

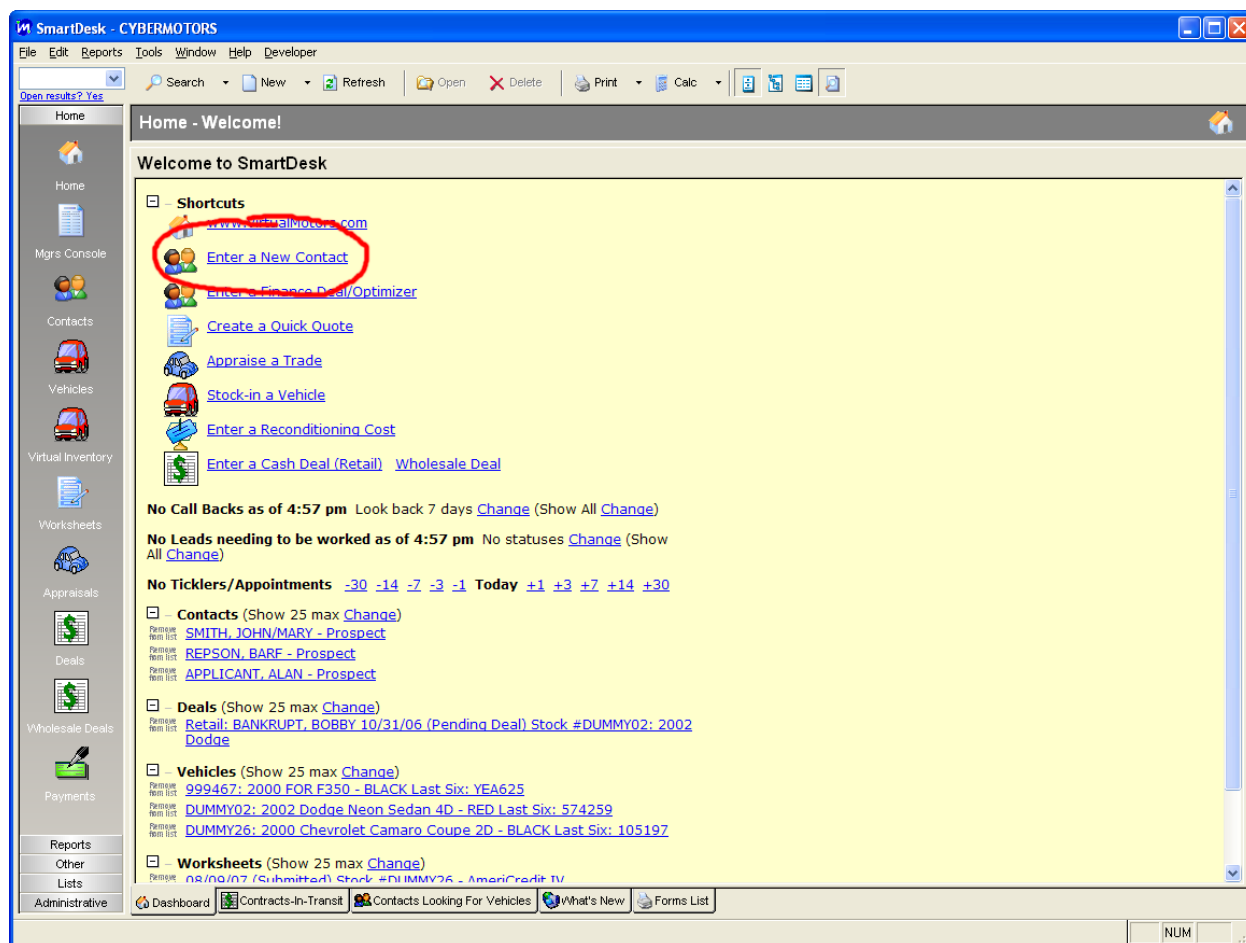
How to Submit a Deal from SmartDesk to RouteOne

Overview

The basic process involves creating a new contact and then a worksheet. The worksheet (containing the vehicle and deal structure information) is then submitted to RouteOne. After the deal application is in the RouteOne system, it can be forwarded to one or more lenders.

Steps

From the Dashboard, click on “Enter a New Contact.”



A blank contact form appears.

