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INTERNAL

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Table of Contents

Items of Interest to all Portals.....	1
Sprint 1	1
PBI #246817 - All Portals - Online Signup - Update How Heard.....	1
Sprint 2	2
Sprint 3	2
All Portals- Calculation Enhancements.....	2
Interest Accrual Basis	2
Buy Here Pay Here (BHPH)	2
Structure tab changes:.....	3
PBI #247120 - All Portals - AppOne DMS connect response - terms/stipulations	5
PBI #251120 - All Portals - Swap applicants on existing applications.....	5
Items of Interest to RMS	6
Sprint 1	6
PBI #245300 - RMS - Rate Markup Change	6
PBI #244690 - RMS - GOLF LienHolder Code MT	7
PBI #244691 - RMS - MT Lien Registration Requirements Update	7
PBI #245221 - RMS - GOLF - Remove Max Loan Amount on Callbacks	8
PBI #246853 - RMS - CPS dealer agreement doc updates	8
PBI #227590 - RMS - Fix images on the Products tab	8
Sprint 2	9
PBI #246851 - RMS - Mandatory STIP for new dealers - Form 4506T	9
PBI #249182 - RMS - Update Rate Markup	9
PBI #243124 - Moses - Queue Cleanup - Frameworks	10
PBI #251241 - Moses - AppOne platform billing - update SAP material numbers	10
PBI #215727 - Moses - Notes - Dealer Support queue.....	11
Sprint 3	12
PBI #253285 - Moses - Enhancement: fix character limitations for lender comments.....	12
PBI#253337 - RMS - GOLF - Activate WY/HI/MA	12
PBI #253340 - RMS - Re-activate GOLF dealers	12
PBI #255232 - RMS - MD Processing Fee Change	13
PBI #255234 - RMS - WFDS - App Filter Changes.....	13
Sprint 4	15
PBI #162288 - Moses/RMS - Set up for New Dealer Approval Email (SP#4099)	15
Approval Email Example	15
PBI #256300 - RMS - Update Wells Filters	15
PBI #256743 - RMS - Fix Lender Production Report	16
Items of Interest to RMS and REC	16
Sprint 1	16
PBI #246803 - RMS/REC - Lender Pending Transmission - Enhancement.....	16

Sprint 2	17
PBI #234022 - RMS/REC - Update Support Tab Link to RH	17
Sprint 3	18
PBI #201105 - RMS/REC - Online Credit App	18
PBI #192307 - RMS/REC/VFI Tax for TX not working including if amount is .0%	19
Sprint 4	20
PBI #226071- RMS/REC/VFI 2012 - Admin Console - Enable CREDCO/DMS Interfaces	20
PBI #257159 - RMS/REC/VFI 2012 - Failed Fax Transmission Alerts	21
Items of Interest to REC.....	23
Sprint 1	23
PBI #244897 - REC - Ally Lienholder Address Change in MI	23
PBI #345552 - REC - Fix Misspelled City Name for Aqua Finance	23
PBI #246850 - REC - MB Financial - Update Name	23
Sprint 2	24
PBI #244930 - REC - AppOne Connect importing collateral age incorrectly	24
PBI #244932 -- REC -AppOne Connect Setting DOB when none is sent	24
PBI #245809 - VFI- Dealer Management Issue	25
PBI #246947 - REC/VFI - Funded applications unmarked if marked dead	26
PBI #143664 - REC/VFI 2012 - Add Mark Apps Dead & Re-activate Feature	26
Sprint 3	27
PBI #249190 - REC - Online Dealer Signup - Dropdown list values now populated with values in the database	27
PBI #254338 - REC - Merrick callback mapping issue	29
PBI #237725 - REC/VFI 2012 - Dealers unable to remove Trade-In #1	30
Before removing Trade-In #1.....	30
After removing Trade-In #1	30
Sprint 4	30
PBI #237861 - REC 2012 - DocOne Web Demo Trial Function	30
PBI #200120 - REC/VFI 2012 - Expand availability of "Mark Deal Funded" Button	31
Content Items	33
Sprint 2	33
PBI #248736 - SR 1362654 - Epic Request - SC boat title application- new form	33
PBI #247469 - SR 1360778 - CW Request - NC MVR 181 - two added versions	33
PBI #247468 - SR 1360778 - CW Request - NC MVR 180 - two added versions	33
PBI #247467 - SR 1360778 - CW Request - NC MVR 63 - two versions	33
PBI #247466 - SR 1360778 - CW Request - NC MVR 2 - one version	33
PBI #252856 - BSI 2014.2 - New Revision of Goods and Services Retail Installment Contract with Arbitration (SC) RSSIGSLFAZ-SC.....	33
PBI #256404 - Updating DB status of Outdated Forms.....	34
PBI #258084 - RMS Request - Reminder form for Co-X Initials	34

INTERNAL

Note:

The Quick Start Training Guides and user help systems were also updated for this release. You can find them at the following links:

[RMS](#)

[REC/VFI](#)

Items of Interest to all Portals

Sprint 1

PBI #246817 - All Portals - Online Signup - Update How Heard

(Deployed 7/15/2014)

On the dealer signup page, **How Did You Hear About Us** list; and on the Moses **Dealer Profile** page, **How Heard** field, we made the following changes:

- Removed items that begin with **BDM**.
- Added **NIADA**.

The options for **How Did You Hear About Us** and **How Heard** are now:

- Website
- Direct Mail
- Referred by Someone
- Previous Customer
- Email
- Sales Call
- Search Engine - Overture
- Search Engine - Google
- Search Engine - MSN
- Search Engine - Yahoo
- Search Engine - Other
- Business Development Manager
- Finance Express
- Dealers Association
- Lender Referral
- Lender Setup
- Press Release
- Industry Publication

- Service Company Referral
- Service Company Setup
- NIADA

Sprint 2

Sprint 3

All Portals- Calculation Enhancements

AppOne has made several enhancements to its deal structure calculations within all portals to support a variety of new features as further defined below.

Interest Accrual Basis

Previously, AppOne only supported the 30/360 method of accruing interest in its calculations. Now, it has been updated to support all of the options below:

- Actual/365
- 30/360

Buy Here Pay Here (BHPH)

Buy Here/Pay Here (BHPH) is a lending method utilized primarily by automotive dealers wherein the dealer himself acts as the lender to the customer and self-finances the customer, instead of submitting deals to 3rd party lienholders.

The following additional options were added to the term drop-down to support BHPH calculations:

- Weekly
- Bi-Weekly
- Semi-Monthly

Additionally, we have added a new lender level program parameter which will be used to configure the lender's accepted payment term schedules. This parameter will be set for all AppOne integrated lenders, and, when set, the dealer will not be allowed to change this option when printing a deal for the selected AppOne integrated lender. Most integrated lenders on AppOne today only support Monthly terms and as a result, dealers printing deals for these integrated lenders will be limited to Monthly terms only.

We also added new fields used to capture Deferred Down Payments which are typically used in BHPH transactions where the dealer makes an arrangement with the customer to defer some portion of the total cash down required over a period of time, **but no later than the 2nd regularly scheduled payment date**. We also added a lender level program parameter which will be used to configure if an integrated lender accepts deferred down payments or not. Most integrated lenders on AppOne today do not accept deferred down payments and as a result dealers will not be allowed to print deals for them if they contain a deferred down payment.

To support the calculation enhancements, we made the user interface changes described below.

Structure tab changes:

In the **Structure** tab, we made the following changes:

- In the **Front-End Itemization** section, added a **Deferred Down Payment?** Link that opens a **Deferred Down Payment** popup.

Deferred Down Payment

How much of the down payment is deferred?

