CREDIT APPLICATION AND ECONTRACTING

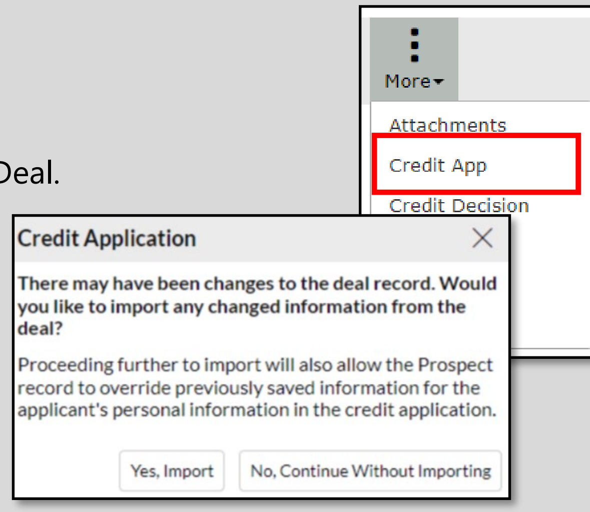
Administrator

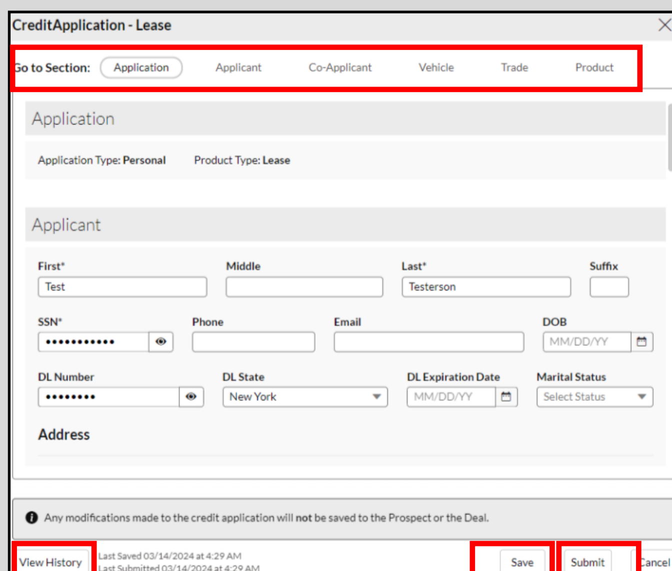
- Complete the activation sheet for integration between Dominion VUE and RouteOne. Contact Dominion Support to request a RouteOne integration form. If your dealership has multiple RouteOne IDs, the form must be completed for each ID.
- For RouteOne eContracting, please refer to the last page of this document for the Single Signing Criteria.

CREDIT APPLICATION - Within VUE

Sales and F&I

1. Navigate to Sales > F&I > Sales Desk or Deals
2. Filter/Sort the primary grid to locate the Sales Desk or Deal.
3. Click to select the corresponding line for the Sales Desk or Deal.
4. Hover over the **More** icon in the Action Ribbon and select [**Credit App**] from the drop down.
5. You are prompted to update the credit application with information from the Prospect and Deal screens. To proceed to the application, select [Yes] to import or [No] to to not import. NOTE: Based on your selection, required fields could be altered preventing the application from being submitted.
6. Update the Credit Application as needed. The tabs at the top of the Credit Application modal allow for quick navigation to the Applicant, Co-Applicant, Vehicle, Trade, and Product tabs. Asterisks indicate required fields.
7. The [Save] button only saves the information to the application, and the [Submit] saves and submits the application. NOTE: The [Submit] button appears once all required fields are completed.

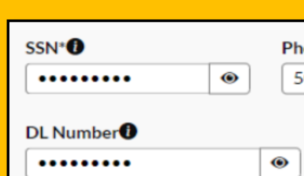




Pro Tip -

The SSN and Driver's License fields offer a show/Hide icon. Permissioned users can toggle between Show and Hide, as well as add and edit the SSN and DL fields.

Users without permissions may not toggle, but they can enter a new SSN or DL to change it until the [Save] button has been selected.