The screenshot shows a 'New Contact' window with a sidebar on the left containing a tree view of contact types (Main, Applicant, Co-applicant, etc.) and a list of actions (Print, Fax, Delete, Add, Search). The main form area is divided into several sections:

- Header:** Fields for Cust. #, SSN, First Name, MI, Last Name, Suffix, Date of Birth, Age, and Gender. The SSN field contains two asterisks (**).
- Applicant's Current Residence / Phones:** Fields for House No., Dir., Street Name, Type, and Apart. #. Below these are fields for Route, P.O. Box, City, State, and Zip. The County is set to California.
- Source:** A dropdown menu.
- Salesman:** A dropdown menu set to 'Tim Pau' with a checked 'Is Active' box.
- Status:** A dropdown menu with a checked 'Mailing List' box.
- Approved:** A field containing '//'.
- Appt/Tickler:** A field containing '//'.
- Alert Notes:** An empty text area.
- Set Alarm:** A dropdown menu set to 'At appointed time'.
- Call Back:** A field containing '//'.
- Notes:** A large empty text area.
- Reports:** A section with checkboxes for 'OFAC', 'ID Check', 'Equipfax', 'Experian', and 'TransUn'. Each has associated 'Score' and 'Coapp' fields, all showing 'N/A'.
- Last Chgd:** A field containing '//' and 'AM'.
- Buttons:** 'Save & Close', 'Save', and 'Revert'.

Enter the applicant's data (name, address, etc.).

This screenshot shows the same 'New Contact' window, but now with the applicant's data entered:

- Header:** SSN is filled with asterisks (*****). First Name is 'BILL', Last Name is 'SMITH', Date of Birth is '01/23/1978', Age is '29', and Gender is 'M'.
- Applicant's Current Residence / Phones:** House No. is '123', Dir. is 'NW', Street Name is 'MAIN', Type is 'ST', and Apart. # is empty. City is 'SAN JOSE', State is 'CA', and Zip is '95120'. County is 'SANTA CLARA'.
- Home:** (408) 555-1212
- Work:** (408) 555-1234
- Cell Ph:** (408) 555-1414
- E-mail:** billsmith99@yahoo.com
- Source:** Empty dropdown.
- Salesman:** 'Tim Pau' with 'Is Active' checked.
- Status:** Empty dropdown with 'Mailing List' checked.
- Approved:** '//'
- Appt/Tickler:** '//'
- Alert Notes:** Empty.
- Set Alarm:** 'At appointed time'.
- Call Back:** '//'.
- Notes:** Empty.
- Reports:** Same as the previous screenshot.
- Last Chgd:** '//' and 'AM'.
- Buttons:** 'Save & Close', 'Save', and 'Revert'.

Go to the Credit page.

New Contact

Contact: Main, Applicant, Co-applicant, Credit Bureau, Trade/Stips, **Credit**, The Optimizer, Worksheets, References, Notes

Print, Fax, Print Form Letter, Delete, Add, Search

Credit Criteria

Time

First-time Buyer Curr. Resid.: 0 Yr 0 Mo

Buying for Another Curr. Area: 0 Yr 0 Mo

Current/Prior BK

BK Dischrgd on // Current Job: 0 Yr 0 Mo

Prior Repo on // Same Field: 0 Yr 0 Mo

Multiple Repos

Self Employed In Bureau: 0 Yr 0 Mo

Military Rank: No. of Dependents:

Monthly Income and Debt **AmeriCredit I**

Gross Monthly Income:

Rent/Mortgage Payment: \$300

Current Car Payment:

Car Insurance: \$100

Installment/Revolving Debt:

Factor for Dependents: \$0 Min Bureau Score: 720

Total Monthly Debt: \$400 Max Pymt / Income: 20%

Debt / Income Ratio: ***% Max Debt / Income: 50%

Score: Auto-select Clear All Select All 0 Selected
 View selected only [Add Programs](#)

Program	Score	Payment
>> AmeriCd 1		
>> AmeriCd 2		
>> AmeriCd 3		
>> AmeriCd 4		
>> AmeriCd 5		
>> AmeriCd 6		
>> AmeriCd 7		
>> AmeriCd 8		
>> CPS Alpha		
>> CPS Alp +		
>> CPS FTB		
>> CPS Pref		
>> CPS Std		

Previous Next CYBERMOTORS "Optimizer" Mode Save & Close Save Revert

Ready Adding

Complete basic information like monthly income.

