

Integration Guide

The RouteOne SmartDealer integration enables one-way exchange of customer application information from your SmartDealer system to RouteOne. Fields on the RouteOne credit application can be populated with information obtained electronically from your SmartDealer system, thereby eliminating duplicate data entry.

Importing Deals from SmartDealer to RouteOne

Importing customer deal information from your SmartDealer system to RouteOne is quick and easy!

1. Open a lead form by double-clicking the lead.

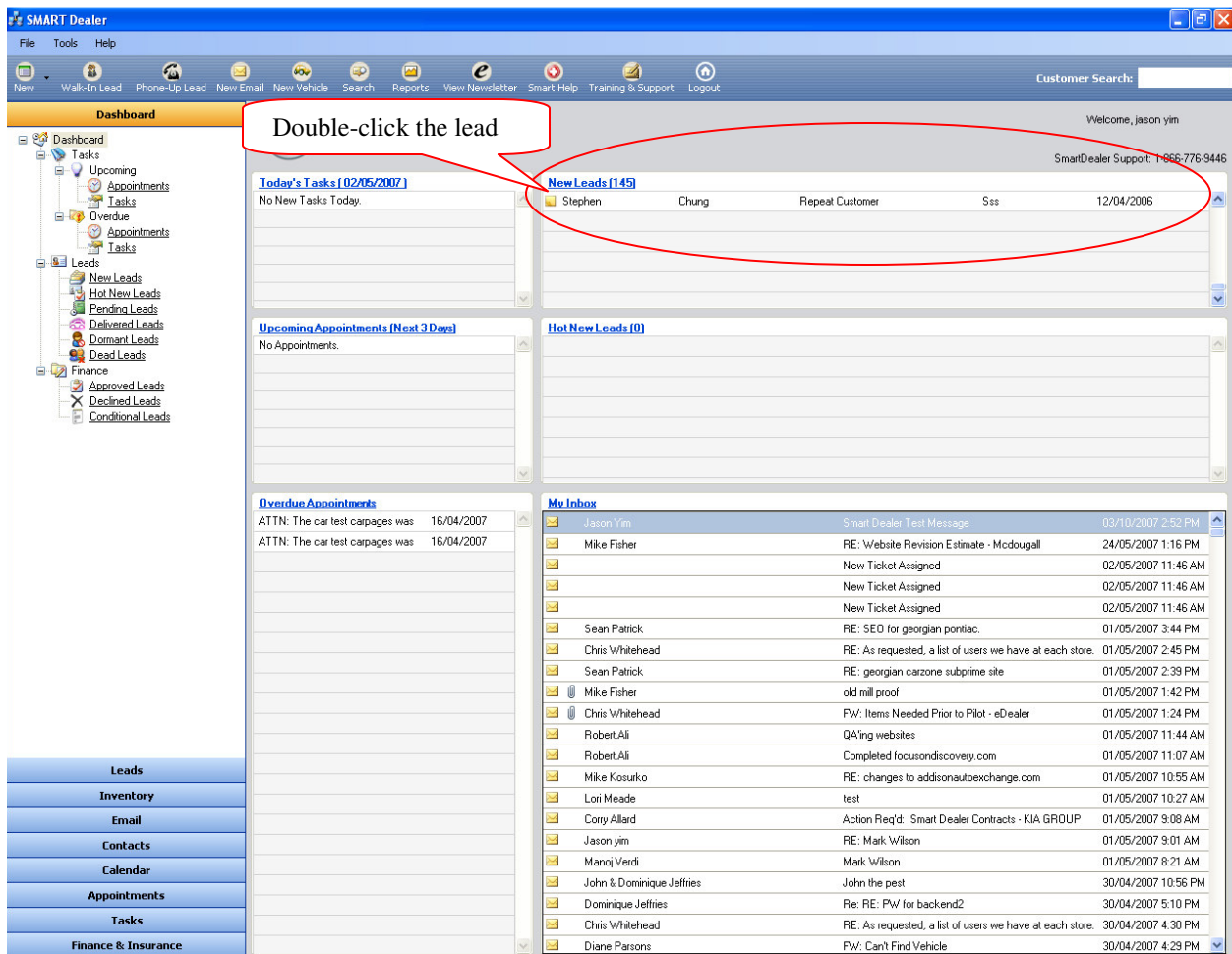


Figure 1 - Open up a lead form

2. Select the "Finance" tab.

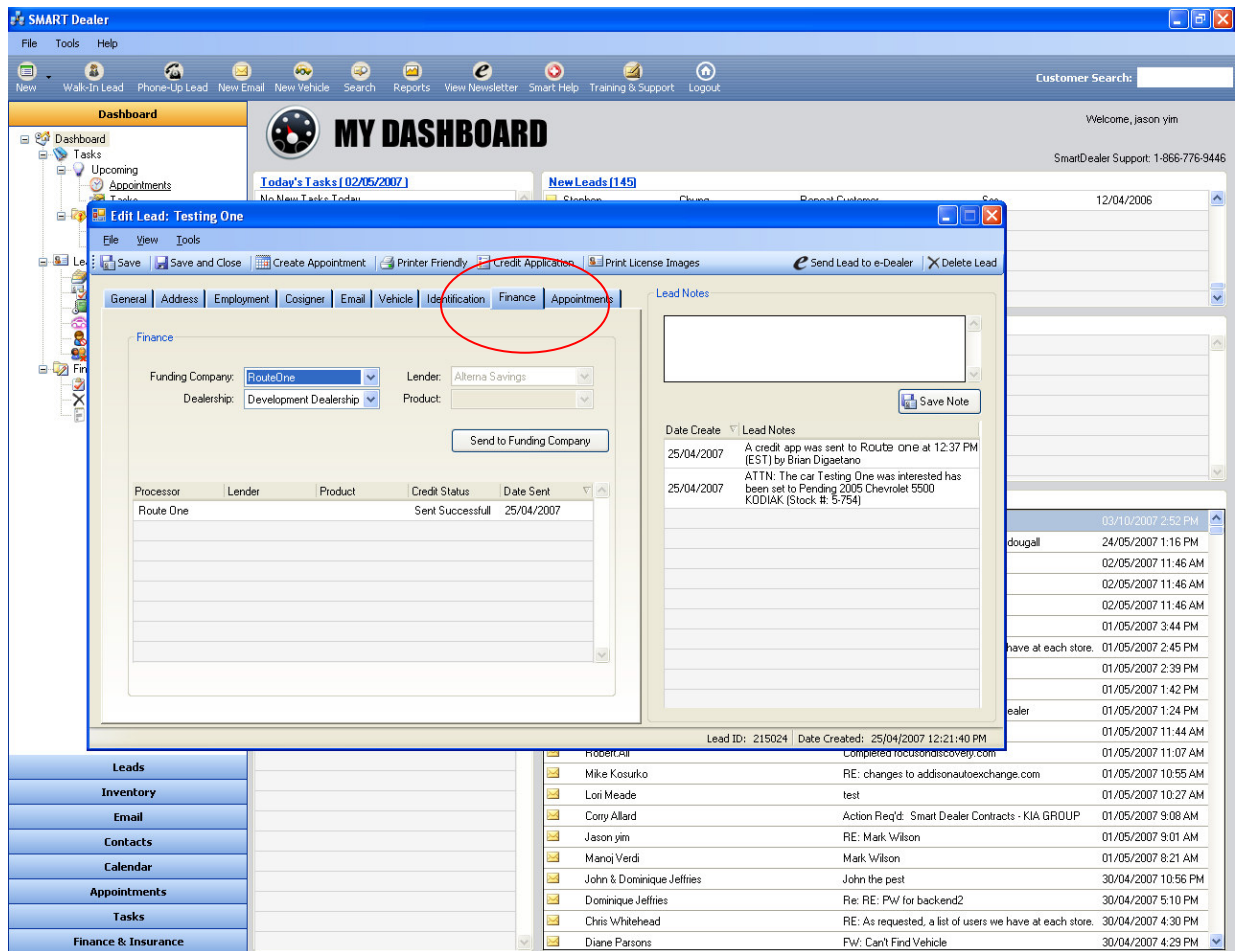


Figure 2 - Select the finance tab

From this lead form you can send the customer's credit application to a funding company of your choice. In this example we will be sending the information to RouteOne.