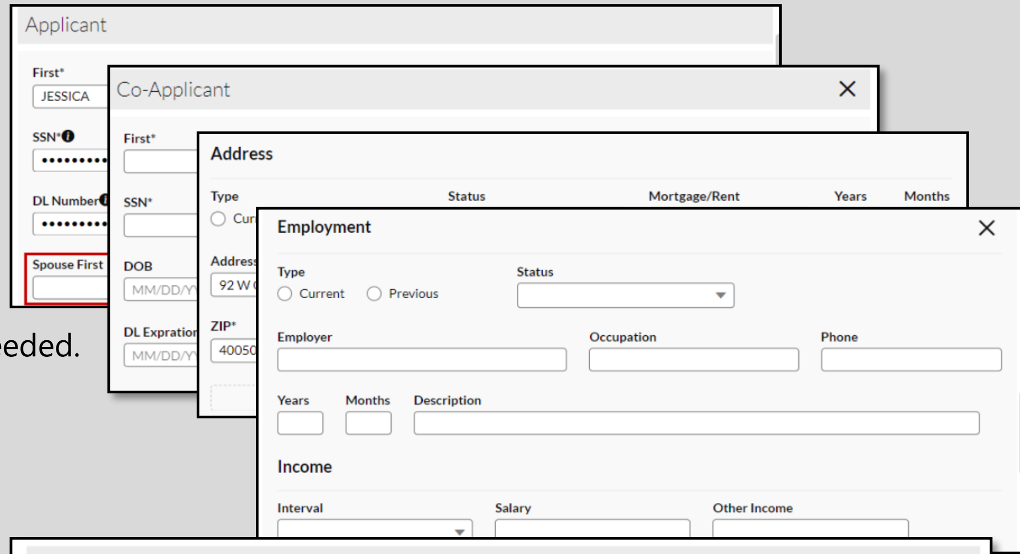


CREDIT APPLICATION

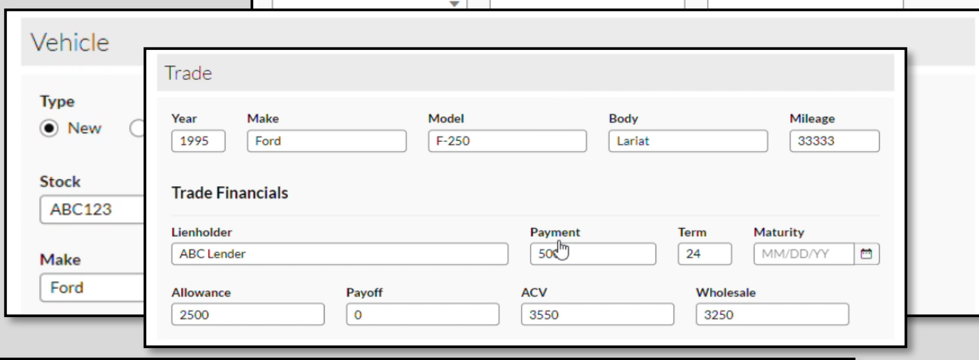
Applicant data, Co-Applicant, Addresses, Vehicle and Trade

Details are populated from the Prospect and Deal screens. Some fields are display only if they are relevant to the application.

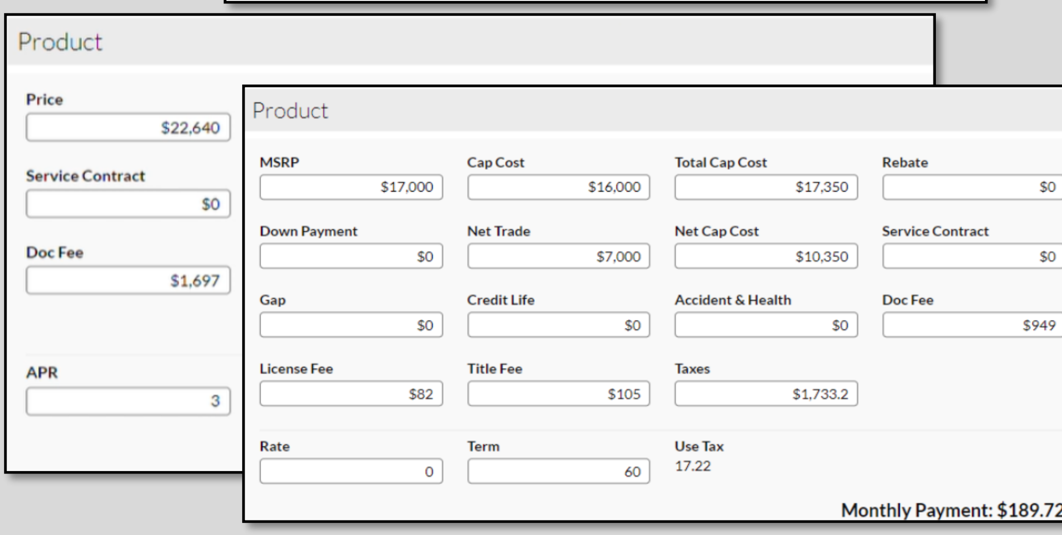
Employment and address history can be manually entered into the applicant sections as needed.



