Appendix L RouteOne

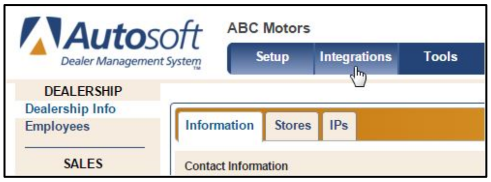
The RouteOne integration allows you to transmit deal information to the RouteOne Website. You will then log in to the RouteOne Website, make any additions or changes, and submit the credit application or eContract.

RouteOne Integration Setup Verification

An Autosoft Customer Support Center representative will establish the integration between your dealership's FLEX DMS F&I account and RouteOne. However, you may wish to verify your FLEX DMS F&I program is set up to transfer deal information to RouteOne prior to your first use of the integration. This includes verifying your RouteOne ID number is added to the RouteOne integration setup. This is the ID number RouteOne assigned your dealership when you established an account with the third party. This is also where you will choose to use the single sign-on feature available for RouteOne.

1. Click the **Admin** link in the top right corner of the screen above the blue navigation bar.

2. Click the **Integrations** tab in the blue navigation bar.



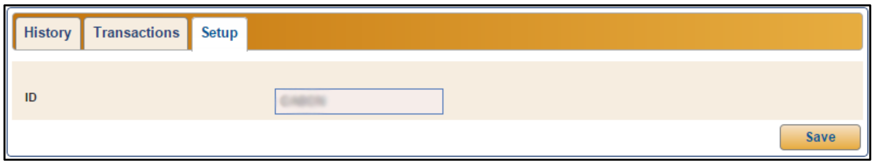
3. If the RouteOne integration has been activated for your FLEX DMS F&I account, RouteOne will appear in the Integrations list in the left column. Click **RouteOne**.

4. Click the **Transactions** tab and check to see that **RouteOne Credit Application**, **RouteOne SSO**, and **RouteOne EContract** are checked.

Note: The RouteOne Inbound and RouteOne F&I Log integrations are in development. Autosoft will provide additional information when these integrations are available for use.

5. Click the **Setup** tab.

6. Check that your dealership's RouteOne ID is entered and correct.



7. Click **Save**.

Employee Setup

You can add usernames for each employee who is permitted to access RouteOne. Adding the username in the employee's setup allows the employee to use the RouteOne single sign-on feature. Instead of typing the username and password, the program will automatically pull the username from the employee's file and use it to sign in to RouteOne.

1. Click the **Admin** link in the top right corner of the screen above the blue navigation bar.

2. Click the **Setup** tab in the blue bar at the top of the screen.

3. Click **Employees** under the Dealership heading in the left navigation panel.

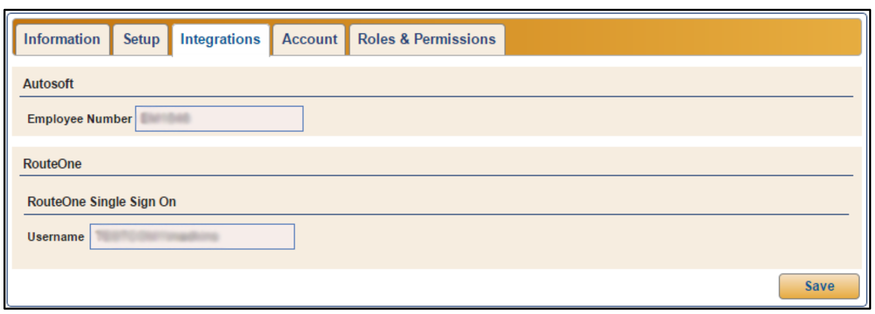
4. A list of the dealership's employees will open.

5. Select an employee from the list by clicking on his or her name.

6. The employee's information populates the screen below the list.

7. Click the **Integrations** tab.

8. Autosoft provides a unique single sign-on username based on the employee's FLEX DMS F&I username. Check to see that it appears in the RouteOne section of the tab under RouteOne Single Sign On and click **Save**.