Payable in payments of beginning

All deferred down payments must be due no later than the second regularly scheduled payment of 10/19/2014

- In the **Rate & Terms** section, added a term frequency drop-down list to the right of the **# of Payments** field. Possible values are **Weekly**, **BiWeekly**, and **SemiMonthly**.
- In the **Rate & Terms** section, added an interest accrual drop-down list to the right of the **Rate** field. Note that the APR will change when the interest accrual method changes. Possible values are:
 - Actual/365
 - 30/360
- In the **Rate & Terms** section, added a drop-down list to the right of the **Last Payment Date** field. Possible values are **calculate even payments** and **calculate final payment**. When **calculate final payment** is selected, a **Final Payment** field is displayed at the top and bottom of the screen.

AppOne Portal Rate and Terms:

Rate & Terms

of Payments:

Rate: APR: 5.1765%

Contract Date:

Days to First Payment:

First Payment Date:

Last Payment Date:

Misc Info

Sales Person Name:

F&I Person Name:

Total Balance Due: \$16,570.00 Total Sales Tax Amount: \$1,500.00 Payment: \$312.72 Final Payment: \$312.18

When forms are printed, the payment schedule will reflect the selections made. The following examples show contracts with different configurations of **Deferred Down Payment** and **calculate even payments/ calculate final payment**.

No Deferred Down payment, calculate even payments:

Truth-In-Lending Disclosure				
Annual Percentage Rate The cost of your credit as a yearly rate.	Finance Charge The dollar amount the credit will cost you.	Amount Financed The amount of credit provided to you or on your behalf.	Total of Payments The amount you will have paid when you have made all scheduled payments.	Total Sale Price The total cost of your purchase on credit, including your down payment of
8.97%	\$ 1,556.36	\$ 19,371.64	\$ 20,928.00	\$ 2,000.00 \$ 22,928.00
Payment Schedule. Your payment schedule is:				
No. of Payments	Amount of Payments	When Payments are Due		
20	\$ 1,046.40	Monthly, beginning on 9/24/2014 .		
N/A	\$ N/A	NOT APPLICABLE		
N/A	\$ N/A	NOT APPLICABLE		

No Deferred Down payment, calculate final payment:

Truth-In-Lending Disclosure				
Annual Percentage Rate The cost of your credit as a yearly rate.	Finance Charge The dollar amount the credit will cost you.	Amount Financed The amount of credit provided to you or on your behalf.	Total of Payments The amount you will have paid when you have made all scheduled payments.	Total Sale Price The total cost of your purchase on credit, including your down payment of
8.971%	\$ 1,556.39	\$ 19,371.64	\$ 20,928.03	\$ 2,000.00 \$ 22,928.03
Payment Schedule. Your payment schedule is:				
No. of Payments	Amount of Payments	When Payments are Due		
19	\$ 1,046.40	Monthly, beginning on 9/24/2014 .		
1	\$ 1,046.43	Final payment due on 4/24/2016.		
N/A	\$ N/A	NOT APPLICABLE		

Deferred Down payment, calculate final payment:

Truth-In-Lending Disclosure				
Annual Percentage Rate The cost of your credit as a yearly rate.	Finance Charge The dollar amount the credit will cost you.	Amount Financed The amount of credit provided to you or on your behalf.	Total of Payments The amount you will have paid when you have made all scheduled payments.	Total Sale Price The total cost of your purchase on credit, including your down payment of
8.971%	\$ 1,556.39	\$ 19,371.64	\$ 21,428.03	\$ 2,000.00 \$ 22,928.03
Payment Schedule. Your payment schedule is:				
No. of Payments	Amount of Payments	When Payments are Due		
2	\$ 250.00	Weekly, beginning on 8/25/2014 (Deferred Down Payment).		
19	\$ 1,046.40	Monthly, beginning on 9/24/2014 .		
1	\$ 1,046.43	Final payment due on 4/24/2016.		

PBI #247120 - All Portals - AppOne DMS connect response - terms/stipulations

We updated the AppOne DMS Connect Response schema to support and return all terms or stipulations for each lender transmission. The following fields were added to the schema for each lender transaction:

- BuyRate
- MaxRate
- Amount - approved amount
- Term
- VSC
- GAP
- BackEndAmount
- BuyerName
- BuyerPhone
- Comments (comments, notes, lender comments, decision comments, decline reasons, stipulations)
 - Type
 - Text
 - User
 - IsSatisfied

PBI #251120 - All Portals - Swap applicants on existing applications

We corrected an issue that prevented a user from adding an applicant to an existing application and using the **Swap Applicants** button. The user can now add an applicant and use the **Swap Applicants** button without generating an error.

Items of Interest to RMS

Sprint 1

PBI #245300 - RMS - Rate Markup Change

(Deployed 6/12/2014)

We updated the rate markup for the Dealer Buy Rate to 1.5% for the following RMS lenders:

- AmeriCredit Financial (AMC)
- Wells Fargo Dealer Services (WFDS)
- Credit Union Acceptance Corp (CUAC)
- Gateway One Lending and Finance (GOLF)
- Meritrust Credit Union
- Crescent Bank and Trust (CBT)

In addition, for CBT, the used car fee was set to \$0 and all admin fees were set to \$200.

#	BK	Sent	Recvd	Tran	Ref	Buyer	Dec	Tier	Notes	CB1	COP	MR	MT	DBR	MAMT	MADV	MPMT	MCDI	MVSC	MGAP	MINS	MLN	TE	REFS	OTRBKEND
29894	Crescent Bank & Trust	6/12/2014 4:08 PM	6/12/2014 4:13 PM	C	5104886	ELLIS JONES				E	2.25 %	3.25 %	60	3.25 %	\$24,500	0 %	\$0	\$0	\$2,000	\$695	\$0	\$0	\$0	2	<input checked="" type="checkbox"/>

2.25 with 1 point mark-up

#	BK	Sent	Recvd	Tran	Ref	Buyer	Dec	Tier	Notes	CB1	COP	MR	MT	DBR	MAMT	MADV	MPMT	MCDI	MVSC	MGAP	MINS	MLN	TE	REFS	OTRBKEND	
29894	Crescent Bank & Trust	6/12/2014 4:08 PM	6/12/2014 4:13 PM	C	5104886	ELLIS JONES				E	2.25 %	4.25 %	60	3.75 %	\$24,500	0 %	\$0	\$0	\$2,000	\$695	\$0	\$0	\$0	\$0	2	<input checked="" type="checkbox"/>

2.25 with 2 point mark-up

Lender Fees		
Type	Label	Amount
LenderPayable	ACQUISITION FEE	\$75.00
LenderPayable	ASSIGNMENT FEE	\$99.00
DealerReceivable	ADMIN FEE	\$200.00
DealerReceivable	OLD CAR FEE	\$0.00
DealerReceivable	DEALER FEE	\$274.00
LenderReceivable	FLAT FEE - APPONE	\$0.00

CBT fee changes

PBI #244690 - RMS - GOLF LienHolder Code MT

(Deployed 6/17/2014)

We updated the lienholder code for Gateway One Lending and Finance (GOLF) to **208012372** for the state of Montana.

