

Release Notes

REC/VFI EXTERNAL

February 2014

REC/VFI EXTERNAL

Publication Information / Version

Full Product Name: AppOne
Document Title: Internal Release Notes
Software Version Information: 2013.5
Document Version Information: 2.0
Release Date: February 2014

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U.S. Patent No. 7,734,530

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RECEIVED EXTERNAL

Update Quick Start Guide Link in the Support tabs

The REC Quick Start Training Guides was updated on the support tab.

Specialty Dealer Portal
Wolters Kluwer Financial Services | appone

HOME | CREDIT REPORTS | LENDERS | ADMIN CONSOLE | **SUPPORT**

Start Here
Click one of the topics below

- [Frequently Asked Questions](#)
- [Training Materials](#)
- [Online Training Videos](#)
- [System Manuals & Training Guides](#)

System Manuals & Training Guides

Our Training Department has compiled the following documentation and training materials. We recommend that you download and print the documents appropriate for your system.

- [AppOne Portal Quick Start Guide](#)
- [AppOne Portal Training Document](#)

Partner Training Guides

Our Training Department has compiled the following documentation and training materials in conjunction with the AppOne Portal System. We recommend that you download and print the documents readily available as a handy guide when utilizing our system.

- [Astra G2 Training Guide \(for IDS Dealers\)](#)

Please Note:

- You will need the latest version of Adobe Reader installed on your computer to view the Adobe Reader.

Wolters Kluwer
Financial Services

- [-] RMS Quick-Start Training Guide
- [-] Get Started
- [-] Set Up Lenders, Systems Defaults, and Forms
- [-] Create a Deal
- [-] Additional Tasks
- [-] Frequently Asked Questions
- [-] AppOne Contacts

Publication Information/Version
AppOne RMS Quick Start Training Guide
Original Publication Date: January 2011
Revision Date: October 2013

Fees Displayed on Deal Structure Based on Collateral Type

The REC portal was updated to show fees appropriate to the collateral type on the **Structure** tab. The update was made due to a Compliance Services request that the portal **Structure** tab display fees that match the fields available in the goods and services and the motor vehicle contracts (based on state and collateral type).

- Fees displayed in the **Admin Console** tab will be configured for dealer state regardless of collateral type.
- Fees that displayed in **Structure** tab will be specific to dealer state and collateral type. The fees will default to the appropriate values in the **Admin Console** tab.

All fees applicable for the state the dealer is doing business in are available on the **Admin Console** tab. However, *only* the fees applicable to the collateral type selected for the deal are pulled into the **Structure** tab and calculations...

The following table shows fee names by state and collateral type.

State	Fee Name for Auto, RV, Motorcycle	Fee Name for all other collateral
ID	Additional Charge (Documentation Fee)	Documentation Fee
UT	Additional Charge (Documentation Fee)	Documentation Fee
VA	Processing Fee	Documentation Fee
AL	Processing Fee	Documentation Fee
KY	Processing Fee	Documentation Fee
MD	Dealer Processing Charge	Documentation Fee
TN	Document Preparation Fee	Documentation Fee
SC	Closing Fee	Documentation Fee
CA	Document Processing Charge	Documentation Fee

Example:

Admin Console → System Default shows all fees set up for the dealer state

Code	Name	Rate	Amount	Taxable	Modified
doc	Documentation Fee	-	5.00	<input type="checkbox"/>	11/26/2013 3:27 PM
license	License Fee	-	10.00	<input type="checkbox"/>	11/26/2013 3:27 PM
procfee	Processing Fee	-	20.00	<input type="checkbox"/>	11/26/2013 3:27 PM
title	Title Fee	-	15.00	<input type="checkbox"/>	11/26/2013 3:27 PM
ucc	UCC Filing Fee	-	5.00	<input type="checkbox"/>	11/26/2013 3:27 PM

The Structure tab for an RV deal (Documentation fee not configured)

Customer	Credit Bureau	Collateral	Structure	Lenders	Forms	No
----------	---------------	------------	-----------	---------	-------	----

