Integration Quick Start Guide

RouteOne's innovative Dealer Management System (DMS) integration solution enables a two-way exchange of credit application information with your Reynolds system. Reynolds and Reynolds (Reynolds) integration allows fields on the RouteOne credit application to be populated with information obtained electronically from your Reynolds F&I FAIT system, thereby eliminating duplicate data entry. Saved or sent applications in the RouteOne system can be easily imported and exported via your Reynolds system. In addition, the RouteOne Reynolds integration solution provides enhanced reporting on all F&I information extracted nightly from your Reynolds system. Reynolds deal information will automatically populate the F&I Log, F&I Performance, Decision Analysis (Time and Mix), and Time Sales Analysis reports in the RouteOne Dealer Reporting Suite.

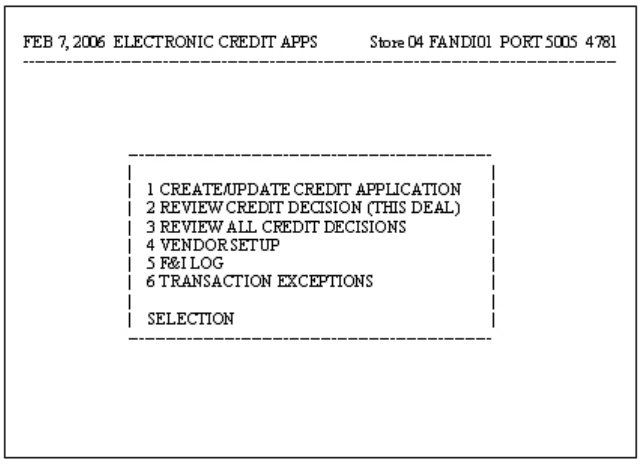
Key Features of this guide:

- How to import credit applications to RouteOne from your Reynolds F&I FAIT system
- How to export credit applications and Finance Source decisions from RouteOne to your Reynolds F&I FAIT system
- How to view all your dealership's F&I activity in the RouteOne Reporting Suite from data extracted nightly from Reynolds.

Importing Deals from Reynolds F&I FAIT to RouteOne

Importing a credit application from your Reynolds F&I FAIT system is quick and easy! At a minimum, you must have the applicant's name, address, city, province, country, and postal code completed in your Reynolds F&I FAIT system to import a deal to RouteOne.

1. From your Reynolds system, access the Deal or Lease worksheet screen (4781/4780) in F&I FAIT.
2. At the worksheet command line, enter '**ET**' to display the Electronic Credit Apps screen. If more than one credit processor is set up on your system, the screen displays all the vendors.
3. Select the number to the left of RouteOne to submit credit applications to RouteOne. The selection screen displays.
4. Enter '**1**' to create or update the credit application (as seen below).