Lender Addresses						
Type	Code	Name	Address1	Address2	City	St
Insurance		Gateway One Lending &	P.O. Box 1013		Atwood	
Contract	moses	Wolters Kluwer Financia	6815 Saukview Drive		St. Cloud	
Lien	20801	Gateway One Lending &	P.O. Box 1013		Atwood	

No - go to Section D			
Yes - complete this section and submit a filing fee of \$8 for each security interest or lien.			
Name of First Secured Party or Lienholder: Gateway One Lending & Finance		DL/FEIN/Tribal ID/Corp ID* 208012372	
City: Atwood	State: CA	Zip Code: 92811	
Name of Second Secured Party or Lienholder:		DL/FEIN/Tribal ID/Corp ID*	

PBI #244691 - RMS - MT Lien Registration Requirements Update

(Deployed 6/17/2014)

We updated the **Urgent!! Urgent!! Deal Ready for Funding** notice for the state of Montana to include the following text:

3. TRP - Temporary Registration Permit

URGENT!! URGENT!! DEAL READY FOR FUNDING NOTICE			
Dealer:	DO NOT TOUCH RMS Auto Sales MT	Phone:	555-231-4646
Date:	6/13/2014	Deal #:	46237
Contact:	Funding Department	Phone:	877-277-6631 x 5
Fax:		Fax:	888-873-2573
Applicant:	TEST TESTER	Co-Applicant:	-
Vehicle:	2012 NISSAN ALTIMA-4 CYL (2500 miles)		
<p>This contract is ready for funding. To complete the funding process we require valid proof of lien perfection before we will release funds. Please fax this cover sheet and the documents listed below to 888-873-2573.</p> <p>Lien Perfection Requirements:</p> <p>Dealer must provide AppOne with the following item(s) to be funded:</p> <ol style="list-style-type: none"> Copy of Security Interest filing receipt from County Treasurer's office. Copy of the Security Interest filing assignment with lienholder listed and any separate reassignments, if applicable. TRP - Temporary Registration Permit <p>**Attention on all out of state deals** To avoid funding delays please contact our Registration Department at 1-877-277-6631 option 5 regarding required documentation for out of state deals.</p> <p>Delay in funding may occur if the lienholder name and/or address is incorrect. Please verify that the lienholder name and address on your registration paperwork matches the information we have listed below.</p>			

PBI #245221 - RMS - GOLF - Remove Max Loan Amount on Callbacks

(Deployed 6/17/2014)

We updated the Max Loan Amount on GOLF lender callbacks to blank.

Slips	Del	H	#	BK	Sent	Recvd	Tran	Ref	Buyer	Dec	Tier	Notes	CB1	CB2	MVSC	REFS	COP	MR	MT	DBR	MANT	MADV	MPMT	MCD	MLN	TE
			29903	Gateway One Lending & Finance	6/13/2014 12:02 PM	6/13/2014 12:02 PM	C	00032541	SCOTT DEMAND	A			E	E	\$2,000	3	14.99 %	16.99 %	54	16.49 %	\$12,853	0 %	\$0	\$0	\$0	\$0

PBI #246853 - RMS - CPS dealer agreement doc updates

(Deployed 7/15/2014)

We updated RMS Dealer Agreement Package for CPS deals to include a CPS Bluesheet (Dealer Activation Form) and updated the CPS dealer agreement signature area.

PBI #227590 - RMS - Fix images on the Products tab

(Deployed 7/15/2014)

We corrected an issue that prevented product images from displaying correctly on the Products tab. All images now display correctly.

- AMC - Buy rate +0.5
- WFDS- Buy rate +0.5
- CUAC- Buy rate +0.5
- GOLF- Buy rate +0.5
- MeriTrust- Buy rate +0.5
- CBT- Buy rate +0.5

Bank Transmission Log														
Stips	Sel	D	H	#	BK	Sent	Recvd	Tran	Ref	Buyer	Dec	Tier	Notes	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			30103	Meritrust Credit Union	dnaquin 7/3/2014 3:09 PM	parammsks 7/3/2014 3:09 PM	C	15733	THOMAS JOHNSON	A	A	225-923-4994	CB1: E COF: 9.75 % MR: 11.75 % MT: 60 DBR: 10.25 % CB2: E MAMT: \$18,000 MADV: 0 % MPMT: \$0 MCD: \$2,000 MVSC: \$3,000 MGAP: \$800 MINS: \$0 MLN: \$0 TE: \$0 REFS: 2 OTRBKEND: <input checked="" type="checkbox"/> maxinsuranceaddon

Bank Transmission Log														
Stips	Sel	D	H	#	BK	Sent	Recvd	Tran	Ref	Buyer	Dec	Tier	Notes	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			30102	Gateway One Lending & Finance	dnaquin 7/3/2014 2:46 PM	dnaquin 7/3/2014 2:51 PM	C	15733	THOMAS JOHNSON	A	A	225-923-4994	CB1: E COF: 9.75 % MR: 11.75 % MT: 60 DBR: 10.25 % CB2: E MAMT: \$18,000 MADV: 0 % MPMT: \$0 MCD: \$2,000 MVSC: \$2,000 MGAP: \$750 MINS: \$0 MLN: \$0 TE: \$0 REFS: 3 OTRBKEND: <input checked="" type="checkbox"/>

Bank Transmission Log														
Stips	Sel	D	H	#	BK	Sent	Recvd	Tran	Ref	Buyer	Dec	Tier	Notes	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			30096	Crescent Bank & Trust	dnaquin 7/3/2014 2:23 PM	dnaquin 7/3/2014 2:28 PM	C	15732	THOMAS JOHNSON	A	A	225-923-499	CB1: E COF: 16.25 % MR: 18.25 % MT: 60 DBR: 16.75 % CB2: E MAMT: \$22,500 MADV: 0 % MPMT: \$0 MCD: \$2,500 MVSC: \$2,000 MGAP: \$695 MINS: \$0 MLN: \$0 TE: \$0 REFS: 2 OTRBKEND: <input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			30095	Wells Fargo Dealer Services	dnaquin 7/3/2014 2:23 PM	dnaquin 7/3/2014 2:30 PM	C	15732	THOMAS JOHNSON	A	B	225-923-4994	CB1: E COF: 5.00 % MR: 7.00 % MT: 60 DBR: 5.50 % CB2: E MAMT: \$22,500 MADV: 0 % MPMT: \$0 MCD: \$2,500 MVSC: \$1,795 MGAP: \$895 MINS: \$0 MLN: \$22,500 TE: \$0 REFS: 2 OTRBKEND: <input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			30094	AmeriCredit Financial Services	dnaquin 7/3/2014 2:23 PM	dnaquin 7/3/2014 2:31 PM	C	15732	THOMAS JOHNSON	A	B	225-923-4994	CB1: E COF: 9.50 % MR: 11.50 % MT: 60 DBR: 10.00 % CB2: E MAMT: \$22,500 MADV: 0 % MPMT: \$0 MCD: \$2,500 MVSC: \$2,500 MGAP: \$895 MINS: \$0 MLN: \$0 TE: \$0 REFS: 2 OTRBKEND: <input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			30093	Credit Union Acceptance Corp	dnaquin 7/3/2014 2:23 PM	dnaquin 7/3/2014 2:36 PM	C	1257220	Michael Garland	C	B		CB1: E COF: 4.61 % MR: 6.61 % MT: 48 DBR: 5.11 % CB2: E MAMT: \$4,599 MADV: 0 % MPMT: \$0 MCD: \$0 MVSC: \$2,500 MGAP: \$800 MINS: \$1,732 MLN: \$0 TE: \$0 REFS: 2 OTRBKEND: <input checked="" type="checkbox"/>

PBI #243124 - Moses - Queue Cleanup - Frameworks

(Deployed 7/29/2014)

In an effort to improve performance of the Queues on the Moses Home Page, we have implemented an archiving process that archives and purges old completed items from all the various queues in the system.

