RouteOne Dealership System Administrator (DSA) Training Manual
A Dealership System Administrator (‘DSA’) is a member of the dealership staff assigned to serve as the executor of RouteOne administrative tasks. DSA privileges allow DSAs to add and edit the dealership profile, subscribe for RouteOne products and services, add/delete credit bureau and DSP information, add additional finance sources, and manage dealership users.

To locate a DSA within a dealership, any RouteOne user may enter the system and click ‘My RouteOne’ at the top right hand corner of the screen. This will show the DSA assigned to that dealership. If the DSA is no longer at the dealership and the position needs reassigning, contact the RouteOne Help Desk at 866.ROUTE01.

All functions available to the DSA can be found under the ‘Admin’ tab, across the main navigation bar within the system. Only DSAs may access this tab.
1. **Dealer Info**

Under ‘Dealer Info’, a DSA may edit their dealership’s contact information as well as set preferences for defaults within the RouteOne platform.

1. Under the ‘Admin’ tab, click ‘Dealer Info.’
2. This brings up the ‘Dealership Information’ page, which allows for updates of dealership information, including address, contacts (such as Backup Admin, F&I Manager, Dealer Principal), preferences (i.e., setting defaults for the Make and New/Used Indicator for the dealership), eContracting details (where applicable), and enrollment information.
3. **Once the information has been edited or changed, click ‘Save Information’ at the bottom of the page to retain the changes.**

DSAs may also set their preferences for tools used within RouteOne. These include:

- New/Used indicator default
- Preferences for masking social security #, Tax ID, Driver’s License #
- Deal Saver settings
- Active User Report Settings
- Mobile Services participation
- Risk-Based Pricing/Credit Score Disclosure Generation preferences
- eContracting details

Under Dealer Info, DSAs may also view the instructions for using the Privacy Notice Form Builder.
2). **Premium Services**

The ‘Premium Services’ link allows the DSA to subscribe to RouteOne products and services.

1. Under the ‘Admin’ tab, click ‘Premium Services.’
2. Follow the links and directions provided to subscribe (or unsubscribe) your dealership to:
   a. RouteOne SecureDocOne
   b. CARFAX Vehicle History Reports
   c. Vehicle Values
   d. IDOne
   e. USEA – Equity Advantage Program
   f. Credit Application eSigning
   g. WebApplyOne
   h. Credit Card Services (offered by OEM)
   i. eContracting

3). **Credit Bureau / DSP (Dealer System Provider)**

This tab allows DSAs to edit/add credit bureau or DSP information.

1. Under the ‘Admin’ tab, click ‘Credit Bureau/DSP’.
2. A ‘Manage Credit Bureau / Dealer System Provider’ page will be presented. If you are currently associated to a Credit Bureau Provider and/or Dealer System Provider (DSP), that information will be displayed within the table.

**Adding/Editing Credit Bureau Information**

1. To view or change existing Credit Bureau Codes, click on the ‘Add/Edit Credit Bureau’ button.

**Credit Bureau / Dealer System Provider Summary**

<table>
<thead>
<tr>
<th>Dealership System Provider</th>
<th>CREDIT APPLICATION</th>
<th>eC</th>
</tr>
</thead>
<tbody>
<tr>
<td>DSP</td>
<td>Dealer DSP Status</td>
<td>Send Data from DSP to RouteOne</td>
</tr>
<tr>
<td>TEST DIS</td>
<td>Requested</td>
<td>Requested</td>
</tr>
</tbody>
</table>

**Credit Bureau Sources:** Direct Access Powered By RouteOne

[Add/Edit DSP] [Add/Edit Credit Bureau]
2. Scroll down the new page and hit ‘Continue’. Then select ‘Edit’. View Credit Bureau codes, or, to change/update the CB codes, enter in all the new information. Select ‘Continue’, then ‘Submit.’

3. To add a credit bureau provider (Reynolds’ CreditMaster, ADP’s Credit Check, or Direct Access Powered by RouteOne) click on the ‘Add/Edit Credit Bureau’ button.

4. If the credit bureau provider selected does not require codes, select the Credit Bureau, hit ‘Continue’ and ‘Submit.’ (Note: In selecting ADP Credit Check, ‘ELITE’ as a DSP needs to be in ‘Requested’ status FIRST, before selecting ADP Credit Check as a Credit Bureau.)

5. If the credit bureau provider selected does require codes, click the ‘Associate Credit Bureau’ button. (Note: In selecting CreditMaster (R&R), ‘ODS’ as a DSP needs to be in ‘Requested’ status FIRST, before selecting CreditMaster as a Credit Bureau.)

6. Choose each applicable credit bureau provider and enter in the necessary codes per the instructions below, then click ‘Add.’

