



RouteOne Rules Engine setup for Shop-Click-Drive

This guide will give you a high-level overview on how to setup the Rules Engine for the Shop Click Drive program. If you need more assistance please see the detailed setup guide.

This setup guide assumes that the dealership has the following already set up in the RouteOne system.

1. Credit Bureau integration and subscribed to a Used Valuation Guide

1. Go to the **Admin Tab** and scroll down to **Dealer Info**
2. Find the section **Online Retail Services**
3. In the dropdown select **Shop-Click-Drive**
 - a. Two links will appear
 - i. Click on the first
 - ii. View Online Retail Services Process Setup
4. Accept the **Shop-Click Drive Agreement** and continue
5. The **Trade-In Deal Details** page will appear, allowing you to select the Guide Book that you subscribed to for the program.
6. **Accept** the Addendum

Trade-In Deal Details:

Select Preferred Used Valuation Guide Book

At least one book must be subscribed, but only one can be selected for online purchasing use. If no books are currently subscribed, you must select the 'Admin' tab and choose 'Premium Services', where you can activate valuation services. To edit your existing subscription(s), you may select the 'Go To Premium Services' button below.

Guide Book	Status	Pricing Type
<input type="radio"/> NADA	Subscribed	Trade-In
<input checked="" type="radio"/> Kelley Blue Book	Subscribed	Trade-In
<input type="radio"/> Black Book Weekly	Subscribed	Trade-In
<input type="radio"/> Black Book Monthly	Not Subscribed	Trade-In

[Go To Premium Services](#)

ADDENDUM AGREEMENT FOR ADDITIONAL VEHICLE VALUES SERVICES

This Addendum Agreement, effective as of Dealer's acceptance of the terms contained herein, is by and between 'You' ("Dealer") and RouteOne LLC, a Michigan limited liability company ("RouteOne"), collectively, the "Parties" and individually, a "Party". The Parties are parties to a Dealer Participation Agreement (as amended or otherwise modified, the "Agreement"). Capitalized terms not otherwise defined herein shall have the meanings set forth in (or by reference in) the Agreement. Any reference to the Agreement after the effectiveness hereof shall be deemed to refer to the Agreement as amended or otherwise modified hereby.

1. Additional Services Provided by RouteOne. RouteOne agrees to provide additional Vehicle Values services to Dealer (the "Additional Vehicle Values Service") which will enable the Dealer to:
 - a) provide Kelley Blue Book Trade-in Valuations on an individual basis to customers of Dealer in connection with Dealer's vehicle sales and/or vehicle loan processing.
2. Dealer agrees that such Additional Vehicle Values Service shall be subject to all terms and conditions as identified in the Addendum Agreement for Vehicle Values Services executed between Dealer and RouteOne.

By checking this box and clicking on "Save Information", I agree to modify the terms of the Dealer Participation Agreement as described above.

[Cancel](#) [Save Information](#) [Save and Continue to Decisioning Setup](#)

8. You will be brought back to the **Dealer Info** page.
9. Go back to the **Online Retail Services**
10. Choose the second Link
 - i. View Online Retail Services Decisioning Setup
11. Select the **Preferred Credit Reporting Agency** you will like to use for the program.
12. Set the **Finance Source Selection Rules** for both **Incentive** and **Non-Incentive** for Credit App Submission.
13. **Save Information**.

Preferred Credit Reporting Agency:

Select Preferred Credit Reporting Agency

Dealer must select one active credit reporting agency for online retail services use. This preference selection will only support Online Retail Services transactions, not RouteOne generated applications. If no credit reporting agencies currently have a status of Active, select the 'Admin' tab, and choose 'Credit Bureau / DSP', where you can activate credit bureau services. To edit an existing 'Active' credit bureau provider, you may select the 'Go To Add/Edit Credit Bureau' button below to edit your existing provider in the Manage Credit Bureau Source page.

Credit Reporting Agency	Status	Provider
<input type="radio"/> Equifax	Active	Direct Access Powered by RouteOne
<input checked="" type="radio"/> Experian	Active	Direct Access Powered by RouteOne
<input type="radio"/> TransUnion	Active	Direct Access Powered by RouteOne

[Go To Add/Edit Credit Bureau](#)

Finance Source Selection Rules:

Disclaimer: Dealer is responsible for compliance with all adverse action notice requirements. By setting minimum credit score and other finance source selection rules, Dealer may be required to provide consumer applicants adverse action notices.

Incentive Finance Source Selection Rules for Credit App Submission:

Note: If an online retail services credit app containing an incentive does not fit these rules, the application may not be automatically submitted.

Finance Source	Transaction Type	Minimum Credit Score
1 Make Selection	Make Selection	

[Add Rule](#) [Delete Rule](#)

Non-Incentive Finance Source Selection Rules for Credit App Submission:

Finance Source	Transaction Type	Min	Max
1 Make Selection	Make Selection		
		Credit Score	
		LTV (%)	
		PTI (%)	

[Add Rule Table](#) [Delete Rule Table](#)

[Cancel](#) [Save Information](#)

If you need more assistance please see the Detailed Quick Start Guide