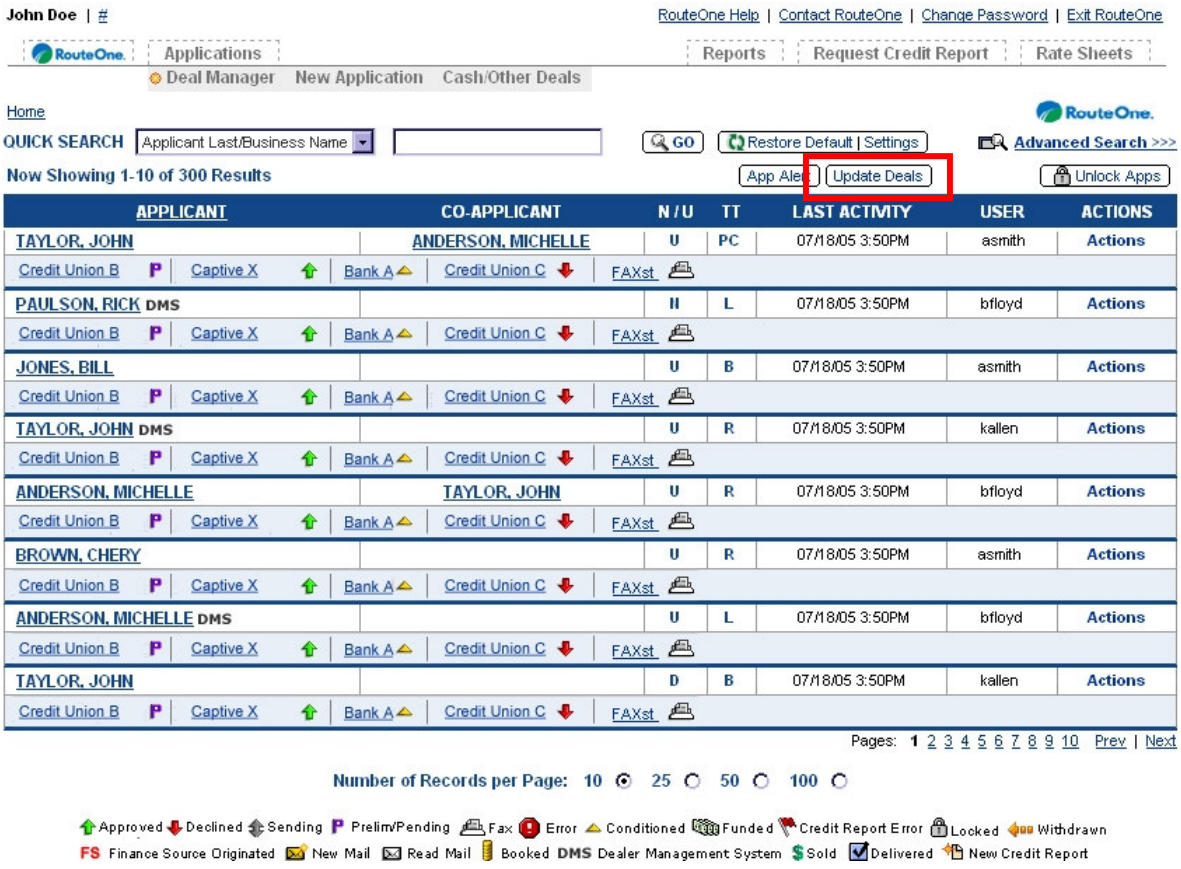


5. Enter **only the required fields** (denoted with an asterisk) on F&I FAIT Screen 1 or you may complete all of the personal, employment, vehicle, and financial information necessary for the application. Please note that RouteOne also requires the field **FIRST NAME** to be completed for the application (this is not indicated with an asterisk).
6. When you have completed at least the required fields on F&I FAIT Screens, enter '**T**' to transmit the application to the RouteOne system.

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. Only deals with activity in the last 60 days are shown on the *Deal Manager*.

Click the Update Deals button located in the upper right-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.