Product - Calculated fields are updated based on other values and are not directly editable within the Credit Application modal.



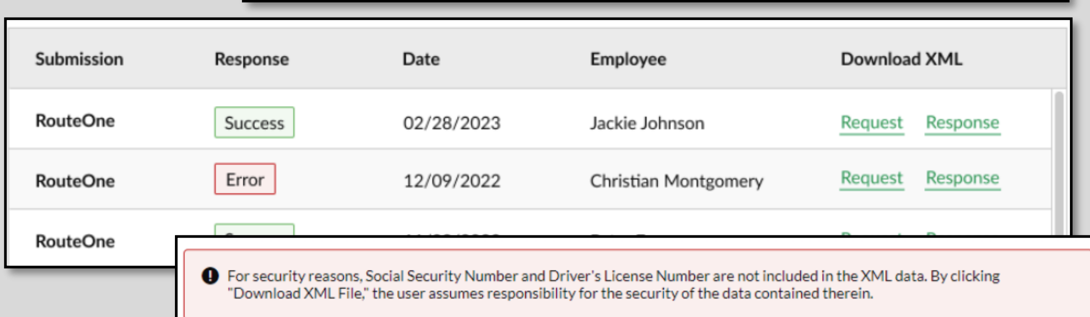
Important - Changes made in the Product section DO NOT update the Deal. They are only used for the Credit Application.



History - The History button appears after submitting a Credit Application to RouteOne.

Use the hyperlinks in the Action column to download the XML data.

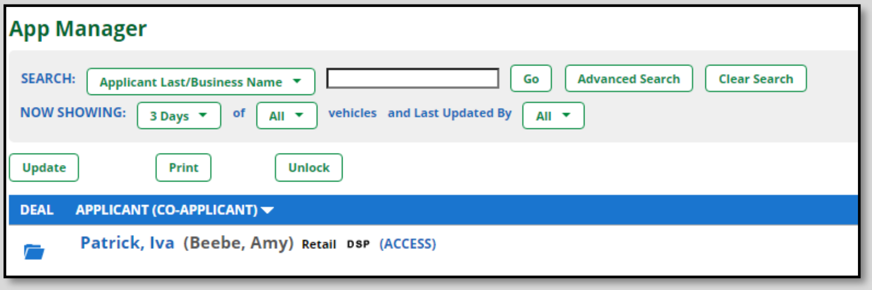
SSN and DL information are not included in the XML data.



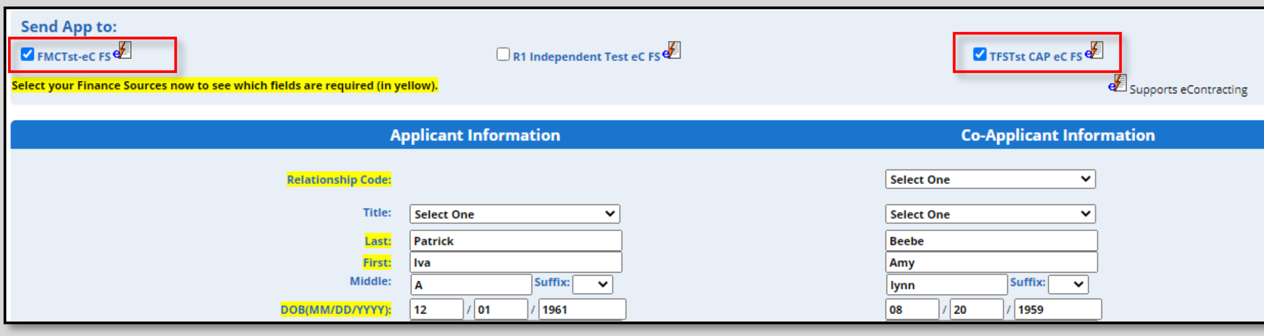
CREDIT APPLICATION - Within RouteOne

Sign into RouteOne (www.routeone.net) once the credit application has been sent from VUE.