PBI #251241 - Moses - AppOne platform billing - update SAP material numbers

(Deployed 8/19/2014)

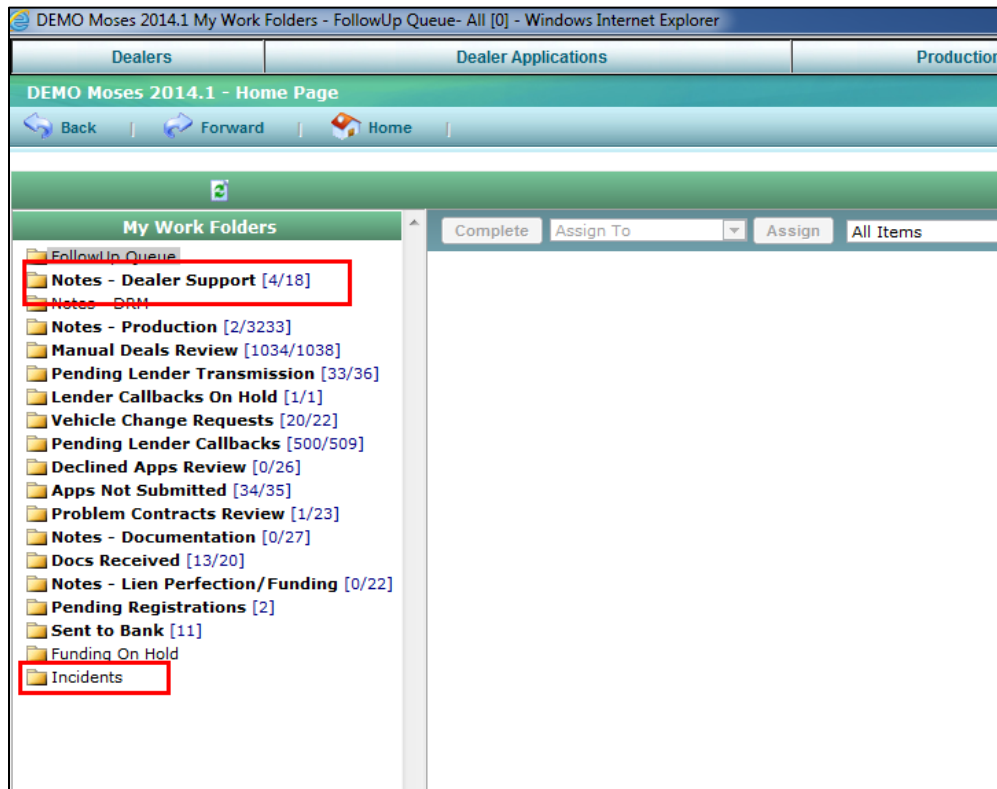
We updated the SAP Material numbers for the new AppOne Platform Billing Summary Report for all lender and organization customers.

PBI #215727 - Moses - Notes - Dealer Support queue

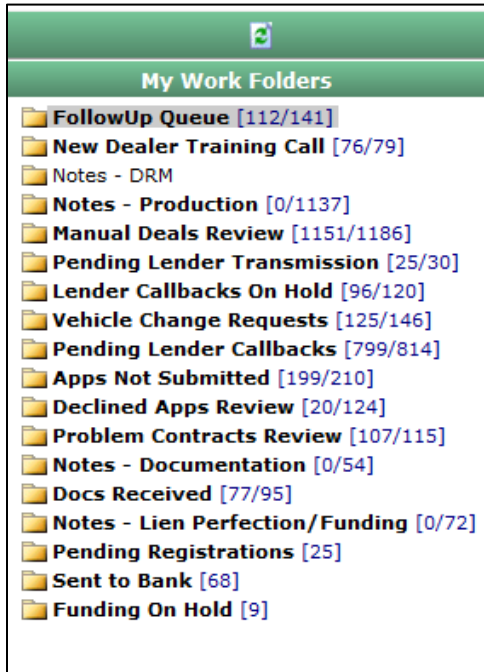
(Deployed 7/22/2014)

We disabled the **Notes - Dealer Support** and **Incidents** queues in Moses. These queues no longer appear in **My Work Folders**.

Before update



After update



Sprint 3

PBI #253285 - Moses - Enhancement: fix character limitations for lender comments

(Deployed 7/29/2014)

We enhanced the RouteOne Interface messaging capability for lender comments to handle comments longer than 120 characters. Lender comments can now be up to 700 characters without being truncated.

PBI#253337 - RMS - GOLF - Activate WY/HI/MA

(Deployed 8/5/2014)

We activated the GOLF program for Hawaii, Massachusetts, and Wyoming. All activated dealers in these states are enabled for the GOLF-RMS program.

PBI #253340 - RMS - Re-activate GOLF dealers

(Deployed 7/29/2014)

We enabled the GOLF-RMS program for more than 700 previously deactivated dealers, per a list provided by GOLF.

PBI #255232 - RMS - MD Processing Fee Change

(Deployed 8/6/2014)

The maximum processing fee (**Documentation** fee) for Maryland was increased from \$200 to \$300. We updated the **Structure** page logic to accept values up to \$300. When an application is submitted with a **Documentation** fee greater than \$300, the portal displays an error message.

The following errors were found on this form:

Documentation Fee has an invalid value. Maximum value must be \$300.00.
Code: -2. Message: Documentation Fee is invalid. Maximum value must be \$300.00.

Front-End Itemization	
Selling Price:	\$15,000.00
Trade-In Allowance:	\$0.00
Trade-In Payoff:	\$0.00
Sales/Other Tax: <input type="text" value="net"/> <input type="text" value="6.00000 %"/>	\$900.00 <input type="checkbox"/> manual override
Rebate:	\$0.00
Total Cash Down:	\$1,000.00 Deferred Down Payment?
Net Purchase:	\$14,900.00
Public Officials & Fees	
Title Fee:	\$250.00 <input type="checkbox"/> tax
License Fee:	\$7.00 <input type="checkbox"/> tax
Registration Fee:	\$500.00 <input type="checkbox"/> tax
Lien Fee:	\$100.00 <input type="checkbox"/> tax
Documentation Fee:	\$350.00 <input checked="" type="checkbox"/> tax
Dealer Processing Charge:	\$12.00 <input type="checkbox"/> tax
Total Front-End:	\$16,119.00

PBI #255234 - RMS - WFDS - App Filter Changes

(Deployed 8/6/2014)

We updated the values that are used to filter Wells Fargo Dealer Services (WFDS) applications. The applicant or applicants must meet the following criteria:

- A minimum FICO score of 580 for both applicants
- A minimum income of \$2,000.

FICO score less than 580; income less than \$2,000

	Wells Fargo Program
FICO Score	✘
Collateral Age	✓
Collateral Mileage	✓
Business Application	✓
Lending Area	✓
Time on Credit File	✓
# of Tradelines	✓
Max Loan Amount	✓
Job Time	✓
Income	✘
Notes	-
SELECT LENDER	<input type="checkbox"/>
	-

FICO score greater than 580; income greater than \$2,000

	Wells Fargo Program
FICO Score	✓
Collateral Age	✓
Collateral Mileage	✓
Business Application	✓
Lending Area	✓
Time on Credit File	✓
# of Tradelines	✓
Max Loan Amount	✓
Job Time	✓
Income	✓
Notes	-
SELECT LENDER	<input type="checkbox"/>
	-

Sprint 4

PBI #162288 - Moses/RMS - Set up for New Dealer Approval Email (SP#4099)

We updated the process for sending dealer approval emails. Previously, the approval email was sent whenever a new dealer was approved or an existing dealer completed the refresh process. Now, the approval email is sent only when a new dealer is approved. In addition, the WKFS-AppOne Sales (distribution list) was added as a set of email recipients, and Kristopher Tovsen and Penny Bearb were removed.

Approval Email Example

AppID / LocationID:	404 / 9081	Dealer:	Jim's Auto Sales	Phone:	423-447-9784	Fax:	000-000-0000
Address:	1111 , Brooklyn, NY 11211						
Partner:		Partner DealerID:		Partner AgentID:			

The dealer listed above has received final approval to do business with us. The next step is for them to receive a welcome call from our Dealer Support department and subsequently to start submitting consumer credit applications through our portal.

