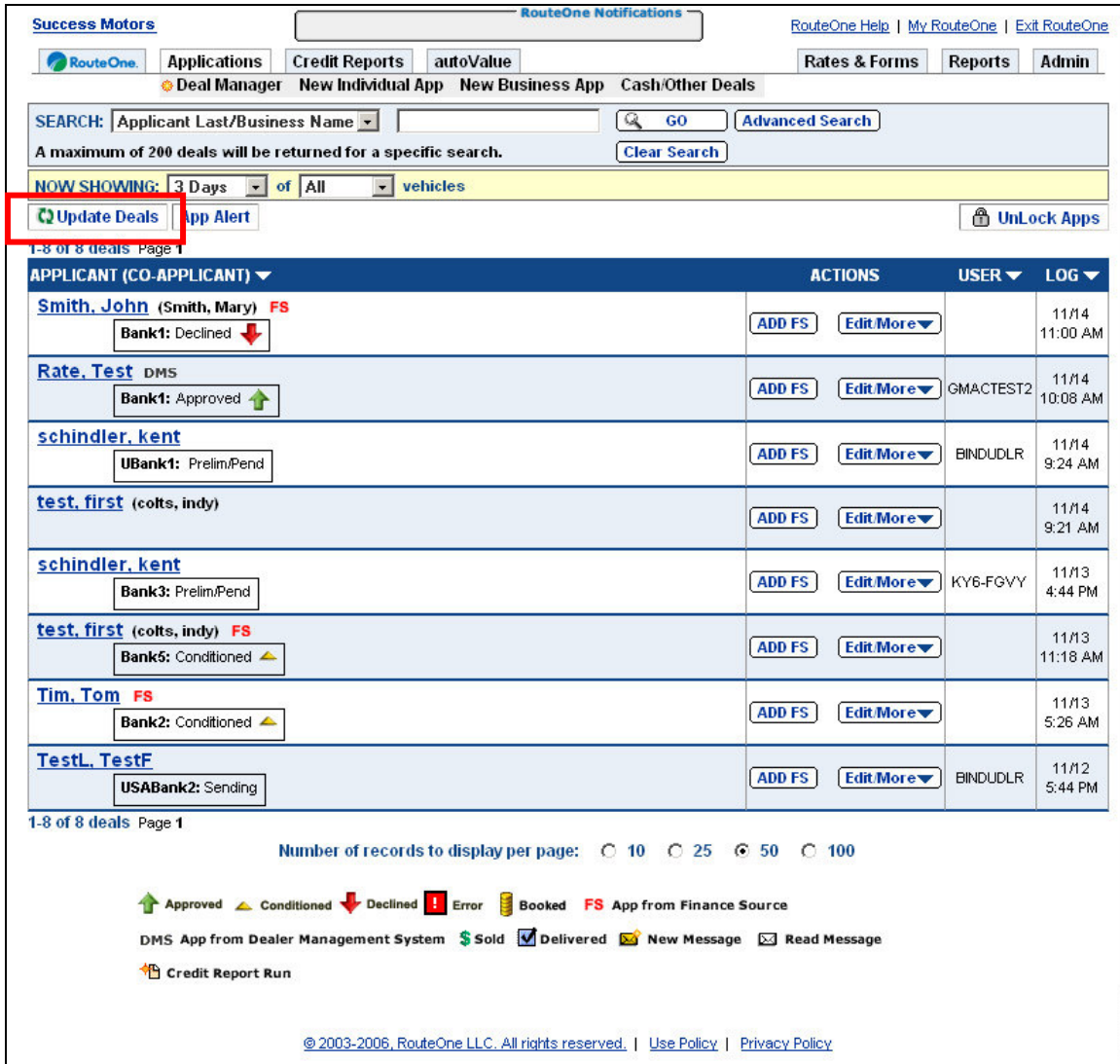
Dealer user permissions must be set within the UCS system so that deals can be sent to RouteOne.

1. Go to the Security Application (SEC) screen
2. Go to the Security Access sub-screen
3. Click on Finance and Insurance
4. Select Actions. Scroll down to 'Submit to Finance Source' and confirm that the box for that item is checked.

The screenshot displays the UCS Security Access interface. The 'Applications' list on the left includes 'Finance and Insurance' and 'Actions'. The 'Permission/Item' list on the right shows 'Submit to Finance Source' with a checked checkbox, highlighted by a red rectangle. Other permissions include 'Show Speed Value in Web Deal (ALT+L)', 'Unwind AFT Deal', 'Upload to Manufacturer', 'Validate Buyers (F3)', 'Verify Commissions (ALT+M)', 'Verify Mileage (F8)', 'View Aftermarket/Chargeback Deals', 'View All Multi-Quote Deals', 'View KeyTrak Display', 'Void AFT Deal (F7)', and 'Zero Deal Flow Action (ALT+Z)'. The 'Item Note' section contains the text: '(FIN Functions > Submit to Finance Source) Transmit credit applications to the RouteOne web site'. The user information at the bottom shows User ID AGUIRCA, Name AGUIRRE, CARLOS, Initials CA, Department N/C, and Class SLSMGR. The taskbar at the bottom shows the Start button, active windows for '(PRG - Home Page)', '(SEC - AGUIRCA 6...', and '(DCS - RT1) - POW...', and the system clock showing 1:55 PM.