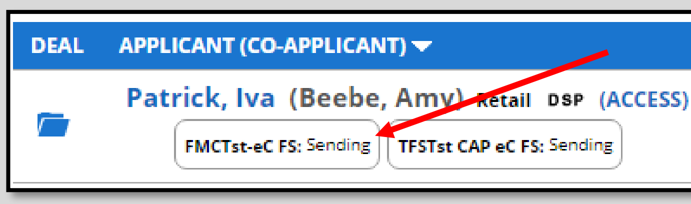
1. Hover over the **Deals** tab and click **App Manager**.
2. Click the customer name hyperlink in the Applicant grid to open the application.



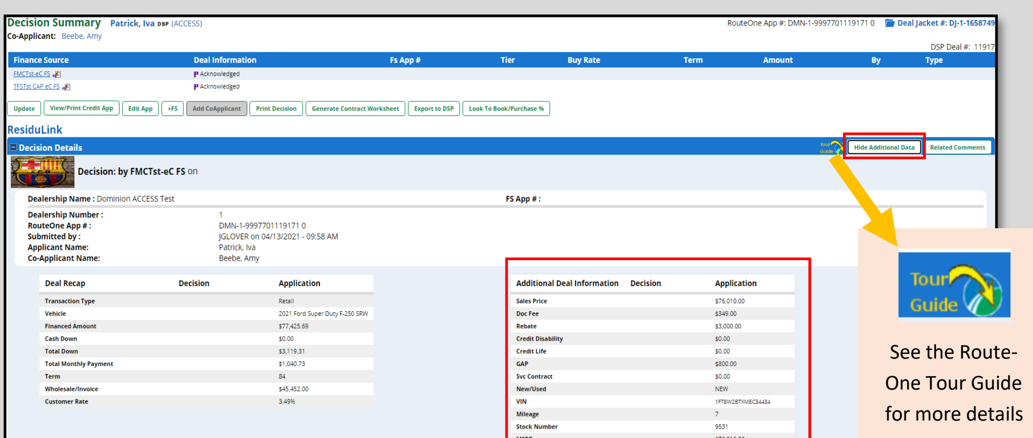
3. In the **Send App To** section, check the lenders for submission.
4. The required fields are highlighted in yellow and governed by your selection of lenders. Complete all highlighted information and click the [**Submit**] button at the bottom right.



1. In the **App Manager** screen, the status under the customer name is now "*Sending*".
2. Open the **Decision Summary** page by clicking on the status box under the customer's name. This page displays the current status of each lender submittal.

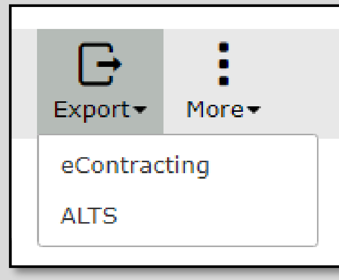


3. Click the [**Update**] button to check for status changes. Use the [**Hide Additional Data**] button to limit the display as needed.



For Technical or Software Support, please contact:

eContracting



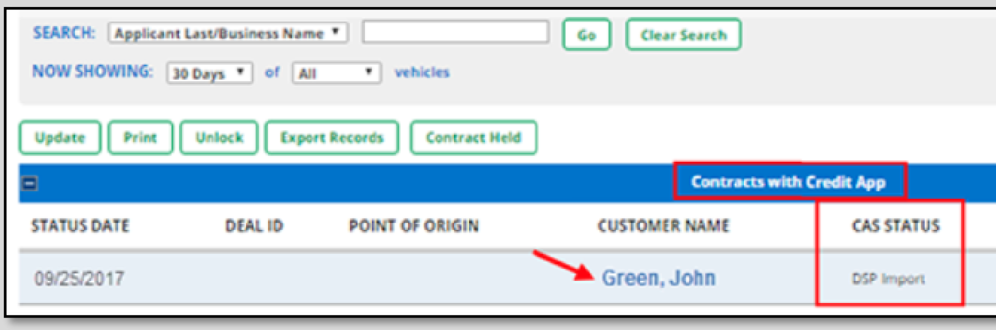
Within VUE:

Sales and F&I

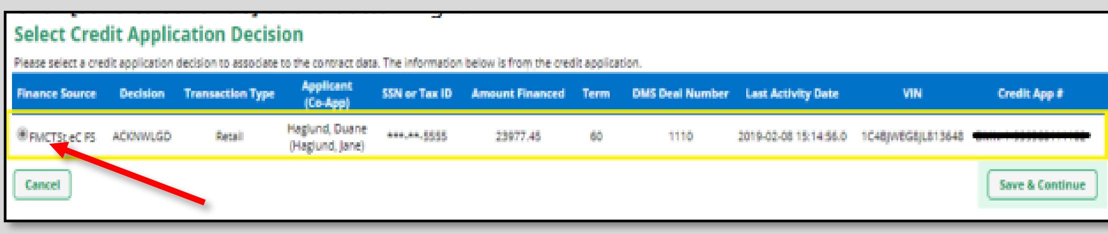
1. Navigate to Sales > F&I > Sales Desk or Deals
2. Filter/Sort the primary grid to locate the Sales Desk or Deal.
3. Click to select the corresponding line for the Sales Desk or Deal.
4. Update the Deal based on the approved lender terms.
   - Click [**Make Deal**] if you have not already done so.
5. Click the **Export** button in the Action Ribbon to send the eContract or and select [**eContracting**] from the drop down.

Within RouteOne:A

1. Navigate to the **Contract Manager** screen on the **Contracts** tab.
2. Click on the Customer Name hyperlink to open the **Credit Application Decision** screen.



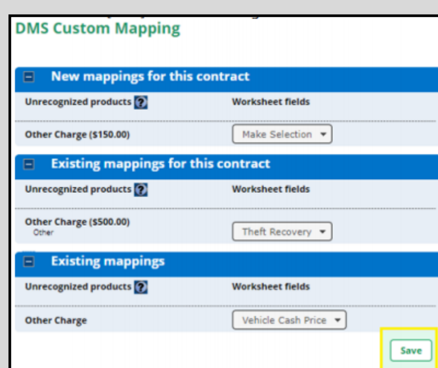
3. Select the credit application to use with the contract by marking the bullet on the left.



4. Click the [**Save & Continue**] button at the bottom right to open the **Contract Worksheet** screen.
   - If you elected to pair the deal with a previously approved or a previously saved Credit Application, some fields (e.g. Contract Header, Buyer Info, Vehicle Info, etc.) are pre-populated.
   - If you elected to create a new 'Credit Application,' you input the information manually.

***NOTE**: First time users may need to set up Custom Mapping for the Worksheet fields.*

*Within the **DMS Custom Mapping** screen make any edits needed and click [**Save**] in the bottom right to continue.*

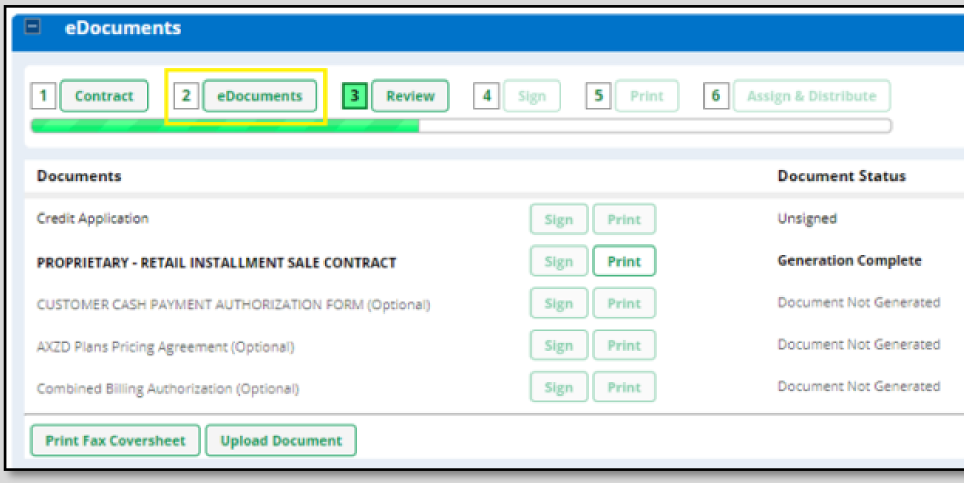


eContracting - Continued

Within the **Contract Worksheet** screen:

5. Review the screen and make any final edits as needed.
6. Click the [**Validate**] button at the bottom right. After validation, the [**Generate Contract**] button appears.