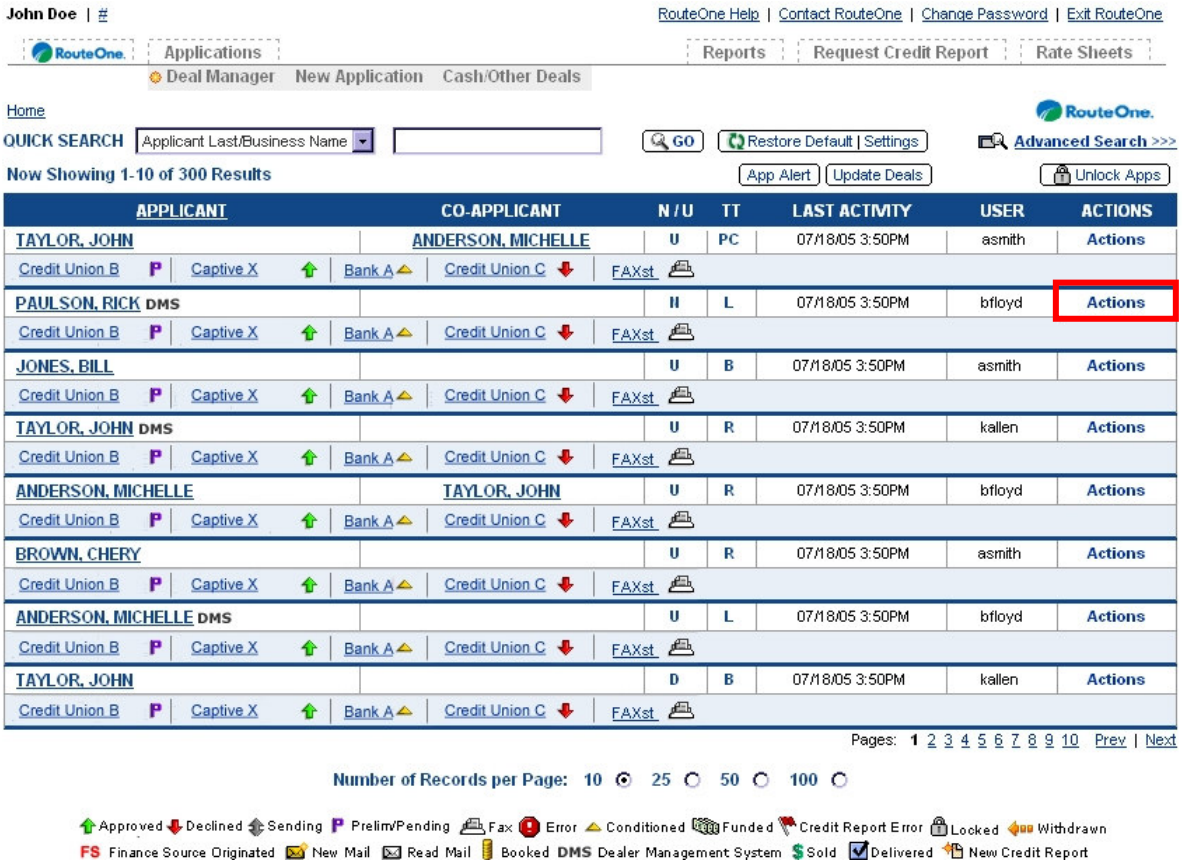
Submitting Imported Deals to a Finance Source

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 Reynolds 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.

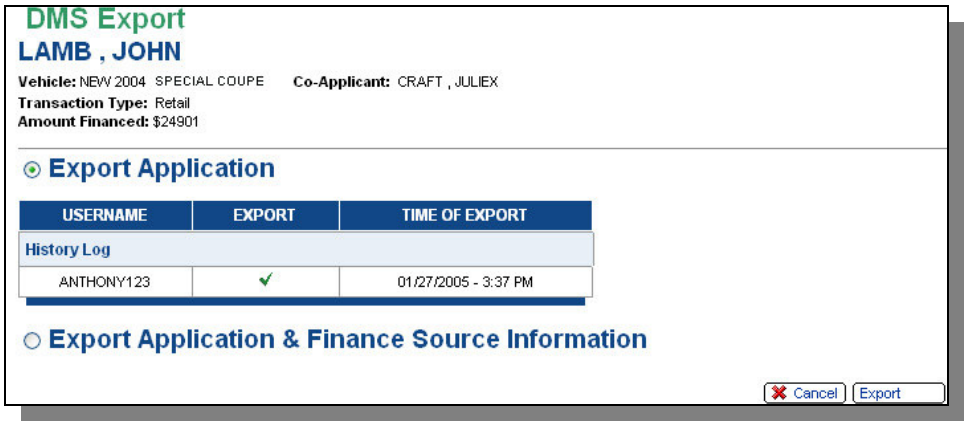
Exporting Deals from RouteOne to Reynolds F&I FAIT

The RouteOne Reynolds integration also allows you to export an application and Finance Source decision from RouteOne to your Reynolds F&I FAIT system. All deals imported to the RouteOne system from Reynolds will update the same deal number in Reynolds upon exporting the deal from RouteOne. In order to do so:

1. From the **RouteOne Deal Manager Screen,** click the **Actions** link located in the right column of the Deal Manager for the customer/application you wish to export.