Total Amount Financed: \$12,799.75

Front-End Itemization

Selling Price:	\$15,000.00
Trade-In Allowance:	\$0.00
Trade-In Payoff:	\$0.00
Sales/Other Tax: net 6.62500 %	\$993.75 <input type="checkbox"/> manual override
Rebate:	\$0.00
Cash Down:	\$3,250.00
Net Purchase:	\$12,743.75

Public Officials & Fees

Title Fee:	\$15.00	<input type="checkbox"/> tax
License Fee:	\$12.00	<input type="checkbox"/> tax
UCC Filing Fee:	\$8.00	<input type="checkbox"/> tax
Processing Fee:	\$21.00	<input checked="" type="checkbox"/> tax
Total Front-End:	\$12,799.75	

The Structure tab for a Marine deal (Processing fee not configured)

Customer	Credit Bureau	Collateral	Structure	Lenders
----------	---------------	------------	-----------	---------

Total Amount Financed: \$12,528.75

Front-End Itemization

Selling Price:	\$15,000.00
Trade-In Allowance:	\$0.00
Trade-In Payoff:	\$0.00
Sales/Other Tax: net 6.62500 %	\$993.75 <input type="checkbox"/> manual override
Rebate:	\$0.00
Cash Down:	\$3,500.00
Net Purchase:	\$12,493.75

Public Officials & Fees

Title Fee:	\$15.00	<input type="checkbox"/> tax
License Fee:	\$10.00	<input type="checkbox"/> tax
Documentation Fee:	\$5.00	<input checked="" type="checkbox"/> tax
UCC Filing Fee:	\$5.00	<input type="checkbox"/> tax
Total Front-End:	\$12,528.75	

MarineOne ELT Code Update

MarineOne ELT lienholder codes were updated for multiple states for all of their existing programs. Additionally, the ELT code and title application will now print for the customer's state versus the dealer's state.

RV Collateral - DocOne XML

The portal tab page was updated such that when **Recreational Vehicle** collateral type is selected, the **Class Type** field will print in the forms' **Body Style** fields, and the **Length** field in the forms' **Length** fields. For other collateral types, such as Marine, ATV, and Trailer, the input from the **Length** field continues to print in the forms' **Body Style** fields.

App ID: 38753 Customer Name: JIM WALKER

Customer | Credit Bureau | Collateral | Structure | Lenders | Forms | Notes

Save

Collateral Information

Collateral Type: RecreationalVehicle Inventory Stock Number:

Type: Used ClassType: CLASS A DIESEL

Year: 1997 Serial Number: 1J4FY19S2VP433647

Make: JEEP Model: WRANGLER

Length: 35 Mileage: 1,200

Invoice/Dealer Cost: \$50,000.00 Selling Price: \$55,000.00

Collateral Options

Option Name	Cost Price	Selling Price	Add Option
	\$0.00	\$0.00	Add Option

Save

Print Credit Report Button

The **Print Credit Report** button was updated to bring up the credit report bureau that is currently shown on the **Credit Bureau** tab (REC/VFI) or **Credit Reports** tab.

App ID: 39327 Customer Name: GERALD CREDCO

Credit Bureau | Collateral | Structure | Lenders | Forms | Notes

Equifax

Pull New Report Bypass Bureau Errors

GERALD CREDCO

```
REF:3-00140-50447-0000 10/11/2013 TID:3-00140-50447 10/11/2013 13:30:40
Credco Executive Summary Acct: 4006920
Prepared for: TEST APPONE/CYRUS - CAR Notes: IM
App: CREDCO SR, GERALD Dob: 05/05/81 Ssn: XXX-XX-9852
Curr Addr: 5468 MONTEZUMA RD #11, SAN DIEGO, CA 92115
```

Equifax

REF:3-00140-50447-0000 10/11/2013 TID:3-00140-50447 10/11/2013 13:30:40
Credco Executive Summary Acct: 4006920
Prepared for: TEST APPONE/CYRUS - CAR Notes: IM

App: CREDCO SR, GERALD Dob: 05/05/81 Sen: XXX-XX-9852
Curr Addr: 5468 MONTEZUMA RD #11, SAN DIEGO, CA 92115

BUREAU SCORE INFORMATION

Backend Products Contract Validation Rules

The restriction on validation rules was relaxed to allow non-RMS lenders, with the exception of 5 integrated REC lenders, to add any backend product. The five integrated lenders have restrictions put in place for the allowable backend products.