Tip: If an employee's FLEX DMS F&I login name is longer than 11 characters, it will not be appropriate for use as a RouteOne single sign on username. You will not be able to edit the single sign on username in the **Integrations** tab. However, you can edit the employee's FLEX DMS F&I login name in the **Account** tab so it is 11 or fewer characters and will work when used to create the RouteOne unique username. For directions on how to do this, see the "Employees" section of *Chapter 1 System Setup*. **If you alter an employee's FLEX DMS F&I login name, be sure to alert the employee to prevent any difficulties logging in.**

9. Repeat steps 3 through 8 for each employee who will use RouteOne.

Single Sign-On Setup

FLEX DMS F&I provides integration for the use of RouteOne single sign-on functionality. Following an initial, one-time setup, RouteOne single sign-on will allow your employees to quickly and easily access the RouteOne Website directly from FLEX DMS F&I with the click of a mouse.

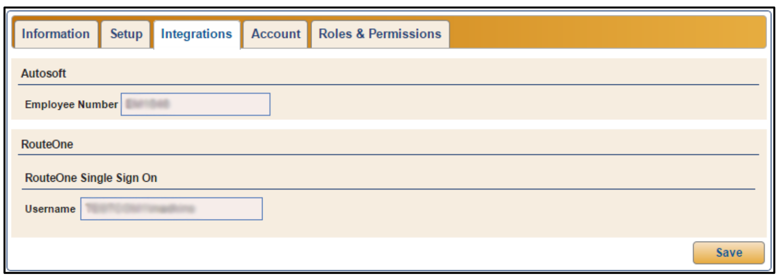
1. Click the **Admin** link at the top right corner of the screen above the blue navigation bar.

2. Click on **Employees** under the Dealership heading in the left navigation panel.

3. A list of employees will open. Locate the employee you wish to setup with single sign-on. Click on the employee's name.

4. The employee information populates a box below the list. Click on the **Integrations** tab.

5. If the RouteOne integration has been activated for your FLEX DMS F&I account, you'll see a section titled "RouteOne" under the **Integrations** tab. In the RouteOne section, you'll see the **RouteOne Single Sign On** section's **Username** field. Copy this username, which you'll paste into RouteOne in future steps for the initial setup.

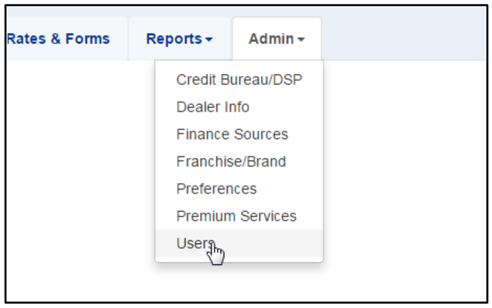


6. Open another tab in your Web browser and type the RouteOne Website URL (www.routeone.net). Log in to RouteOne using the **User ID** (**Username** in FLEX DMS F&I's RouteOne Single Sign On section for employee) and **Password** assigned to you by RouteOne.

Tip: Only users with Admin access in RouteOne will be able to configure users for single sign on functionality.

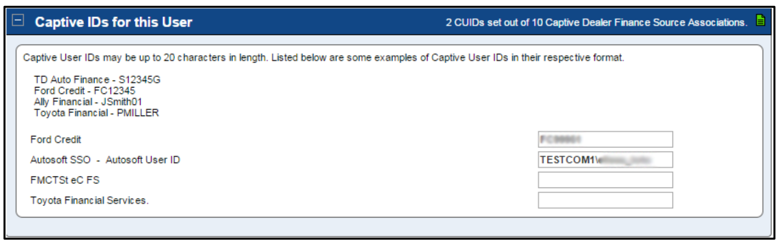
7. Click on the **Admin** tab at the top of the RouteOne homepage to open a drop-down menu.