PBI #256300 - RMS - Update Wells Filters

(Deployed 8/19/2014)

We added criteria that are used to filter Wells Fargo Dealer Services (WFDS) applications. The application must now meet the following criteria:

- A loan-to-value (LTV) ratio greater than 155%.
- A payment-to-income (PTI) ratio greater than 16%.

Wells Fargo Program	
FICO Score	✘
Collateral Age	✔
Collateral Mileage	✔
Business Application	✔
Lending Area	✘
Time on Credit File	✘
# of Tradelines	✘
Max Loan Amount	✔
Job Time	✔
Income	✘
PTI	✘
Max Advance	✘
Notes	
SELECT LENDER	<input type="checkbox"/>

Payment/Income exceeds 16%.

Deal Structure exceeds max. line 3 advance of 155%.

PBI #256743 - RMS - Fix Lender Production Report

(Deployed 9/7/2014)

We optimized the queries on the Internal and External Lender Production Reports. Both reports now run without timeout issues with at least a year's amount of data.

Items of Interest to RMS and REC

Sprint 1

PBI #246803 - RMS/REC - Lender Pending Transmission - Enhancement

(Deployed 7/8/2014)

We enhanced the lender pending transmission process by adding the dealership's organization (**Service Company**) to the email notification to the lenders. The notification now contains the following columns:

- AppOne LotID
- Service Company
- DealerName
- Lender DealerID
- AppOne AppID
- Lender AppID
- Customer Name
- Sent Date/Time
- SentUser

Pending Applications Notification								
AppOne LotID	Service Company	Dealer Name	Lender DealerID	AppOne AppID	Lender AppID	Customer Name	Sent DateTime	Sent User
7421	Tracker Marine Financial Services, Inc	DO NOT TOUCH TMFS Marina Sales LA		18788	0	DIANE TESTCO	Jun 11 2009 3:49PM	tmfsla
7327	Tracker Marine Financial Services, Inc	DO NOT TOUCH TMFS Marina Sales MS	unknown	19220	0	KAREN TESTCO	Jan 25 2010 12:27PM	tmfsKishala
7421	Tracker Marine Financial Services, Inc	DO NOT TOUCH TMFS Marina Sales LA		19239	0	HARVEY HOMELOAN	Feb 5 2010 2:03PM	tmfsla
7421	Tracker Marine Financial Services, Inc	DO NOT TOUCH TMFS Marina Sales LA		19243	0	CHARLES RIEMER	Feb 8 2010 5:08PM	tmfskristen
7421	Tracker Marine Financial Services, Inc	DO NOT TOUCH TMFS Marina Sales LA		19244	0	ALVIN TESTCO	Feb 9 2010 2:05PM	tmfskristen
7421	Tracker Marine Financial Services, Inc	DO NOT TOUCH TMFS Marina Sales LA		19245	0	APPLICATION TESTING INC	Feb 9 2010 2:10PM	tmfskristen
7421	Tracker Marine Financial Services, Inc	DO NOT TOUCH TMFS Marina Sales LA		19247	0	KRISTEN TEST	Feb 9 2010 2:25PM	marinetest
7421	Tracker Marine Financial Services, Inc	DO NOT TOUCH TMFS Marina Sales LA		19248	0	KRISTEN TEST	Feb 9 2010 2:34PM	marinetest
7421	Tracker Marine Financial Services, Inc	DO NOT TOUCH TMFS Marina Sales LA		19249	0	OTTO OVERDRAWN	Feb 9 2010 3:28PM	marinetest
7421	Tracker Marine Financial Services, Inc	DO NOT TOUCH TMFS Marina Sales LA		19250	0	OTTO OVERDRAWN	Feb 9 2010 5:11PM	marinetest
7421	Tracker Marine Financial Services, Inc	DO NOT TOUCH TMFS Marina Sales LA		19255	0	ADAM PETTY	Feb 11 2010 3:48PM	tmfskristen
7421	Tracker Marine Financial Services, Inc	DO NOT TOUCH TMFS Marina Sales LA		19258	0	ADAM PETTY	Feb 10 2010 6:07PM	marinetest
7421	Tracker Marine Financial Services, Inc	DO NOT TOUCH TMFS Marina Sales LA		19259	0	ADAM PETTY	Feb 10 2010 5:37PM	tmfskristen
7421	Tracker Marine Financial Services, Inc	DO NOT TOUCH TMFS Marina Sales LA		19260	0	HANNAH SPICER	Feb 10 2010 5:42PM	tmfskristen
7421	Tracker Marine Financial Services, Inc	DO NOT TOUCH TMFS Marina Sales LA		19261	0	APPLICATION TESTING INC	Feb 10 2010 5:47PM	tmfskristen
7737		DO NOT TOUCH IWP Sales LA		19262	0	CHARLES RIEMER	Feb 12 2010 5:05PM	KDavis

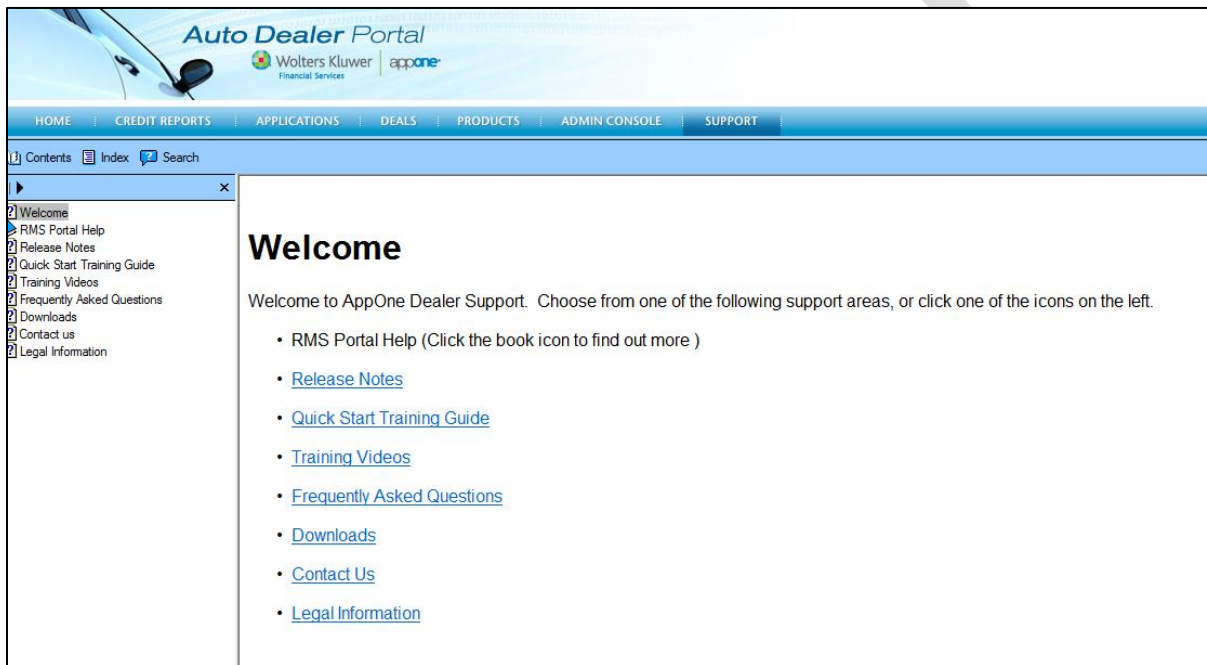
Sprint 2

PBI #234022 - RMS/REC - Update Support Tab Link to RH

(Deployed 7/15/2014)

We updated the support tabs of RMS and REC dealer portals to link to an HTML-based help system that includes online help; FAQ's; and links to quick start guides, training videos, and other support information.