New Contact

Contact: Main, Applicant, Co-applicant, Credit Bureau, Trade/Stips, **Credit**, The Optimizer, Worksheets, References, Notes

Print, Fax, Print Form Letter, Delete, Add, Search

Credit Criteria

Time

First-time Buyer Curr. Resid.: 2 Yr 2 Mo

Buying for Another Curr. Area: 2 Yr 2 Mo

Current/Prior BK

BK Dischrgd on // Current Job: 4 Yr 0 Mo

Prior Repo on // Same Field: 0 Yr 0 Mo

Multiple Repos

Self Employed In Bureau: 0 Yr 0 Mo

Military Rank: No. of Dependents:

Monthly Income and Debt **AmeriCredit I**

Gross Monthly Income: \$3,000

Rent/Mortgage Payment: \$350 \$300

Current Car Payment:

Car Insurance: \$100

Installment/Revolving Debt: \$250

Factor for Dependents: \$0 Min Bureau Score: 720

Total Monthly Debt: \$700 Max Pymt / Income: 20%

Debt / Income Ratio: 23% Max Debt / Income: 50%

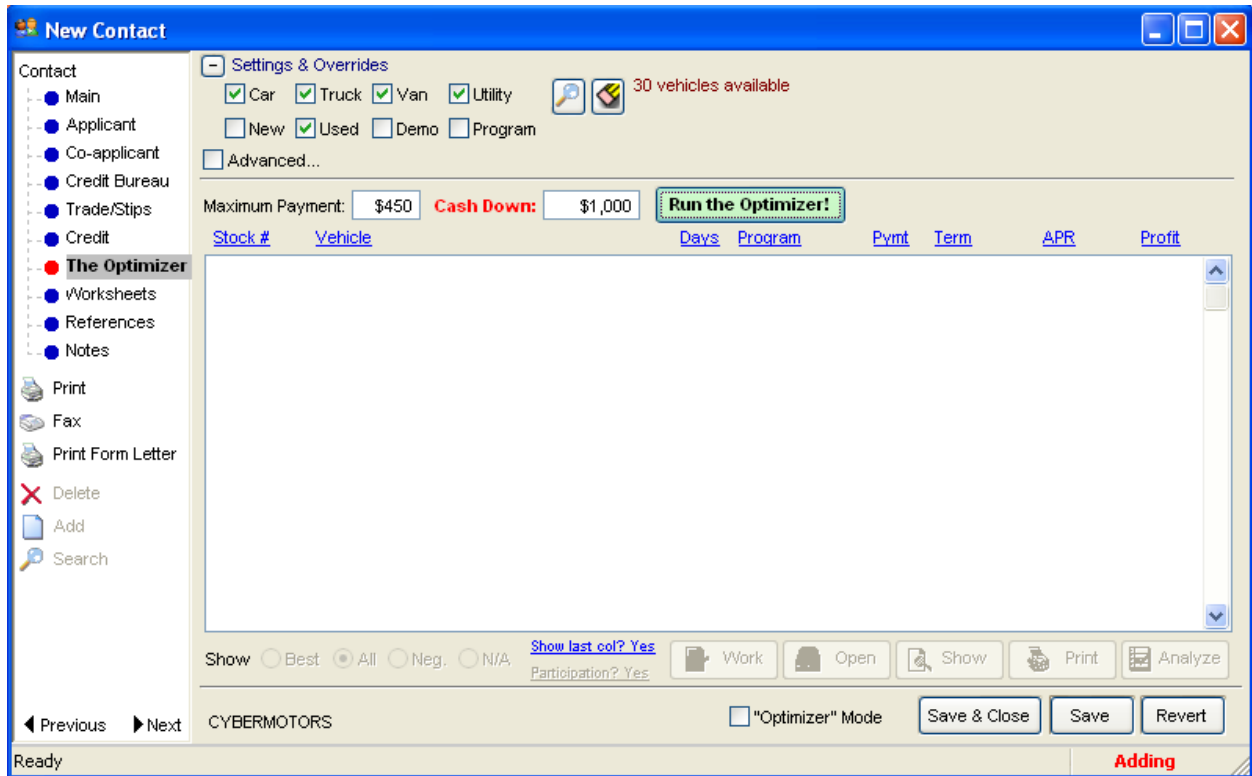
Score: Auto-select Clear All Select All 14 Selected
 View selected only [Add Programs](#)