Locating Imported Deals in the RouteOne Deal Manager

The *Deal Manager* is the hub of RouteOne. From here you can manage, locate, and review your deals. It is designed to help you quickly scan and check a deal's status using easy-to-read icons. Click the  [Update Deals](#) 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 'Applications', 'Credit Reports', 'autoValue', 'Rates & Forms', 'Reports', and 'Admin'. Below these is a search bar with a dropdown menu for 'Applicant Last/Business Name' and a 'GO' button. A note states 'A maximum of 200 deals will be returned for a specific search.' Below the search bar, there are filters for 'NOW SHOWING: 3 Days of All vehicles' and a red-bordered 'Update Deals' button. The main content is a table with columns for 'APPLICANT (CO-APPLICANT)', 'ACTIONS', 'USER', and 'LOG'. The table lists several deals with their respective bank statuses and actions. At the bottom, 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	ADD FS Edit More	GMCACTEST2	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

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

Legend: 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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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 UCS will populate the RouteOne credit application; however you must still complete all required fields **highlighted in yellow** and add at least one Finance Source before submitting the application.

Exporting Deals from RouteOne to UCS

The RouteOne UCS integration also allows you to export an application and Finance Source decision from RouteOne to your UCS system. All deals that have been imported to the RouteOne system from UCS will update the same deal number in UCS upon exporting the deal from RouteOne.

1. From the **RouteOne Deal Manager Screen**, click the on Edit/More button for the application you wish to export. Select 'Export Application to DMS'.

The screenshot displays the RouteOne Deal Manager interface. At the top, there are navigation tabs for 'RouteOne', 'Applications', 'Credit Reports', 'autoValue', 'Rates & Forms', 'Reports', and 'Admin'. Below these are sub-tabs for 'Deal Manager', 'New Individual App', 'New Business App', and 'Cash/Other Deals'. A search bar is present with the text 'SEARCH: Applicant Last/Business Name' and a 'GO' button. Below the search bar, it states 'A maximum of 200 deals will be returned for a specific search.' and a 'Clear Search' button. The main content area shows a list of deals with columns for 'APPLICANT (CO-APPLICANT)', 'ACTIONS', 'USER', and 'LOG'. The 'ACTIONS' column for the second deal, 'Rate, Test', has a dropdown menu open, and the option 'Export Application to DMS' is highlighted with a red box. Other options in the menu include 'Edit this Application', 'Remove Co-Applicant', 'Swap Applicant/Co-Applicant', 'View/Print Finance Source Decision', 'View/Print this Application', 'Credit Reports', 'Text Messages', 'Show all Copies of this App', and 'Copy this Application'. The bottom of the page features a legend for deal statuses (Approved, Conditioned, Declined, Error, Booked, FS) and a footer with copyright information: '© 2003-2006, RouteOne LLC. All rights reserved. | Use Policy | Privacy Policy'.

2. 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

3. 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 UCS system. 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 your UCS system.

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"/> PRELIMINRY - 01/12/2005 - 5:10 PM			
FINANCE SOURCE 2			
<input type="radio"/> APPROVED - 01/12/2005 - 8:19 AM			
<input type="radio"/> PRELIMINRY - 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 your UCS system.

RouteOne Dealer Reports

The RouteOne system can generate a variety of reports to help you better manage your business and identify opportunities to increase profits. Each night, RouteOne will retrieve a file from UCS detailing ALL of your dealership's closed or finalized deals. The next morning, when you login to RouteOne, you can run various performance reports including all your F&I activities and transaction details for extracted records, regardless of whether the deal originated in your UCS or RouteOne system. As a RouteOne UCS integrated dealer you have access to the following reports:

Finance & Insurance Log Report - Provides a comprehensive sales record, displaying relevant attributes for each sales transaction and totals/averages for the selected date ranges and input parameters. This report closely models many of the manual and automated F&I Logs used today.