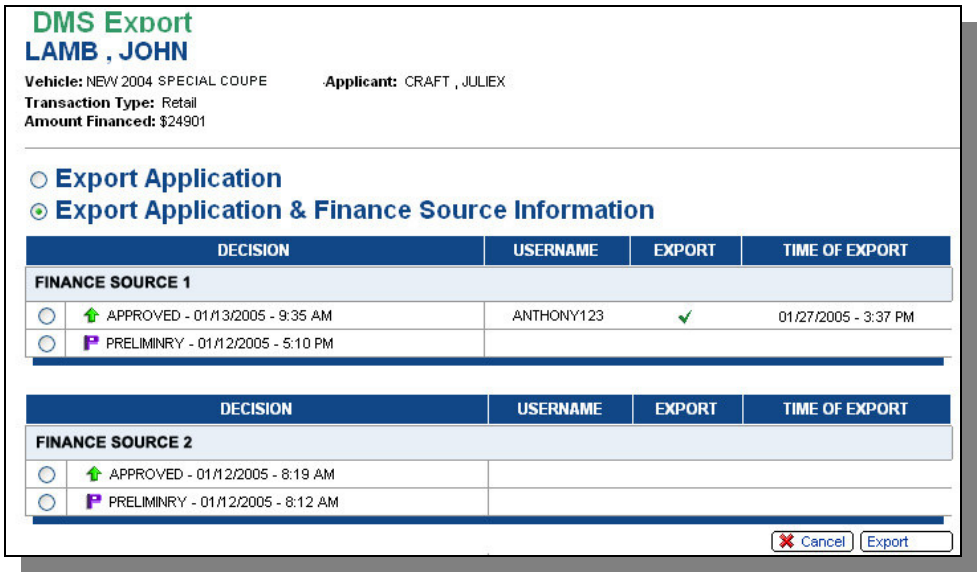


2. A RouteOne **Export Options Screen** will display.



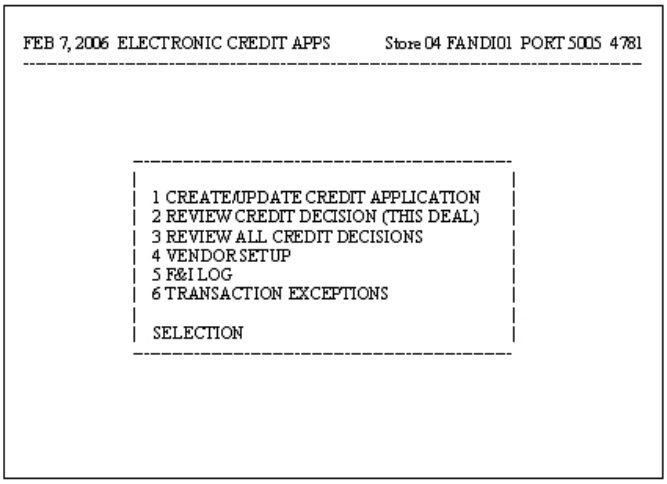
3. Select one of the following:

- **Export Application Only:** Selecting this option will allow you to export data entered in the RouteOne application (excluding any credit decision) to your Reynolds F&I FAIT system. If you selected **Export Application Only,** continue the export process by clicking the Export button.
- **Export Application and Credit Decision:** Selecting this option will export data entered in the RouteOne application and select credit decision information to your Reynolds F&I FAIT system.



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 Export button. Your exported deal is now available in your Reynolds F&I FAIT system.

4. Once back in the Reynolds system, access the Deal or Lease worksheet screen (4781/4780) in F&I FAIT.
5. At the worksheet command line, enter '**ET**' to display the Electronic Credit Apps screen. If more than one credit processor is set up on your system, the screen displays all the vendors.
6. Enter '**2**' to Review Credit Decision (This Deal) or enter '**3**' to Review All Credit Decisions (as seen below). Please note that when selecting '**2**', you must be in the original deal in the worksheet to exercise this option.



7. You may view Comments, Stipulations, and Detailed Messages pertaining to the credit decision.
8. You may also compare the original deal if originated from your Reynolds F&I FAIT application by selecting '**C**' to Compare with Original.
9. Once you have compared the lender's decision with the original deal information, you may select '**S**' to save any updated changes. When saving the changes, you will see the message "Updating Current Deal' which will save the information into your deal worksheet.