3. Select "RouteOne" from the Funding Company drop-down list.
4. Select the dealership you wish to send from the Dealership drop-down list.
5. Click "Send to Funding Company".

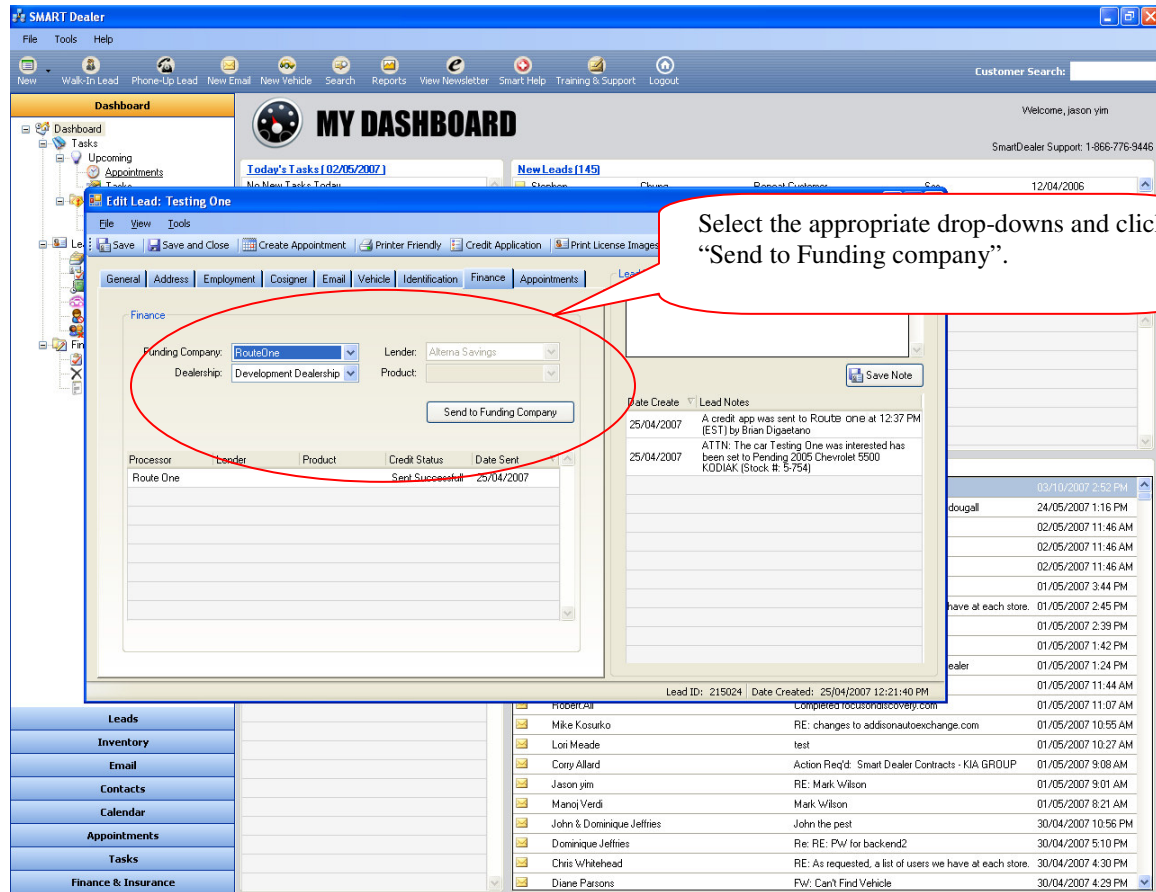



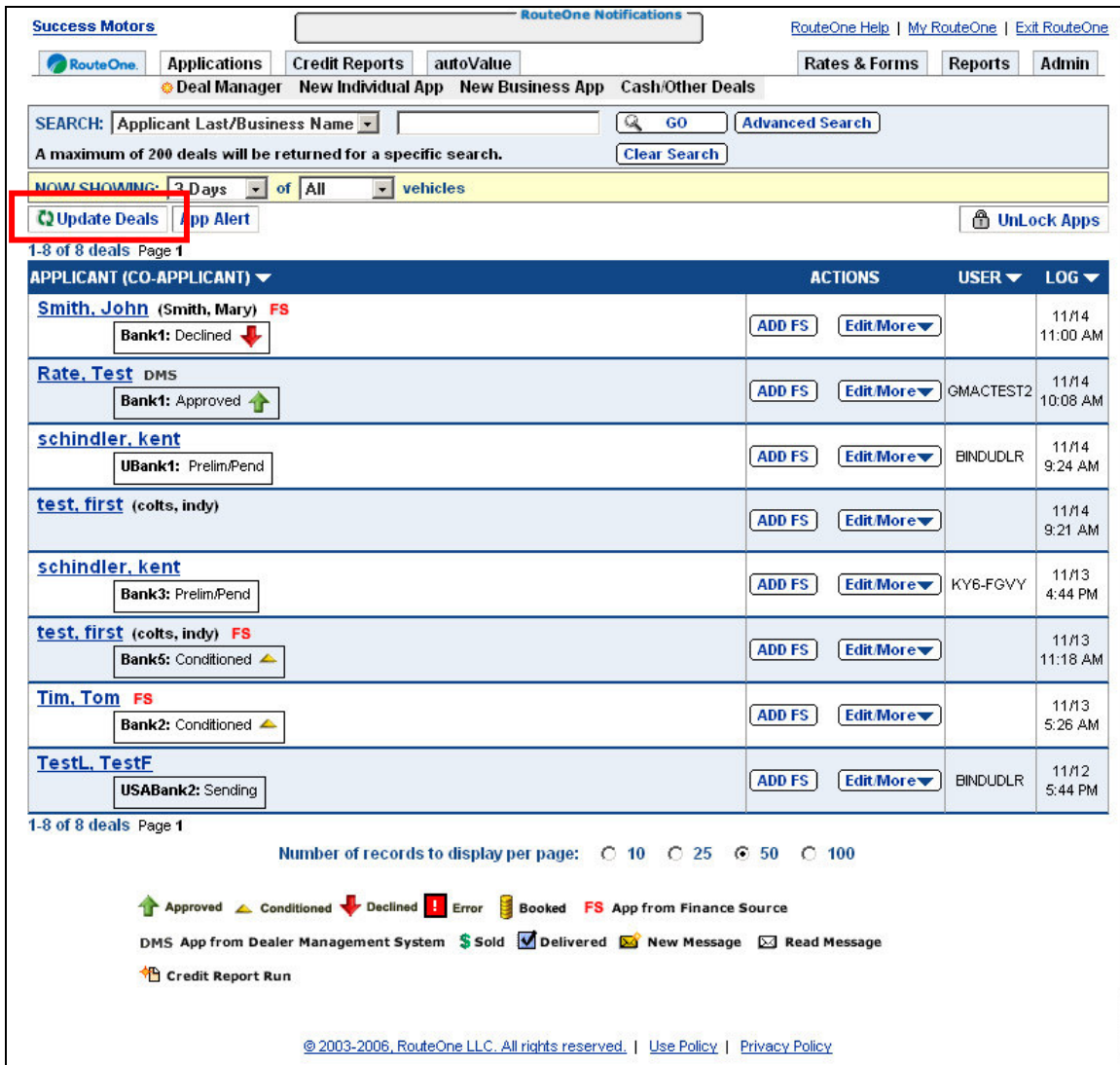
Figure 3 - Sending the information to RouteOne

Notes:

- A lead note will be automatically generated on the right hand side with a date, time, and user stamp.
- Smart Dealer will perform validation checks to ensure that the data being sent is accurate and in the proper format. If any required information is missing or in the incorrect format, Smart Dealer will NOT send the information to RouteOne and will notify the user with a message pop-up informing customer of what changes are required.

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 denoted with the **DMS** icon next to the primary applicant's name.



The screenshot shows 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 red box highlights the 'Update Deals' button in the 'NOW SHOWING' section. The main area displays a table of deals with columns for 'APPLICANT (CO-APPLICANT)', 'ACTIONS', 'USER', and 'LOG'. The first row shows 'Smith, John (Smith, Mary) FS' with a 'Bank1: Declined' status and a red arrow icon. The second row shows 'Rate, Test DMS' with a 'Bank1: Approved' status and a green arrow icon. The table also includes a legend for deal statuses and a footer with copyright information.

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	GMATEST2	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 SmartDealer 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.