RouteOne Mobile eContracting Application

Quick Reference Guide
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FAQ’s

• How can I access the eContracting Signing Application?
  • The application can be accessed via two methods:
    1. Downloading the application from the App Store.
    2. Accessing the application from a web browser:
       • https://www.routeone.net/esign

• What contract packages are shown in the eContracting Signing Application?
  • Contract packages will not be available in the signing application until after the “Customer Review Copy” of the contract has been printed from the RouteOne System.

• Do I need to exit RouteOne on my desktop computer in order to access the contract package on the application?
  • No, you can remain in the contract package on your desktop and still access the contract on the application.

• Who do I contact if I experience an issue?
  • You can contact the RouteOne Service Desk at 866-768-8301 and press 2 for eContracting
Logging In and User Permissions

• Use your regular RouteOne User ID and Password to access the Tablet Signing Application.

• The same signing permissions used in the eContracting system are used for the application.

  - **General eContracting**: User can view contract packages and documents only.
  - **Sign Contracts**: User can view contract packages & sign documents.
Navigation Options

• 3 Search/Navigation options are available to find a contract package.

  • **Ready to Sign:**
    • Lists contract packages where the “Customer Review Copy” has been printed but signatures **have not** been collected.

  • **All Contracts:**
    • Lists all contract packages where the “Customer Review Copy” has been printed, even if signatures have already been collected.

  • **Search:**
    • Provides the ability to search for any contract package shown in the “Ready to Sign” or “All Contracts” tab.
Viewing a Contract Package

- To view a contract package and to capture signatures, find the desired contract package using one of the 3 navigation options. Once the contract package has been found, click the “View” button on the corresponding row for your desired contract package.
Understanding the Contract Package Page

A. The RouteOne Contract Number
B. The “Sign All” button allows you to capture signatures from each person on all documents in the contract package.
C. A list of all documents in the contract package is shown in the “Sign Individual Documents” section.
D. You can view a PDF of each document by clicking the “View” button.
E. You can collect signatures for an individual document by clicking the “Sign” button.
Signing Documents

- The signing process allows for you to quickly capture signatures from your customer.

- The self-guided process will proceed through all signature lines one-by-one for the current signor, allowing you to quickly and efficiently capture all required signatures.
Understanding the Signing Page

A. “Return to Package” allows you to exit signing process and return to the contract package page.

B. “Skip Actor” allows you to skip signature collection for the current signor and move on to the next signor.

C. The current signor’s name and title is displayed for reference.

D. Document and signature line information are presented to show the customer what document and signature line they are signing.
Understanding the Signing Page, continued

E. The signature capture box is used to capture a signature by writing with a finger or stylus.

F. “Clear Signature” allows for the signature box to be cleared to re-capture a signature.

G. “Accept Signature” captures the signature from the signature box and proceeds forward to the next signature line.

H. The “Signature Collection Process” bar indicates how far through the signature process the current signor is.
Capturing Signatures

- The signature is captured by writing in the box with either the person’s finger or stylus.

- Clicking “Accept Signature” captures the current signature and moves the signor forward to the next signature automatically.

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**Kathy Smith**

Buyer

Retail Installment Contract

Please see Review Copy - 1197897, Signature Line C, before signing. By signing in the box and pressing accept, you are signing Signature Line C.

**Signature Collection Process:**

- Clear Signature
- Accept Signature

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**Kathy Smith**

Buyer

Retail Installment Contract

Please see Review Copy - 1197897, Signature Line D, before signing. By signing in the box and pressing accept, you are signing Signature Line D.

**Signature Collection Process:**

- Clear Signature
- Accept Signature
Customer Signature Review

• After collecting all signatures for an individual signor, the signature review page is displayed.

• This page allows for the customer to review all of the signatures they have captured.

• If the customer wants to re-capture a signature, they can do so by clicking the “Re-Capture Signature” button.

• Once the customer has reviewed their signatures, pressing the “Continue” button will proceed to the dealer’s review page of the customers signatures.
Dealer Review of Customer Signatures

• The signature review page for the dealer provides you the opportunity to review your customer’s signatures.

• If you need to re-capture a signature, you can do so by clicking the “Re-Capture Signature” button.

• Once you are satisfied with the signatures, click “Apply Signatures” to add the signatures to their documents.

IMPORTANT NOTE: Clicking “Apply Signatures” creates the Authoritative Contract.
Co-Buyer and Dealer Signatures

Co-Buyer

• If the contract includes a Co-Buyer, the application will proceed to the signature capture page for them after you click “Apply Signatures” for the Buyer’s signatures.

  • The signature collection process for the Co-Buyer is the exact same as it is for the Buyer. Steps include:
    • Signature Collection
    • Customer Review of Signatures
    • Dealer Review of Signatures
    • Application of Signatures to the Document

Dealer

• Your process for collecting signatures is similar to the Buyer and Co-Buyer. Steps include:
  • Signature Collection
  • Review of Signatures
  • Application of Signatures to the Document
Signing the Credit Application

- After collecting all signatures, if the contract package has an unsigned Credit Application, you will be asked if you would like to sign the credit application.
Signing the Credit Application, continued

- Signing the Credit Application is identical to signing the contract documents.

- The only difference occurs when signing the line for the Credit Application Marketing Communication consent.
  - This signature provides the opportunity for the customer to opt-out of the marketing communication.
Viewing & Printing Documents

- Clicking “View” on an individual document will open a PDF copy of the selected document.
Viewing & Printing Documents, continued

• Clicking the “Print” will prepare the document for printing and then open the Print dialog box on your device.