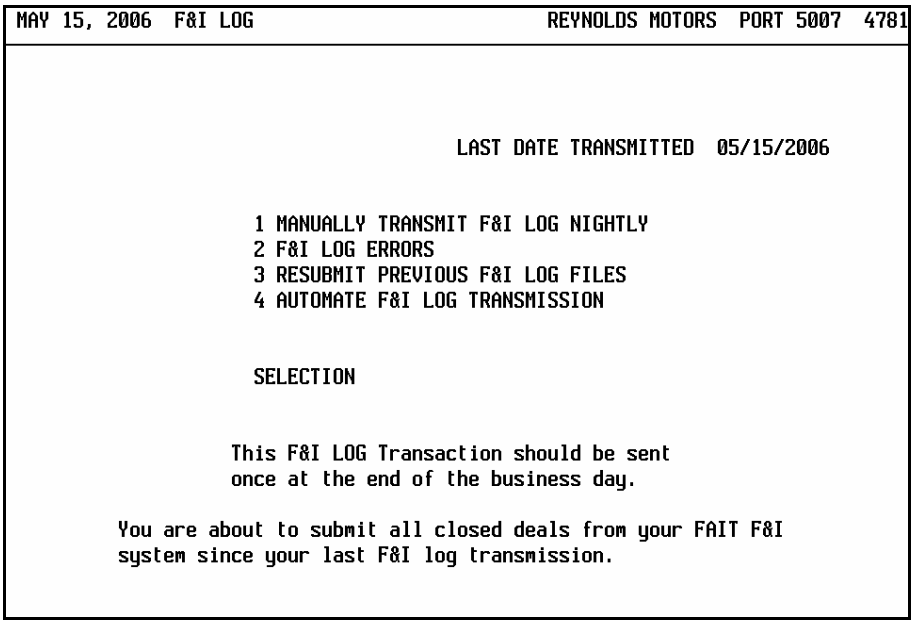
Note: Only blank fields will be updated with the '**S**' option in the deal worksheet. No original deal data will be overwritten if the information has changed from the original deal in the Reynolds system when updated from RouteOne.

F&I Log

RouteOne provides analysis reports to help you manage your F&I finance and lease penetration. By providing all sold and delivered deals from ERA to RouteOne, you can have a complete picture of your finance and lease penetration contained in these reports. ERA allows you to send all closed deals as a batch file using the F&I Log selection available on the Electronic Credit Apps menu.

☞ **Only deals that have been closed in F&I (using the F12 function) will be sent.**

1. Access the Deal or Lease worksheet screen (4781/4780) in ERA F&I FAIT.
2. Enter **ET** at the command line. The Electronic Credit Apps screen displays.
3. Enter **5** to select F&I Log. The F&I Log screen displays.
   ☞ The date of the last successful transmission displays above the selections.