RMS Portal Support Tab



REC Portal Support Tab

The screenshot shows the 'Specialty Dealer Portal' interface. The top navigation bar includes 'HOME', 'CREDIT REPORTS', 'LENDERS', 'ADMIN CONSOLE', and 'SUPPORT'. Below the navigation bar, there are links for 'Contents', 'Index', 'Search', and 'Glossary'. A sidebar on the left contains a tree view of help topics, with 'Introduction' selected under 'REC Portal Help'. The main content area displays the title 'Introduction' and the text: 'Welcome to the REC portal help system. Click a book icon for information on using the portal.'

Sprint 3

PBI #201105 - RMS/REC - Online Credit App

We corrected a problem caused by semicolons and other special characters in the **Credit App Submission Disclaimer Text** field. The portal now removes special characters from the disclaimer text, and credit application submission works correctly regardless of special characters in the disclaimer text.

The screenshot shows the 'Online Credit App' configuration page. The page title is 'Online Credit App'. There is a checkbox labeled 'Enable the Online Credit App feature for my dealership'. Below this, there are several input fields: 'Unique Website Folder Name' (with the value 'OnlineCreditApp!!!' and a note 'e.g. abcmotors, jakesrworld etc.'), 'Notification Email Addresses' (with the value 'example@email.com' and a note 'Enter one or more email addresses separated by semi-colons where you want to be notified when a new credit app is submitted by a consumer.'), and 'Website Theme' (with a 'Preview' link). A large text area contains the 'Credit App Submission Disclaimer Text' with the following text: 'I am interested in purchasing or leasing a vehicle from Hanks's RVS and hereby authorize Hanks's RVS to retrieve my Consumer Credit Report and submit my credit application to one or more affiliated lenders, at no cost to me, in order to help determine the types and extent of financing which may be available to me.' A 'Save' button is located at the bottom right of the page.

PBI #192307 - RMS/REC/VFI Tax for TX not working including if amount is .0%

We corrected an issue with the Vehicle Inventory Tax (VIT) for Texas. . Previously, if the user entered a money factor (%) in the Admin Console, it would not automatically be used to calculate the VIT Fee amount. Now, the % will default on the Structure page and be used in the calculation of the amount.

System Defaults

Taxes

State Sales Tax Rate: City Sales Tax:

Fees

Code	Name	Rate
depsvcfee	Deputy Service Fee	-
doc	Documentation Fee	-
inspection	Inspection Fee	-
license	License Fee	-
registration	Registration Fee	-
title	Title Fee	-
vit	Vehicle Inventory Tax	<input type="text" value="0.0025000"/>

Public Officials & Fees

Title Fee: tax

License Fee: tax

Registration Fee: tax

Inspection Fee: tax

Documentation Fee: tax

Vehicle Inventory Tax: tax

UCC Filing Fee: tax

Deputy Service Fee: tax

Total Front-End: **\$72,353.50**

Sprint 4

PBI #226071- RMS/REC/VFI 2012 - Admin Console - Enable CREDCO/DMS Interfaces

We added a new page, **3rd Party Interfaces**, to the Admin Console to give admin users the ability to enable CREDCO and DMS interfaces.

The **3rd Party Interfaces** page includes these sections:

- **Enable CREDCO.** When the **Enable CREDCO** box is checked, text boxes open for the **CREDCO Customer ID** and **CREDCO Password**.

- **Enable 3rd Party DMS/System Interface.** Allows the user to select an interface and enter a **DMS DealerID**.

For a VFI, CREDCO is enabled for the entire organization. However, the **Enable 3rd Party DMS/System Interface** section includes a **Dealer** dropdown list so that interfaces can be enabled for individual dealers.

If a non-admin user opens the **3rd Party Interfaces** page, a message informing the user to contact a dealer principal or administrator.

The **Credit Reports** tab now includes a link to the **3rd Party Interfaces** page to allow users to enable the CREDCO account.

PBI #257159 - RMS/REC/VFI 2012 - Failed Fax Transmission Alerts

We added an email alert to notify users when a faxed application transmission fails. The alert goes to email addresses set up by the user on the Admin Console, and includes the following information:

- AppID
- TransmissionID
- Customer Name
- Lender Name
- Fax Failed Error Message
- Link to Portal (REC 2012 or VFI 2012 or RMS)

Example:

-----Original Message-----

From: AppOne Alerts [<mailto:alerts@appone.net>]

Sent: Wednesday, September 03, 2014 10:05 AM

To: Naquin, Dustin; Coleman, Flint

Subject: Fax Transmission Failed - # 100000448

ApplicationID = 100000448

TransmissionID = 100000189

TESTING ALERTS

John Iceberg Bank

Fax Job #48916740 Delivery Status: CANCELLED; Fax # 000-000-0000; Delivery Message: RECIPIENT IS BLOCKED; # Attempts: 1; Last Attempt: Sep 3 2014 9:55AM

Items of Interest to REC

Sprint 1

PBI #244897 - REC - Ally Lienholder Address Change in MI

(Deployed 7/20/2014)

We updated the lienholder address for Ally in the state of Michigan to the following:

10909 McCormick Rd
Hunt Valley, MD 21031

Lender Addresses										
Type	Code	Name	Address1	Address2	City	State	Zip	Phone	Fax	Modified
Contract		Aqua Finance ATTN: Fur	1 Corporate Dr Ste 300		Wausau	WI	54402	800-234-3663		dnaquin 6/13/2014 12:23 PM
Insurance		Aqua Finance	PO Box 844		Wausau	WI	54402	800-234-3663		dnaquin 6/13/2014 12:23 PM
Lien		Aqua Finance	PO Box 844		Wausau	WI	54402	800-234-3663		dnaquin 6/13/2014 12:23 PM

Lender Addresses										
Type	Code	Name	Address1	Address2	City	State	Zip	Phone	Fax	Modified
Insurance	54321	Ally Financial	PO Box 8143		Cockeysv	MD	21030	888-925-2559	800-345-8467	dnaquin 6/13/2014 12:09 PM
Lien			10909 McCormick Rd		Hunt Vall	MD	21031	888-925-2559	800-345-8467	dnaquin 6/13/2014 12:09 PM

PBI #345552 - REC - Fix Misspelled City Name for Aqua Finance.

(Deployed 6/17/2014)

We corrected a misspelling in the city name for Aqua Finance. The Aqua Finance city name, **Wausau**, is changed and prints correctly on the documents.

PBI #246850 - REC - MB Financial - Update Name

(Deployed 7/1/2014)

We updated instances of lender name **MF Financial Bank** to **MB Financial Bank, N.A.** The change was made at the request of MB Financial.

Summary	Lender Callbacks
MB Financial Bank, N.A.	

Sel	D	H	#	BK	Sent
<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	30001	MB Financial Bank, N.A.	fcoleman 7/1/2014 12:40 PM

<input checked="" type="checkbox"/>	Marine One Acceptance Corp	Marine One Marine Program	Use this program to submit apps (electronically) and print docs for Marine collateral for MarineOne.	<input type="checkbox"/>
<input checked="" type="checkbox"/>	MB Financial Bank, N.A.	MBF Marine Program	Use this program to submit apps (electronically) and print docs for Marine collateral for MB Financial Bank.	<input type="checkbox"/>
<input type="checkbox"/>	Modelling Bank	Modelling - Marine	Use this program to submit apps and print docs for	<input type="checkbox"/>

Sprint 2

PBI #244930 - REC - AppOne Connect importing collateral age incorrectly

(Deployed 7/8/2014)

We corrected an issue that prevented AppOne Connect from correctly importing the age (**Type** field) for Marine collateral. Now, the contents of the **Type** field (**New/Used/Demo**) are imported correctly by AppOne Connect.