7. Click the [**Generate Contract**] button to open the Contract Package screen.
8. Once you **Generate the Contract** you are directed to the **Contract Package** screen.



Sales and F&I - Single Signing

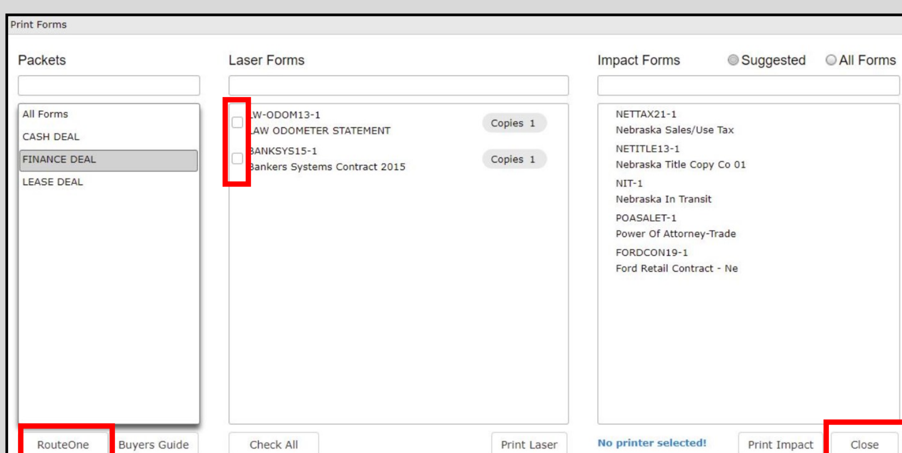
If the user has opted for the single signing ceremony, the following steps must be taken.

Within VUE:

1. Navigate to Sales > F&I > Sales Desk or Deals.
2. Filter/Sort the primary grid to locate the Sales Desk or Deal.
3. Click to select the corresponding line for the Sales Desk or Deal.
4. Click the **Forms** button in the Action Ribbon.

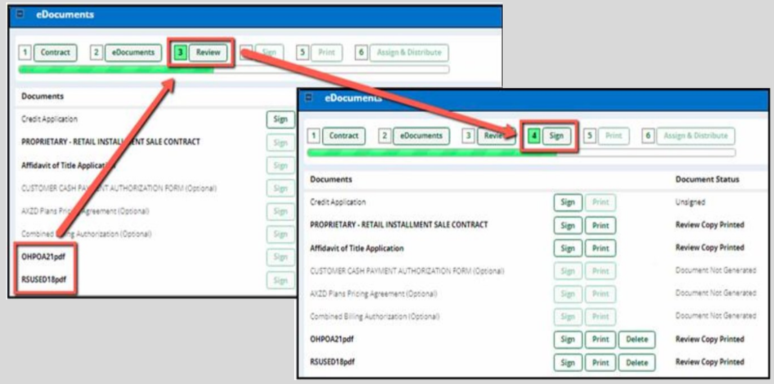
- Select the laser forms to push to RouteOne. Mark the boxes to the left of the laser forms you wish to use.
- Click the [**RouteOne**] button in the lower left to send them to RouteOne.

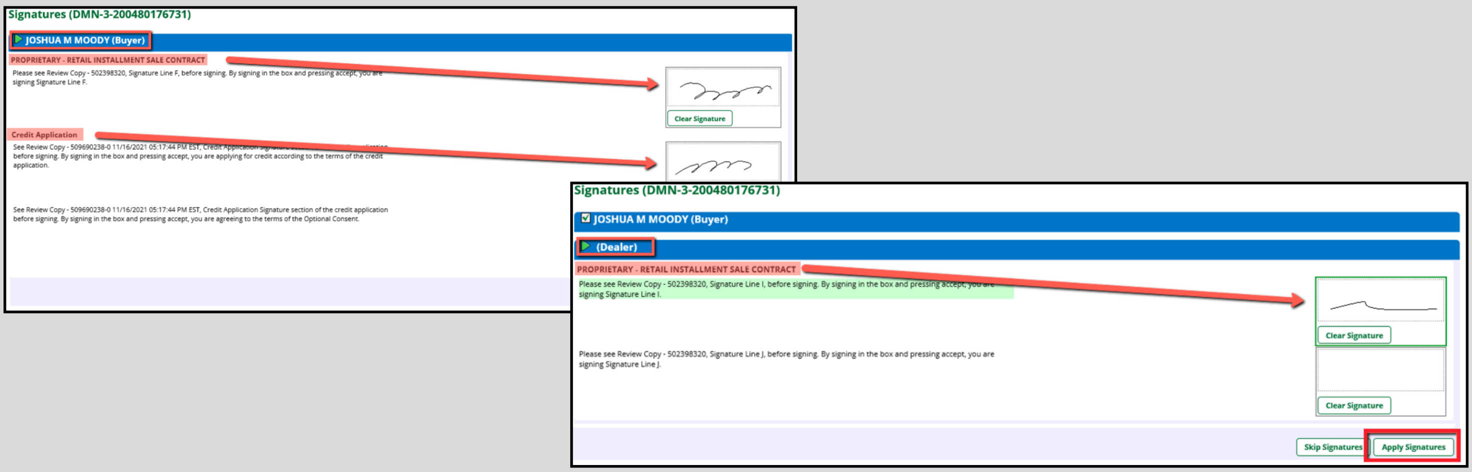
5. Click the [**Close**] button.