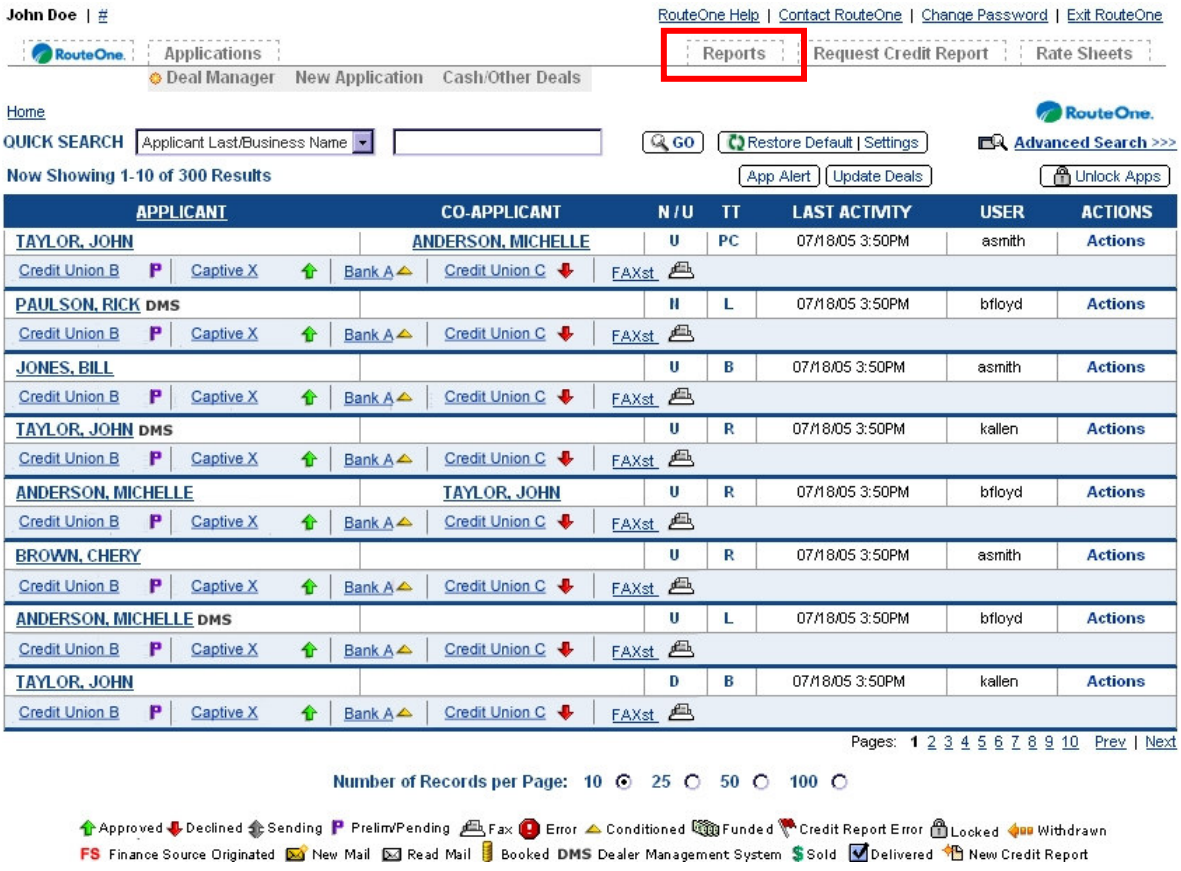
RouteOne Dealer Reports

The RouteOne system can generate a variety of reports to help you better manage your business and identify opportunities to increase profits. As a RouteOne/Reynolds FAIT integrated dealer you have access to a powerful Dealer Reporting Suite:

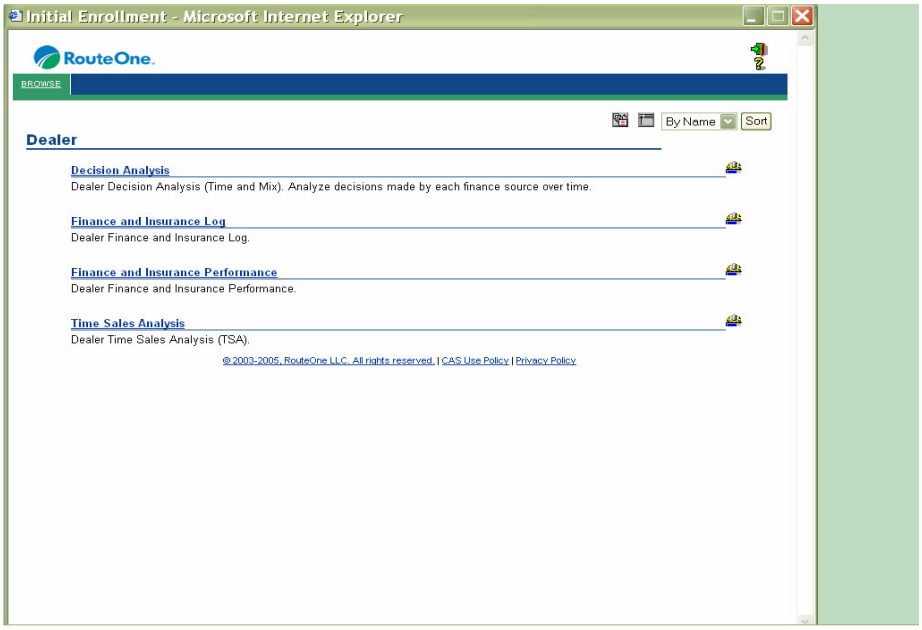
- **Decision Analysis (Time and Mix) Report:** Allows you to monitor decision time and mix, by Finance Source, for your decisioned credit applications.
- **Time Sales Analysis Report:** Provides share analysis by Finance Source showing finance penetration both as a percentage of total vehicle sales as a percentage of finance contracts (available "time sales").
- **Finance & Insurance Log Report:** Provides a comprehensive sales record, displaying relevant attributes for each sales transaction and totals/averages for the selected date ranges ad input parameters. This report closely models many of the manual and automated F&I Logs used today.
- **Finance & Insurance Performance Report:** Displays comprehensive F&I performance data sorted by F&I Manager and Department Total, with both detail and summary levels. This report includes profit (average and per vehicle retailed) and penetration calculations for each F&I product line.