Program	Score	Payment
>> AmeriCd 1	100	\$600
>> AmeriCd 2	100	\$600
>> AmeriCd 3	100	\$600
>> AmeriCd 4	100	\$600
>> AmeriCd 5	100	\$600
>> AmeriCd 6	100	\$600
>> AmeriCd 7	100	\$600
>> AmeriCd 8	100	\$600
>> CPS Alpha	100	\$599
>> CPS Alp +	100	\$599
>> CPS FTB	100	\$395
>> CPS Pref		
>> CPS Std	100	\$500

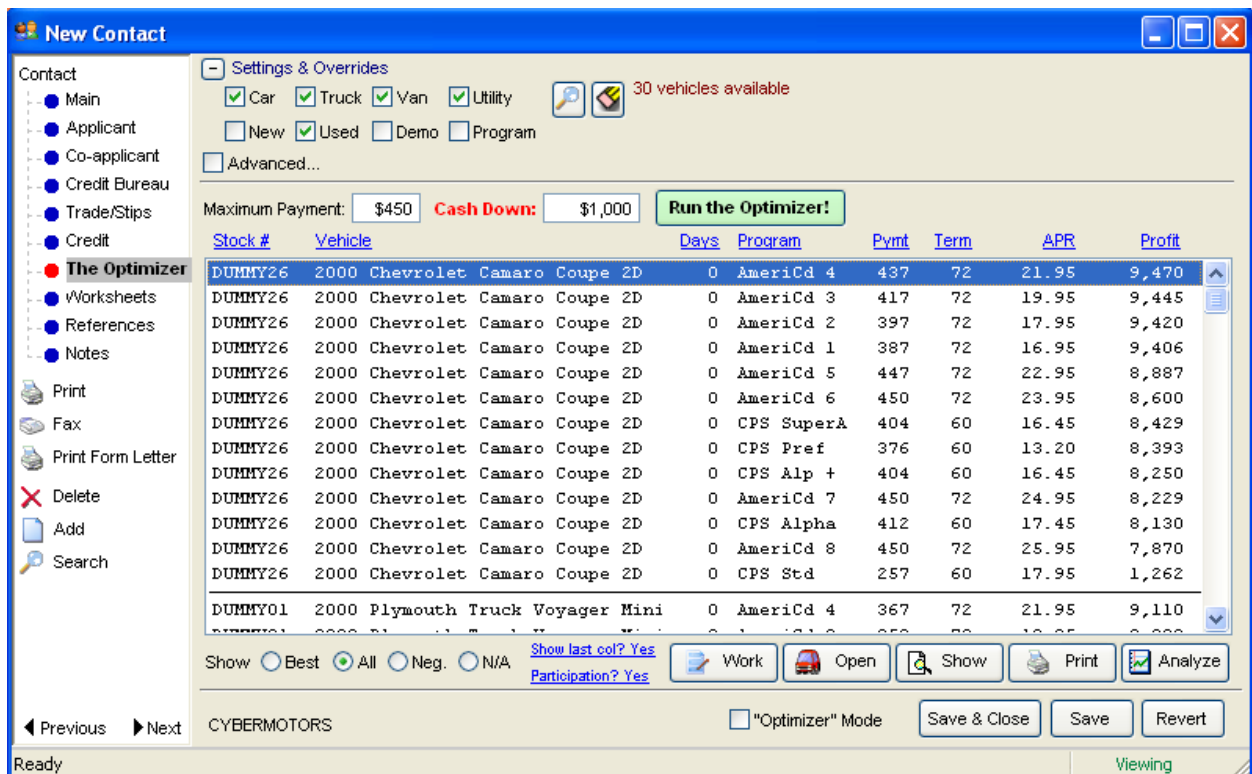
Previous Next CYBERMOTORS "Optimizer" Mode Save & Close Save Revert

Ready Adding

Go to the Optimizer page. Enter the maximum payment and down payment amounts. Click on the “Run the Optimizer!” button.



Select a vehicle, lender, finance combination in the list and click the “Work” button.