8. Select **Users** from the drop-down menu.



9. A list of your dealership employees with access to RouteOne will open. Select a user from the list and click the **Edit** button on that user's line.

10. In the **Captive IDs for this User** section, paste the unique single sign-on username into the **Autosoft SSO – Autosoft User ID** field.



11. Click the **Save Information** button at the bottom of the page.

12. The user will receive an email notification at the email address entered in the **User Information** section on RouteOne. The email message will contain a Token ID number that the user will have to enter the first time he or she uses single sign-on.

13. Repeat steps 7 through 11 for all dealership employees who will need access to the RouteOne single sign-on feature.

Single Sign-On Activation

Once the dealership administrator has completed single sign-on (SSO) setup for a RouteOne user, the user will receive an email from RouteOne containing a Token ID number he or she must use to activate the single sign on feature for his or her account.

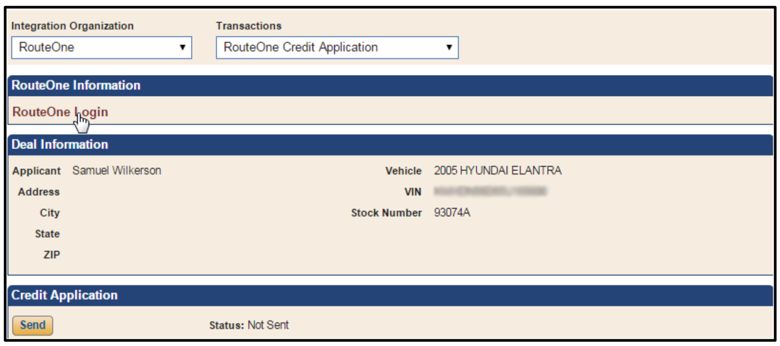
1. In FLEX DMS F&I, navigate to an established deal in the **Deals** tab or create a new deal.

2. Once in the deal, click **Integrations** in the left navigation panel.

3. Select **RouteOne** in the **Integration Organization** drop-down menu.

4. Choose either **RouteOne Credit Application** or **RouteOne EContract** from the **Transactions** drop-down menu.

5. Click the **RouteOne Login** link within the **RouteOne Information**.



6. The RouteOne login screen will open, and you will be prompted to enter the Token ID number that you received via email from RouteOne. **You will only have to enter this information the first time you use the SSO functionality.**

   After your initial use of SSO, you will merely click the **RouteOne Login** link in the **Integrations** area when working a deal. You will not have to enter any RouteOne login credentials.

7. Once you are logged in to the RouteOne Website, review the deal information, make any necessary changes, and add any additional information as needed. See “Submitting Credit Applications” and “Submitting Deals for E-Contracting” for detailed instructions.

Tip: If the username in the employee’s file is incorrect, the login will fail, and the employee will be directed to a page indicating the page he or she requested was not found. If an employee sees this page, the dealership’s FLEX DMS F&I administrator should verify the username in the employee’s file is correct. If a user arrives at this error page but the username is correct, contact RouteOne to identify the login issue.

Submitting Credit Applications

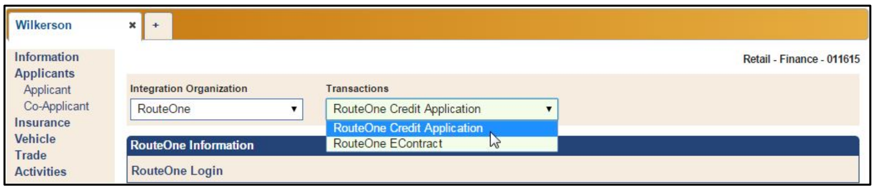
You will use the **Integrations** link on the deal menu to transfer the deal information. This process simply transfers the deal information to RouteOne. You must log in to the RouteOne Website or use the single sign-on function to complete and submit the application.