<input checked="" type="checkbox"/> Beat	<input checked="" type="checkbox"/> First Motor	<input checked="" type="checkbox"/> Second Motor	<input checked="" type="checkbox"/> Trailer
Type: <input type="text" value="Used"/>	<input type="text" value="Used"/>	<input type="text" value="Used"/>	<input type="text" value="Used"/>
Year: <input type="text" value="2004"/>	<input type="text" value="2002"/>	<input type="text" value="2002"/>	<input type="text" value="2004"/>
Make: <input type="text" value="Fountain Powe"/>	<input type="text" value="VM"/>	<input type="text" value="VM"/>	<input type="text" value="T Make and Model"/>
Model: <input type="text" value="29 Fever 4DR"/>	<input type="text" value="Emodel"/>	<input type="text" value="Pmodel"/>	

PBI #244932 -- REC -AppOne Connect Setting DOB when none is sent

(Deployed 7/8/2014)

We corrected an issue that prevented AppOne Connect from correctly setting a blank date of birth (**DOB** field). Now, the **DOB** field is blank when no date of birth is sent.

Applicant #1 - Personal Information (MUST MATCH DRIVER'S LICENSE)

FName: SARAH MI: LName: ADELMAN Suffix:

SSN: 654 - 46 - 5115

DOB: / /

Home Phone: 654 - 065 - 4065

Cell Phone: 650 - 465 - 0465

DL No: 654654654065C

Email:

Current Residence Information

PBI #245809 - VFI- Dealer Management Issue

(Deployed 7/15/2014)

We corrected an issue that allowed disabled dealers to appear in drop-down lists. Previously, when a dealer was deleted in the **Manage Dealers** page, the corresponding status changed to **Disabled**, but the dealer's name continued to appear on the New Dealer popup, and in Dealer lists in the **My Lenders** and **System Defaults** pages. Now, all dealer drop-down lists to show only dealers with a status of **Active**.

Example

Billy's Car Place Status is Disabled:

Manage Dealers

Delete Add Dealer

Show 50 State All Status All

Delete	AppOne Lot ID	Org Dealer ID	Dealership	Street	City	State	Zip	Status
<input type="checkbox"/>	9067		Billy's Car Place	111 1st St S	Brooklyn	NY	11211	Disabled
<input type="checkbox"/>	8998	267882	Chippewa RV	384 3rd St	Clara City	MN	56222	Active

In the New Deal popup window, the Location list does not include Billy's Car Place.

portal.appone.net - Select Dealer -- Webpage Dialog

Dealer Information

Search Dealer:

Location: --Select Dealer--

Address 1: --Select Dealer--

City: Chippewa RV - Clara City, MN (#8998)
DO NOT TOUCH CL Hanson FL - Jacksonville, FL (#7771)
DO NOT TOUCH CL Hanson WY - Some City, WY (#7715)

Phone: New Dealer - Waite Park, MN (#9003)
Test New CLH Dealer - Saint Cloud, MN (#8237)

Lender Programs Available

Select Dealer

In the **Admin Console** tab, **My Lenders** page, the **Dealers** list does not include Billy's Car Place.

Dealers:

- Chippewa RV - Clara City, MN (#8998)
- DO NOT TOUCH CL Hanson FL - Jacksonville, FL (#7771)
- DO NOT TOUCH CL Hanson WY - Some City, WY (#7715)
- New Dealer - Waite Park, MN (#9003)
- Test New CLH Dealer - Saint Cloud, MN (#8237)

PBI #246947 - REC/VFI - Funded applications unmarked if marked dead

(Deployed 7/15/2014)

We updated all our lender interfaces (such as CRIF) to address instances of dealers marking approved deals dead. If a dealer marks an approved deal Dead, and a funding notice is subsequently received from the lender, the interface unmarks the deal so that it no longer appears as dead and shows up as a properly funded deal.

PBI #143664 - REC/VFI 2012 - Add Mark Apps Dead & Re-activate Feature

We added **Mark Dead** and **Mark Active** buttons, to the **Lenders** tab giving the user the ability to mark achieve deals dead or dead deals active.

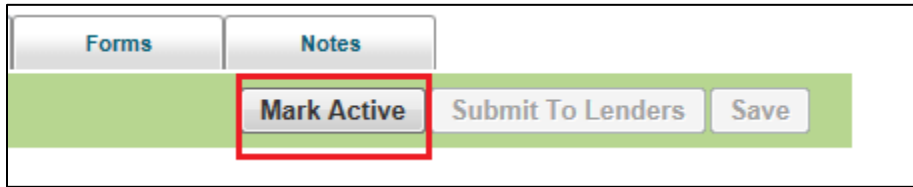
The **Mark Dead** button is available for deals submitted to non-integrated lenders, regardless of the deal status, and for deals submitted to integrated lenders unless the status is **funded=sent to bank** or greater (i.e. the deal has already reached the funding phase). Incomplete deals that are marked dead appear in the **Declined/Dead** tab on the home page.

The screenshot shows a horizontal toolbar with five buttons: "Mark In-Transit", "Mark Dead", "Mark Deal Funded", "Submit To Lenders", and "Save". The "Mark Dead" button is highlighted with a red rectangular box. Above the buttons are three tabs: "Lenders", "Forms", and "Notes".

The **Mark Dead** button opens a **Notes** dialog. The note is mandatory for marking a deal dead.

The screenshot shows a dialog box titled "Mark Deal Dead" with a close button (X) in the top right corner. Below the title bar is a text area labeled "Notes:" containing the word "Because". At the bottom of the dialog is a "Submit" button.

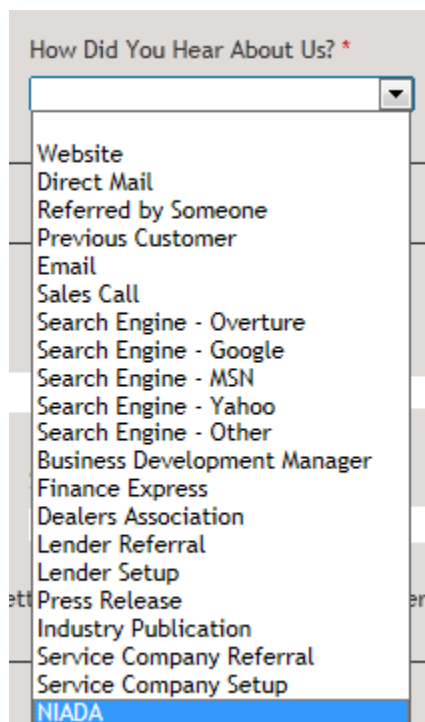
The **Mark Active** button is available on deals that have previously been marked dead. When a deal is marked active, the user can make changes to the deal, print, and perform any other portal function. The **Mark Active** button also opens a **Notes** dialog, but entering a note is optional.



Sprint 3

PBI #249190 - REC - Online Dealer Signup - Dropdown list values now populated with values in the database

We updated Online Dealer Signup page lists **How Did you Hear about us**, **Internet Access**, and **Security Question** to populate with values from the database. Previously, these lists were hard-coded.



Internet Access

None
Dial Up (Phone Line)
Cable Modem
DSL
Fractional T1
T1
Wireless
ISDN
AOL Dialup
AOL Broadband
Satellite (Low)
Satellite (High)

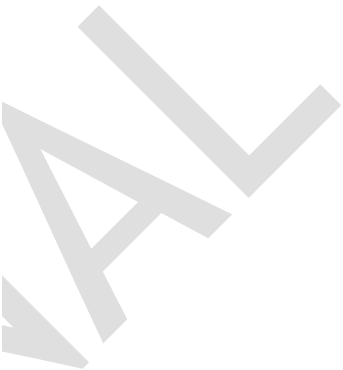
Security Question *

What is your favorite pet's name?
What is your mother's maiden name?
What was your high school mascot?
Which city were you born in?