Work the numbers as necessary, then select "Save and Close"

BILL SMITH | AmeriCd 4 | DUMMY26: 2000 Chevrolet Camaro Coupe 2D

Worksheet: P / I Ratio: 15% D / I Ratio: 35% Available

Structure

- Products
- Recap
- Buyr/VehMisc

Print
Create Deal
Open Vehicle
RouteOne
Delete
Add
Search

Sell Price: \$16,740.74
 Allowance: \$0.00
 Trd Payoff: \$0.00
 Net Trade: \$0.00
 Used Car Rebate: \$0.00
 Cash Down: \$1,000.00
 Deferred Down: \$0.00
 Total Down: \$1,000.00
 Unpaid Cash Balance: \$15,740.74
 Miscellaneous: \$335.00
 Svc Contract + Non-taxable Products: \$0.00
 Other Taxable Products: \$0.00
 Total Tax: \$1,339.26
 Total Amt Financed: \$17,415.00 **Max**
 Period: Monthly Pymt: \$437.05
 APR: 21.950% Buy Rate: 19.950% Term: 72
 Days to 1st: 30 Due: 09/09/2007 Fin Chrg: \$14,052.60

Soft Adds / Car Insurance

Svc Con: \$0.00
 Gap: \$0.00
 Crdt Life: \$0.00
 A&H: \$0.00
 Bank-financed Car Insurance \$0.00
 Total of Soft Adds (without Product): \$0.00
 Customer's Car Insurance (not financed by bank): \$0.00

Miscellaneous

Doc Fee: \$295.00
 Title: \$0.00 Reg: \$0.00
 Filing: \$15.00 Lic: \$0.00
 Smog: \$25.00 Cert: \$0.00
 Tire: \$0.00 VSt: \$0.00
 Other Fee: \$0.00
 Loan Fee: \$0.00

Lender Parameters

Ignore Lender Parameters
 Kelley Wholesale: \$12,900.00
 Max Amount Financed: \$17,415.00
 Max Soft Adds + Misc:
 Max Amount Financed:
 Max Service Contract:
 Max Monthly Payment: \$450.00
 Min Monthly Payment:

Previous Next CYBERMOTORS Save & Close Save Revert

Ready Viewing

Go to the Worksheets page. Highlight the worksheet to send and click on the "RouteOne" button.

New Contact

Contact

- Main
- Applicant
- Co-applicant
- Credit Bureau
- Trade/Stips
- Credit
- The Optimizer
- Worksheets**
- References
- Notes

Print
Fax
Print Form Letter
Delete
Add
Search

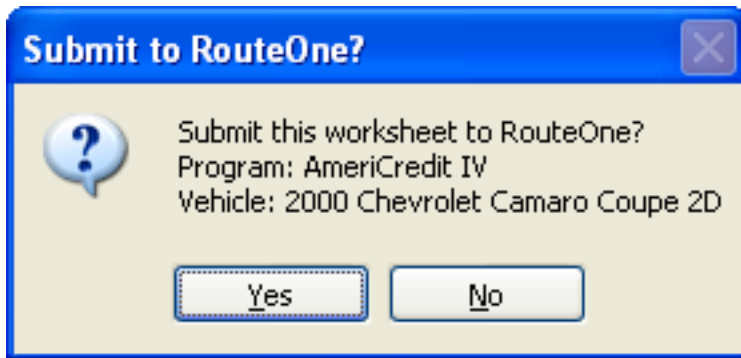
Max. Pymt: \$450 Quick Quote... Blank Worksheet...
 Cash Down: \$1,000 Select bank & vehicle Select vehicle only
 RouteOne...