1. Open an existing deal or create a new deal.

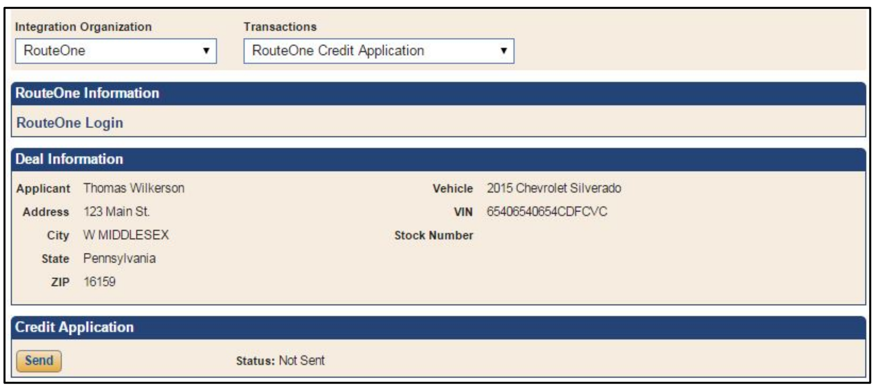
2. Click **Integrations**.

3. Select **RouteOne** in the **Integrations Organization** list.

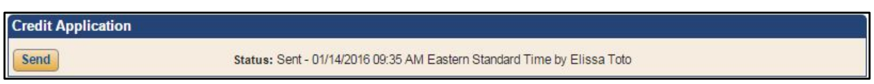
4. Select **RouteOne Credit Application** from the **Transactions** drop-down menu.



5. Click **Send**.



6. You will see a green Success message when the information has been sent, and the status will change from “Not Sent” to “Sent,” followed by the time stamp for the transfer.



   If the information contains errors, the status will display as “Rejected,” followed by the time stamp for the transfer, and the program will display an error message identifying the information that must be corrected. Correct the information and send the deal again.

Submitting Deals for eContracting

Dealerships employing Autosoft's FLEX DMS F&I have the ability to send a credit application from FLEX DMS F&I to the RouteOne Website. From there, the user will submit the application to the lenders. Once a lender buys the contract, the F&I user will finalize the deal in FLEX DMS F&I, applying the lender information, adjusting the APR, selling back-end products, etc.

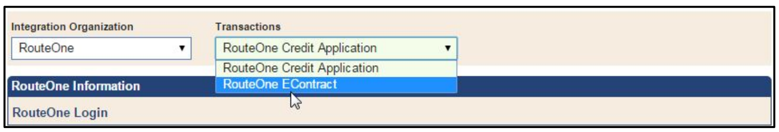
The following process assumes that the dealership has already fully desked the deal and is ready to submit the finalized deal to the RouteOne Contracts module for the processing of the eContract.

1. Open a deal.

2. Click **Integrations** in the left navigation panel.

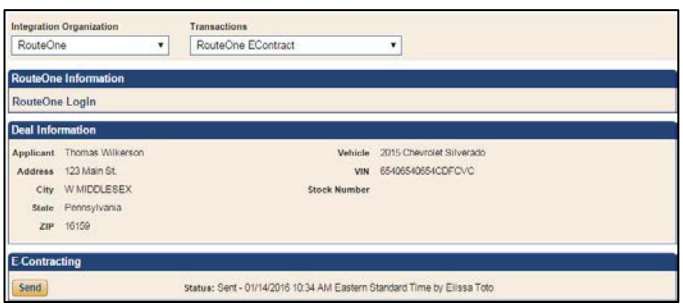
3. Select **RouteOne** from the **Integration Organization** drop-down menu.