7. After entering the codes, hit ‘Continue,’ then ‘Submit.’

**Requesting or Inactivating a DSP**


2. Should you choose to request activation of a DSP, ‘Add/Edit DSP’ button, then the ‘Show Inactive DSP’s’ and choose the DSP desired. Put EVERY applicable module into ‘Requested’ status, and then click ‘Submit.’ (Modules include Dealer/DSP Status, Send Data from DSP to RouteOne, Send Data from RouteOne to DSP (Manually), Send Data from RouteOne to DSP (Automatically), F&I Reporting, Electronic Contracting).

3. If you currently have a DSP(s) in ‘ACTIVE’ status and wish to inactivate the association, change EVERY applicable module to “inactive” status, then click ‘Submit.’

4. To make any DSP associations ‘ACTIVE’, contact the DSP and request they send an integration request form to RouteOne.
4). **Finance Source Association Information**

This tab allows you to request an association with a new finance source, or inactivate/remove a relationship with finance sources with whom you have an existing relationship.

**To Inactivate/Remove/Edit a Relationship with an Existing Finance Source**

2. The ‘Finance Source Associations’ page displays the finance sources to which you are currently associated. To Edit, Inactivate, or Remove a finance source, select the appropriate button within the ‘Actions’ column. Available functionality within each button is outlined below:
   - ‘Edit’: updates FS Dealership ID, decision to Share Data, decision to Share F&I, decision to Share NPPI or turn “off” Share NPPI
   - ‘Inactivate’: inactivates relationship. By choosing ‘Removed by Dealer’ or ‘Inactivated by Dealer’ status, your dealership will no longer be able to send credit applications to this finance source
   - ‘Remove’: removes this finance source from active finance source lists for any finance source with whom your dealership is associated
Additional Functionality Within ‘Finance Sources Associated to Dealership’ screen

**Editing a Dealer User’s Captive ID**
1. In the ‘Finance Source Associations’ section, scroll down and click on the ‘Show Captive User ID’s’ button.
2. Enter the Captive User ID for each user in the dealership. (This ID is what they use to login to their Captive portal.) Chrysler and GMAC dealers use the Captive User ID to log directly into their captive portal and also to RouteOne, without using a RouteOne ID (this is known as ‘single sign-on’, or ‘SSO’).

![Show Captive User IDs](image)

**Adding Fax Finance Source(s)**
Finance sources not integrated to RouteOne may be added to the system as a ‘Dealer Defined Fax Source’. The finance source will appear as a ‘send’ option within the Finance Source Associations screen, and will receive a faxed credit application from RouteOne. You may add up to 12 ‘Dealer Defined Fax Sources’.
1. On the ‘Finance Source Associations’ page, scroll down to ‘Dealer Defined Fax Sources’.
2. Click on ‘Add Fax Sources’
3. Complete the outlined information and hit ‘Save Information' to retain changes.

![Dealer Defined Fax Sources](image)
To Request a Relationship with a New Finance Source

1. Selecting the ‘Add Finance Source’ button brings up the ‘Available Finance Sources’ page, displaying all finance sources currently integrated to RouteOne.

2. To notify a finance source that you wish to establish a relationship with them, click the ‘Associate’ button. An electronic request will be automatically sent to the finance source for association. This finance source will immediately appear as ‘Requested’ in your list of finance source options and will display as such until the finance source approves the request for ‘ACTIVE’ association.
5). **Franchise/Brand**

This page allows you to view, add associations with, and edit your existing Franchise/Brand Associations.

To add an association with a Franchise/Brand, select the “Add Franchise/Brand” button. This will allow you to view the Franchise/Brands available to your dealership (only for new Franchise/Brands – used does not apply). Once added, the Franchise/Brand selected will appear in the table below.
6). **Dealer User Information**

This tab allows the DSA to create and edit permissions for users within the dealership.

**Creating a new Dealer User**
1. Under ‘Admin,’ click ‘Users.’
2. On ‘Users Associated with this Dealership’ page, click on the ‘Create User’ button.
3. Enter all required information (highlighted in yellow), as well as the appropriate permissions.
4. If this user has a Captive ID, enter it at this time.
5. A screen will appear stating ‘Dealer User Created Successfully.’ This will also provide the new user’s RouteOne ID, which the user will need (as well as the password that was just created for them) to log in to RouteOne directly.
Associating a Dealer User
This allows for the association of users to a particular dealership.

1. Under ‘Admin,’ select ‘Users.’
2. On ‘Users Associated with this Dealership’ page, click on the ‘Associate User’ button.

3. Enter the already existing User Name, User ID, or Captive ID and hit ‘Search.’
4. When the user to associate is located, click the ‘Select’ button (under Actions), scroll to the bottom and hit ‘Save and Exit.’ Profile information or permissions for this user may be edited at this time.

Editing a Dealer User
2. Enter and update profile information and permissions (including password resets) for existing users by clicking the ‘Edit’ button.

RouteOne training is available for dealer users at no cost. Please contact your captive representative with any questions. Additional inquiries can be directed to the RouteOne Sales Support line at 866.933.0663, or dealers may visit the RouteOne Landing Page for enrollment in complimentary weekly training sessions.