Lender	Status	Pymt	Mo	Profit	Reserve	Stock #	Vehicle
AmeriCredit IV	Not Submitted	\$437	72	\$8,300	\$1,029	DUMMY26	2000 Chevrolet Camaro Coupe 2D

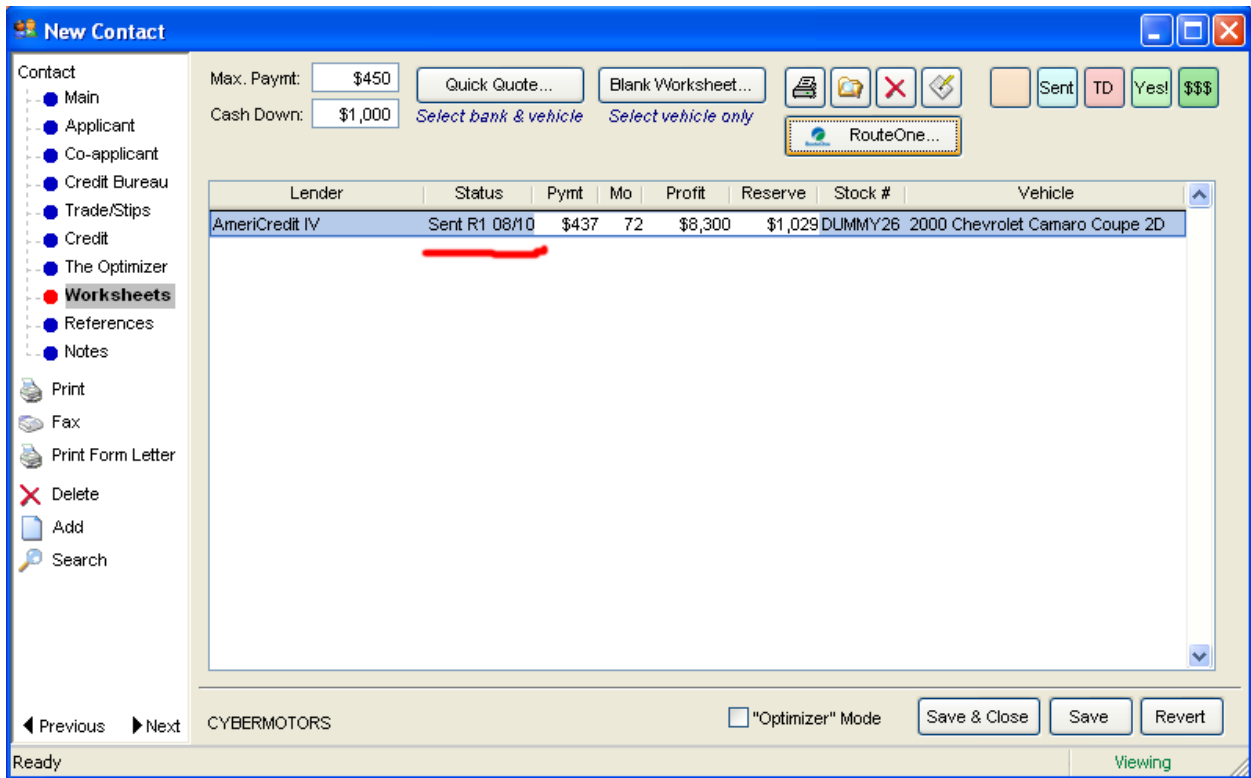
Previous Next CYBERMOTORS "Optimizer" Mode Save & Close Save Revert

Ready Viewing

Click on Yes to confirm sending the deal to RouteOne.



Note that the status of the deal has changed.



You can now login to the RouteOne, view the application, and send it on to a lender.

RouteOne Home | Participating Finance Sources | Participating Dealer Service Providers

Virtual Motors Test Dealership

RouteOne Notifications

RouteOne Help | My RouteOne | Exit RouteOne

RouteOne Deals New App Credit Reports autoValue Rates & Forms Reports

Deal Manager Contract Manager App Manager

SEARCH: Applicant Last/Business Name [] GO Advanced Search Clear Search

NOW SHOWING: 3 Days of All vehicles

Update Print App Alert UnLock

APPLICANT (CO-APPLICANT) ▼	ACTIONS	USER ▼	LOG ▼
SMITH, BILL (Virtual Motors)	ADD FS Edit/More		08/10 8:04 PM
SMITH, JOHN (Virtual Motors) W3R-O: Approved ↑ GMACTst: Approved ↑	ADD FS Edit/More	VMUSER1	08/09 2:19 PM
DOE, JOHN (SMITH, WILLIAM) (Virtual Motors) GMACTst: Approved ↑	ADD FS Edit/More	JOBYDLR	08/09 1:58 PM

1-3 of 3 deals Page 1

Note: A maximum of 201 deals will be returned for a specific search.

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

Internet 100%