4. In the **Transactions** field, select **RouteOne EContract** from the menu.

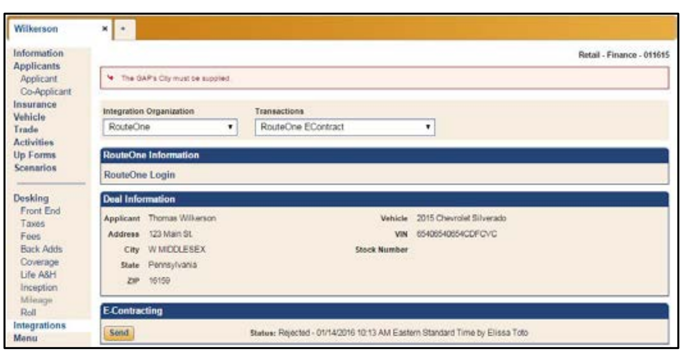


5. In the **E-Contracting** section, click **Send**.

6. The transaction will display as "Sent," followed by the time stamp for the transaction.

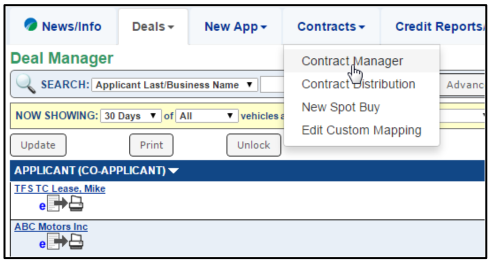


If the information contains errors, the status will read, "Rejected," followed by the time stamp for the transfer, and the program will display an error message identifying the information that must be corrected. Correct the information and resend the deal.



7. Click **RouteOne Login** in the **RouteOne Information** section to connect to the RouteOne Website.

8. Once logged in to the RouteOne site, click **Contracts** and click on **Contract Manager** from the drop-down menu.



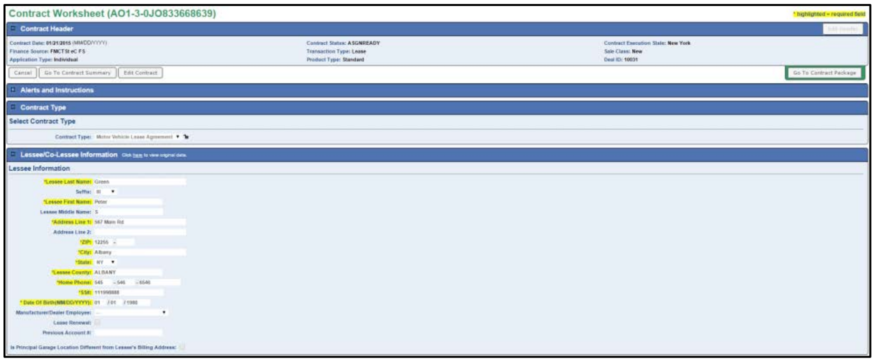
9. The Contract Manager screen will open and display a list of deals you've submitted from FLEX DMS F&I.

10. Click on the contract you wish to process electronically.

Important: The first time you use this integration to create an eContract, you will be prompted to complete DMS mapping. Because RouteOne may use different names for some contract fields than FLEX DMS F&I or your dealership, DMS mapping allows you to match up your licensing fees and local charges with the appropriate fields in RouteOne's eContracting application. You will only need to do the DMS mapping once, and it will be applied to all future eContracts you create with RouteOne. Once mapping is complete and defaults have been established, only users with Admin access can modify the default settings.

RouteOne will warn the user if a field from the FLEX DMS F&I deal does not match any of the RouteOne eContracting fields and ask that the user map the field. For fields that will be identical in every contract, such as fees, you can lock the field to ensure the data you map to it is consistent in every contract.

11. The Contract Worksheet opens. The fields highlighted in yellow are required by RouteOne. The integration will auto-populate all the required fields with information from FLEX DMS F&I to complete the eContract.



12. Review the information to verify that the numbers are correct. If the eContract payment does not match the FLEX DMS F&I-calculated payment, be sure to enter the FLEX DMS F&I payment on the Contract Worksheet screen and verify.

13. Populate the eContract and have the customer sign.