PBI #254338 - REC - Merrick callback mapping issue

We corrected issues that prevented Merrick’s callback comments and callback down payment information from being saved and from appearing in the callback. The callback comments now appear in the **Notes** field. The down payment information now appears in the **Min Cash Down** field.

Lender:	Merrick - Marine
Transmission Status:	FAILED
Lender AppID:	0
Analyst Name:	Chelsey Rowberry
Analyst Phone:	801-545-6703
Decision:	CONDITIONED 8/11/2014 12:49 PM
Expiration Date:	-
Buy Rate:	9.95%
Max Rate:	9.95%
Max Term:	120 mths
Max Advance:	\$22,350.00
Max Loan Amount:	-
Max Payment:	-
Max VSC:	-
Max GAP:	-
Max Back-End:	-
Min Cash Down:	\$2,400.00
Acq Fee:	-
Trade Equity:	-
Special Stips:	Provide verification of monthly income as stated on application, We need three references with Name and Phone Number
Submit Notes to Lender:	-
Notes:	For verification of pension/ssi, you can provide the following: Recent bank statement showing direct deposit, 2013 1099 &/or recent award letter. Please provide invoice and stipulations prior to contracting. Thanks for the application.. 22 30419 Merrick AppOne.Interface.Senders.Moses.AppOne.Interface.Senders 17558 Pending NotSet 1901-01-01T00:00:00 The wait operation timed out 0 1901-01-01T00:00:00 Pending 2014-08-11T12:51:02.3486262-05:00 1901-01-01T00:00:00 2014-08-11T12:51:02.3486262-05:00 0 0 0 0 1901-01-01T00:00:00 NotApplicable NotApplicable
SELECT CALLBACK:	SELECT/PRINT



PBI #237725 - REC/VFI 2012 - Dealers unable to remove Trade-In #1

We corrected an issue that prevented dealers from removing Trade-In #1 from the Structure page. Now, dealers are able to remove Trade-In #1 by unchecking the box and clicking Save.

Before removing Trade-In #1

Trade-In Information
 Trade-In #1 Information
Year: 1994 Make: YAMAHA Model: 5 SPEED
Serial #: 544F32IU43 Mileage: 0
Lien Holder: US BANK Phone: 423-423-4234 Account #: F423423
 Trade-In #2 Information

After removing Trade-In #1

Trade-In Information
 Trade-In #1 Information
 Trade-In #2 Information

Sprint 4

PBI #237861 - REC 2012 - DocOne Web Demo Trial Function

Internal only

We corrected a condition that allowed VFI dealers to sign up for the demo of DocOne Web. After the update, the only dealers that are able to sign up for the DocOne Web demo are dealers that belong to the DEFAULT organization or an organization labeled as a dealer group.

Dealer belonging to the DEFAULT organization or an organization labeled as a dealer group:

Other Lenders
The selected dealer does not have any lender programs setup.
You do not have access to setup and print documents for your other lenders. To sign up for this option, [click here](#) to download and complete the Subscription Form to enable this access. [Activate Free 30-Day Trial](#)

Dealer belonging to a VFI:

Other Lenders

The selected dealer does not have any lender programs setup.

PBI #200120 - REC/VFI 2012 - Expand availability of "Mark Deal Funded" Button

We added **Mark Deal Funded** and **Un Mark Deal Funded** buttons to the **Lenders** tab for deals submitted to a non-integrated lender.

- The **Mark Deal Funded** and **Mark Deal Unfunded** buttons are not available for integrated lenders.
- The **Mark Deal Funded** button is available on the **Lenders** tab for deals that are complete and submitted to non-integrated lenders. When a deal has a **Funded** status, the **Mark Deal Funded** button is not available.

App ID: 47430 Customer Name: JANE TESTINGHAM

Forms Notes

Mark In-Transit Mark Dead **Mark Deal Funded** Submit To Lenders Save

Lender:	Jenny Bank Co ✓
Transmission Status:	NOT SENT
Lender AppID:	<input type="text"/>

- The **Un Mark Deal Funded** button is available on the **Lenders** tab for deals that are complete, submitted to a non-integrated lender, and have a status of **Funded**.

SUPPORT

App ID: 47927 Customer Name: JERRY RIELAND

Lenders Forms Notes

Un Mark Deal Funded

Lender:	BOA RV Broker ✓
Transmission Status:	COMPLETED
Lender AppID:	0
Analyst Name:	-

Content Items

Sprint 2

PBI #248736 - SR 1362654 - Epic Request - SC boat title application- new form
(Deployed 7/15/2014)

Per a request from Epic, we added *Watercraft/Outboard Motor Application (SC)* as a new form to AppOne content.

PBI #247469 - SR 1360778 - CW Request - NC MVR 181 - two added versions
(Deployed 7/15/2014)

Per a request from CW, we added two additional versions of the form *Damage Disclosure Statement MVR-181 (Rev 12/2011)*. When invoked, the first version populates with information from Trade-In #1, and the second version populates with information from Trade-In #2.

PBI #247468 - SR 1360778 - CW Request - NC MVR 180 - two added versions
(Deployed 7/15/2014)

Per a request from CW, we added two additional versions of the form *Odometer Disclosure Statement MVR180 (Rev. 5/89)*. When invoked, the first version populates with information from Trade-In #1, and the second version populates with information from Trade-In #2.

PBI #247467 - SR 1360778 - CW Request - NC MVR 63 - two versions
(Deployed 7/15/2014)

Per a request from CW, we added two new forms as versions of *Power of Attorney MVR63 (Rev. 1/06) (Trade #1)* and *Power of Attorney MVR63 (Rev. 1/06) (Trade #2)*. When invoked, the first version populates with information from Trade-In #1, and the second version populates with information from Trade-In #2.

PBI #247466 - SR 1360778 - CW Request - NC MVR 2 - one version
(Deployed 7/15/2014)

Per a request from CW, we added *Dealers Reassignment of Title MVR2 (Rev. 9/08)* as a new form to AppOne content.

PBI #252856 - BSI 2014.2 - New Revision of Goods and Services Retail Installment Contract with Arbitration (SC) RSSIGSLFAZ-SC
(Deployed 7/29/2014)

We revised *Goods and Services Retail Installment Contract with Arbitration RSSIMVLFAZ-SC (Rev 7/01/2014)* and added it as a new form to AppOne content. .

PBI #256404 - Updating DB status of Outdated Forms

(Deployed 9/9/2014)

We disabled a number of outdated contracts within AppOne. These forms were marked inactive in the AppOne database, and the text “WARNING - OUTDATED CONTRACT” was added to the description.

The following forms were disabled:

- All states and versions of the *Goods and Services Retail Installment Contract with Late Fee (RSSIGSLFLZ)* prior to those updated in the 2014.1 release. All state versions of this contract were updated in the 2014.1 release, and the latest versions all have a revision date of 12/30/2013 or later.
- 12 custom contracts that TMFS indicates are no longer active. All are identified as “carbon copy” contracts.
- The previous MeriTrust contract, *MeriTrust Retail Installment Contract*. The current version is *MeriTrust Retail Installment Contract Rev 02/13/2013 (with origination fee)*.
- A custom contract, *Boulevard Bank Retail Installment Contract (Arkansas)*, that Boulevard indicates is no longer active,

PBI #258084 - RMS Request - Reminder form for Co-X Initials

(Deployed 8/24/2014)

Per a request from RMS, we added *REMEMBER BOTH CUSTOMERS NEED TO INITIAL CONTRACT* to AppOne content as a new form. The form appears in the funding packet when there are two applicants on a deal.

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