Within RouteOne:

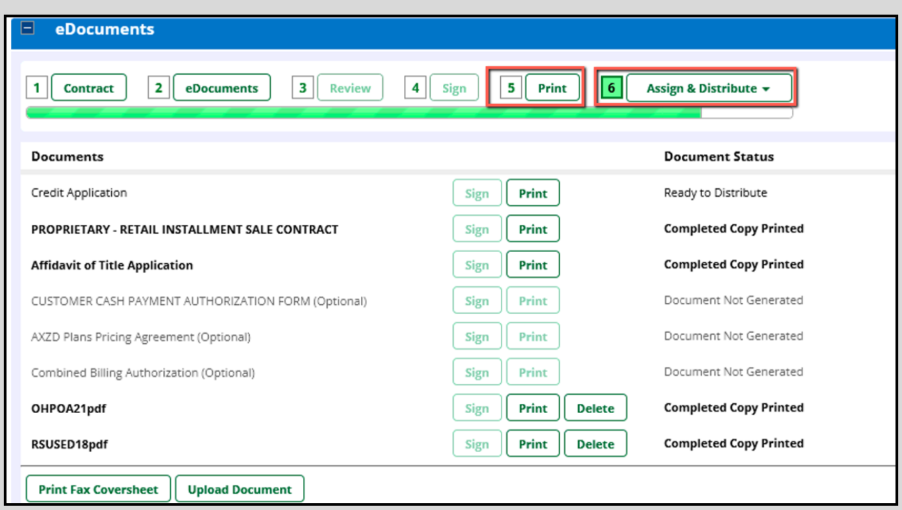
1. Click the [**REVIEW**] button once documents are uploaded on the eDocuments page.
2. Click the [**SIGN**] button.
3. Collect Customer signatures.
4. Click [**Apply Signatures**].
5. Dealer Signs. (customers must sign first).
6. Click [**Apply Signatures]** button.





7. Click the [**Print**] button and then click [**Assign & Distribute**].
NOTE: As with a standard eContract, you will have two options to distribute the contract:

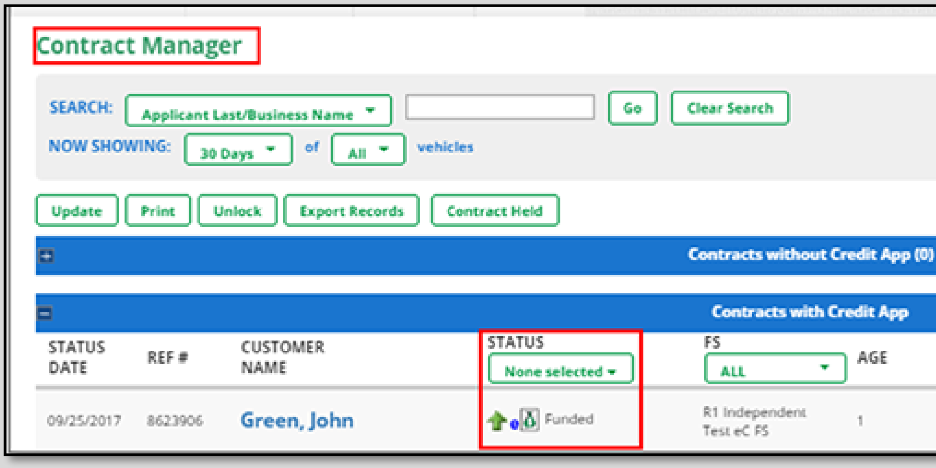
- '**Right Now**:' means you have already faxed or uploaded all documents, and RouteOne distributes to the finance source immediately.
- '**After Fax**:' means you fax the documents at a later time, and upon receipt of the documents, RouteOne distributes to the finance source.