		Total				New				Used					
	Total (\$)	Units	Pen%	Avg (\$)	PVR (\$)	Total (\$)	Units	Pen%	Avg (\$)	PVR (\$)	Total (\$)	Units	Pen%	Avg (\$)	PVR (\$)
Sales Gross	161,769.14	593		272.80		49,853.60	139		357.22		112,115.54	454		246.95	
Finance Reserve	97,624.90	185	31.2	528.78	164.97	32,269.93	82	59.0	392.80	231.73	65,614.97	103	22.7	637.04	144.53
Life Insurance	738.14	4	2.2	184.54	1.24	83.38	1	1.2	83.38	0.60	654.76	3	2.9	218.25	1.44
Disability Insurance	1,740.91	5	2.7	348.18	2.94						1,740.91	5	4.9	348.18	3.83
CI Total	2,479.05	9	4.9	275.45	4.18	83.38	1	1.2	83.38	0.60	2,395.67	8	7.8	299.46	5.28
GAP	31,910.00	68	36.8	469.26	53.81	7,125.00	15	18.3	475.00	51.26	24,785.00	53	51.5	467.64	54.59
Service Contract	32,720.00	61	10.3	536.39	55.18	10,471.00	22	15.8	475.95	75.33	22,249.00	39	8.6	570.49	49.01
GAP/SC Total	64,630.00	129		501.01	108.99	17,596.00	37		475.57	126.59	47,034.00	92		511.24	103.60
Accessories		31	5.2				23	16.5				8	1.8		
Plan		13	2.2				9	6.5				4	0.9		
Maintenance		4	0.7				4	2.9							
Road Hazard		3	0.5									3	0.7		
Total Other Products															
F&I Total	164,933.95				278.13	49,889.31			358.92		115,044.64				253.40
Lender		Units		%											
CAB WEST LLC		586		98.8											
FORD MOTOR CREDIT CO.		4		0.7											
DCFS TRUST		3		0.5											
Total Number of Deals / Sales		593		100.0											
<i>Lender summary includes deals with turnover indicator = N</i>															
<i>All summary calculations exclude deals with turnover indicator = N</i>															

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Decision Analysis (Time and Mix) Report - Allows you to monitor decision time and mix, by Finance Source, for your decided credit applications.



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Dealer Decision Analysis (Time & Mix)

RouteOne

Dealer: Success Motors - USA

Finance Source: All
Date Range 1: 07/21/2006 to 07/21/2006
Date Range 2:
New Used Demo: All
Transaction Type: All

 
Run On 08/03/2006
Run By Manavalan, J.

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Declined 07/21/2006 to 07/21/2006

FMCTst - All Decisions - (10 records returned)

Date	Customer Name	Veh. Make	Veh. Model	Veh. Year	H.U.D.	Trans. Type	Decision Time	Term	Payment	Advance %	Finance Balance	Buy Rate %	Cust. Rate %	Appl. Source	Decision Type
07/21/2006	John, Smith	Ford	Fusion	2006	New	Retail	1h 10m 25s	36	\$550	93	\$18,500	7.00	8.00	RouteOne	Approved
07/21/2006	George, Johnson	Ford	Fusion	2006	New	Retail	1h 9m 40s	36	\$550	93	\$18,500	7.00	8.00	RouteOne	Approved
07/21/2006	Joseph, Mathew	Ford	Fusion	2006	New	Retail	1h 8m 8s	36	\$550	93	\$18,500	7.00	8.50	RouteOne	Approved
07/21/2006	Ken, Nelson	Ford	Fusion	2006	New	Retail	1h 7m 36s	36	\$550	93	\$18,500	7.00	8.50	RouteOne	Conditioned
07/21/2006	Paul, Stanard	Ford	Fusion	2006	New	Retail	1h 6m 51s	36	\$550	93	\$18,500	7.00	9.00	RouteOne	Conditioned
07/21/2006	Greg, Swanson	Ford	Fusion	2006	New	Retail	13m 17s	36	\$550	93	\$18,500	7.00	9.50	RouteOne	Conditioned
07/21/2006	Rich, Hamilton	Ford	Fusion	2006	New	Retail	1h 6m 1s	36	\$550	93	\$18,500	7.00	9.50	RouteOne	Conditioned
07/21/2006	Smith, Adam	Ford	Fusion	2006	New	Retail	12m 29s	36	\$550	93	\$18,500	7.00	9.50	RouteOne	Declined
07/21/2006	Johnson, Kevin	Ford	Fusion	2006	New	Retail	11m 43s	36	\$550	93	\$18,500	7.00	9.50	RouteOne	Declined
07/21/2006	Peter, Simon	Ford	Fusion	2006	New	Retail	9m 23s	36	\$550	93	\$18,500	7.00	9.50	RouteOne	Declined

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Time Sales Analysis Report - Provides share analysis by Finance Source showing finance penetration both as a percentage of total vehicle sales as a percentage of finance contracts (available “time sales”).



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Dealer Time Sales Analysis (TSA)

RouteOne

Dealer: Geweke Ford - USA

Finance Source: All
Date Range 1: 07/01/2006 to 08/01/2006
Date Range 2:
New Used Demo: All
Transaction Type: All
Vehicle Year: All
Vehicle Make: All
Vehicle Model: All

 
Run On 08/03/2006
Run By Manavalan, J.

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Date Range 07/01/2006 to 08/01/2006

FMCTst - (6 records returned)

Date	Customer	Veh. Make	Veh. Model	Veh. Year	H.U.D.	R.L.B.
07/21/2006	George, Johnson	FORD	EXPEDITION	2006	New	Lease
07/21/2006	Greg, Swanson	FORD	F-150	2006	New	Retail
07/21/2006	John, Smith	FORD	FUSION	2006	New	Retail
07/21/2006	Joseph, Mathew	FORD	RANGER	2006	New	Balloon
07/21/2006	Ken, Nelson	FORD	TAURUS	2006	New	Retail
07/21/2006	Paul, Stanard	FORD	ESCAPE	2006	New	Retail

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