The following warnings were found on this form:

Code: 980. Message: Bank of America only allows Vehicle Service Contract, GAP, Credit Life, Credit Disability, Tire & Wheel and Roadside assistance to be financed. Please check with your lender directly if you have any additional questions.

Update BMO Harris EIN # for Iowa

(Deployed 12/3/13)

SourceOne requested a change the BMO Harris EIN # for the state of Iowa. Code will be 36-2085229

Update Links to Videos

(Deployed 11/19/13)

The training video links have been updated in the Rec 2012 portal.

Online Training Videos

Our Product Team has created online training videos that you can access and view at any time to learn more about the REC 2012 portal. These videos have been designed in a manner that follows the chronological order of the workflow in how you will be using the REC 2012 portal to submit documents. To access these training videos, simply click on one of the links below based upon the task you are performing.

- [Getting Started](#)
- [REC Portal Overview](#)
- [Submitting an Application](#)
- [Printing Documents](#)

Change Term and Deductible in Premier Protect Plan (VSC)

The term and deductible was changed for Tracker Marine's VSC product.

Premier Protection Plans
Premier Pre-Owned - Inboard
Only Inboard/Stern Drives (Mercruiser) - 36 Months
0-3.0 Liter
36 months
\$100 Deductible
\$100 Deductible
Protection Plans - Inboard Inboard/Stern Drives (Mercruiser) - 36 Months 0-3

CL/CD Rates Update for MO

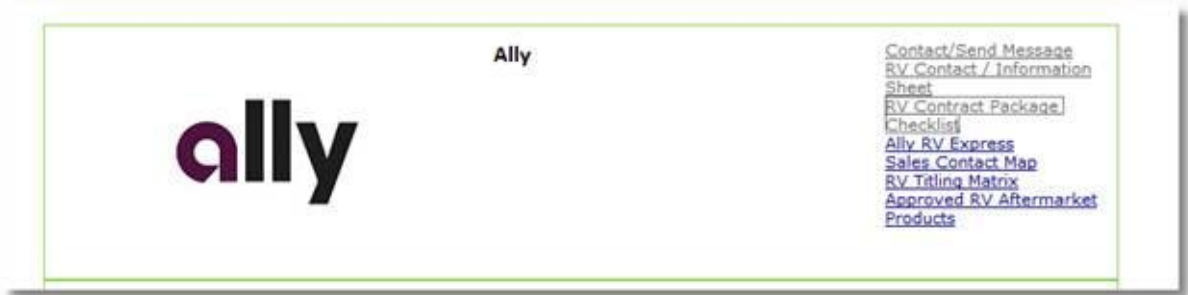
The CL/CD rates were updated for the state of Missouri for Tracker Marine.

Turn Off Credit Insurance in NJ and WV

Both Credit Life (CL) and Credit Disability (CD) in New Jersey and West Virginia were disabled for Tracker Marine.

Add Ally Logo to Lenders tab

An Ally section with the logo has been added to the Lenders tab on the REC portal.



Performance Tuning

Performance tuning was done to enhance the overall user experience.

Trade In Year Error

The REC 2012 portal was enhanced to allow selection of the current year as the trade-in year. The Structure page Trade-In Information section Year field now accepts any valid year.

Trade-In Information

Trade-In #1 Information

Serial #: Year: Make: Model:

Mileage: Lien Holder: Phone: Account #:

Update Portal.AppOne.net Link

(Deployed 12/17/13)

We have addressed an issue that SupportLine escalated regarding the URL for the AppOne REC portal in the Support tab.

Click the questions below to see the associated answer.

How do I submit a new credit application?
Log on to [Portal.AppOne.net](https://portal.appone.net) and click on the blue 'Submit Application' button.

Fill in your customer's information, then click on the gray 'Submit Application' button to submit the information and click the gray 'Submit Application' button.