Each night, RouteOne will retrieve a file from the Reynolds F&I FAIT system detailing ALL of your dealership's closed or finalized deals. **Only deals that have been closed in F&I (using the F12 function) will be sent.** 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 Reynolds & Reynolds or RouteOne system.

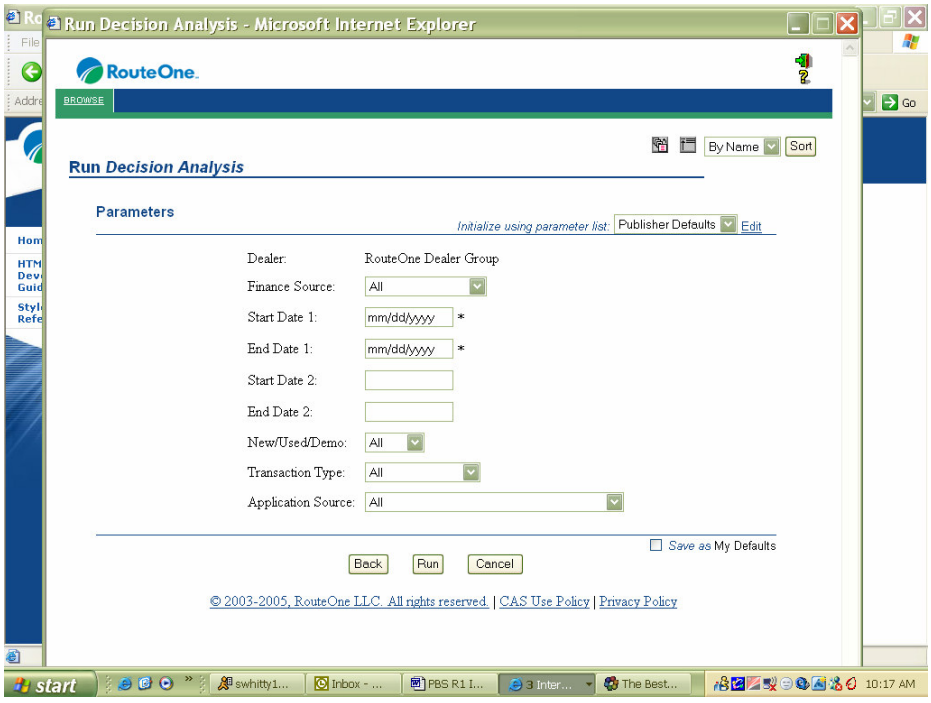
1. Simply click the **Reports tab** at the top of any screen to open a new browser window.



2. Select the report you'd like to run.



3. Set the parameters and time frames from the drop down lists to help you better compare and analyze information. Click on **Run** to generate the report (this may take several seconds).



Previously generated reports will remain accessible for 24 hours; however, the data used to run the reports is available in the RouteOne system for 24 months so you can always regenerate any dealer report. You can also view, save, and print reports in a .CSV (comma separated value) file format for use with spreadsheet programs such as Microsoft® Excel.