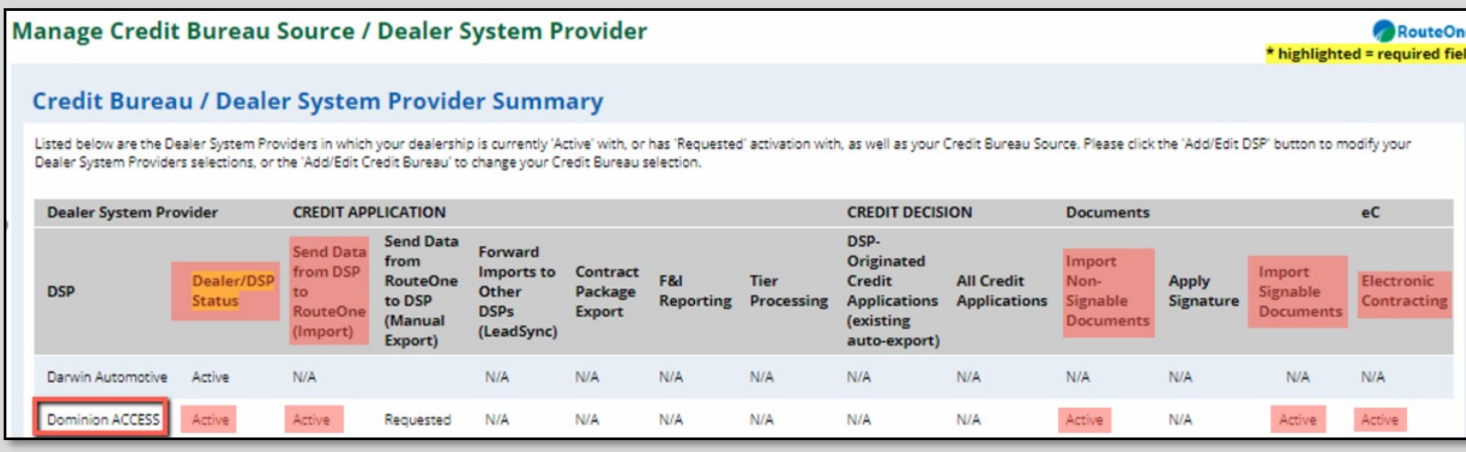
eContracting - Deal Funding Review

Within RouteOne:

Once you have assigned and distributed the eContract, you can check its Status on the 'Contract Manager' page. Review the Status column to confirm funding.



Criteria for RouteOne eContracting - Single Signing



Manage Credit Bureau Source / Dealer System Provider

* highlighted = required field

Credit Bureau / Dealer System Provider Summary

Listed below are the Dealer System Providers in which your dealership is currently 'Active' with, or has 'Requested' activation with, as well as your Credit Bureau Source. Please click the 'Add/Edit DSP' button to modify your Dealer System Providers selections, or the 'Add/Edit Credit Bureau' to change your Credit Bureau selection.

Dealer System Provider		CREDIT APPLICATION						CREDIT DECISION		Documents			eC
DSP	Dealer/DSP Status	Send Data from DSP to RouteOne (Import)	Send Data from RouteOne to DSP (Manual Export)	Forward Imports to Other DSPs (LeadSync)	Contract Package Export	F&I Reporting	Tier Processing	DSP-Originated Credit Applications (existing auto-export)	All Credit Applications	Import Non-Signable Documents	Apply Signature	Import Signable Documents	Electronic Contracting
Darwin Automotive	Active	N/A		N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Dominion ACCESS	Active	Active	Requested	N/A	N/A	N/A	N/A	N/A	N/A	Active	N/A	Active	Active

For Dominion ACCESS SET the following to ACTIVE:

- Dealer DSP Status
- Send Data from DSP to RouteOne (Import)
- Import Non-Signable Documents
- Import Signable Documents
- Electronic Contracting