



# AppOne

## 2014.2 AppOne Management System (AMS) EXTERNAL Release Notes

June 2014

#### **Publication Information / Version**

Full Product Name: AppOne  
Document Title: AppOne Management System (AMS) EXTERNAL  
Software Version Information: 2014.2  
Document Version Information: 1.0  
Release Date: June 2014

#### **Distributed Subject to Terms of a License or other Agreement**

The contents of this publication, including its appendices, exhibits, and other attachments, as updated or revised, are highly confidential and proprietary to Wolters Kluwer Financial Services, Inc. or its subsidiaries or affiliates (“Wolters Kluwer Financial Services”). This publication is distributed pursuant to a Non-Disclosure Agreement, Evaluation Agreement, License Agreement and/or other similar agreement(s) with Wolters Kluwer Financial Services, Inc. or its subsidiary or affiliate. Unless otherwise specifically provided in such agreement(s), the reproduction of this publication is strictly prohibited. Use and distribution of this publication are also subject to the responsibilities and obligations of such agreement(s), which require confidential treatment of this publication and its contents.

Information in this guide is subject to change without notice and does not represent a commitment on the part of Wolters Kluwer Financial Services.

#### **Do Not Reproduce or Transmit**

Unless otherwise specifically authorized in the agreement or license under which this publication has been provided, no part of this publication may be posted, played, transmitted, distributed, copied or reproduced in any form or by any means, electronic or mechanical, including photocopying, recording, or retaining on any information storage and retrieval system, without prior written permission from Wolters Kluwer Financial Services.

Requests for permission to reproduce content should be directed to Wolters Kluwer Financial Services, Inc., Corporate Legal Department, by telephone at 1-800-397-2341.

#### **Not a Substitute for Legal Advice**

This publication is intended to provide accurate and authoritative information about the subject matter covered based upon information available at the time of publication. Examples given in this publication are for illustrative purposes only.

Development of this publication and the software (including forms, disclosures, reports, and other documents generated by the software) or other products that it describes was based on Wolters Kluwer Financial Services' understanding of various laws, regulations and commentaries. Wolters Kluwer Financial Services cannot and does not guarantee that its understanding is correct.

This publication is not intended, and should not be used, as a substitute for legal, accounting, or other professional advice. Wolters Kluwer Financial Services is not engaged in providing legal, accounting or other professional services. If legal or other professional assistance is required, you should seek the services of a competent professional. We encourage you to seek the advice of your own attorney concerning all legal issues involving the use of this publication and any products described in this publication. If your interpretations or your counsel's interpretations are contrary to those expressed in this publication, you should of course, follow your/your counsel's interpretations.

The following notice is required by law:

**WOLTERS KLUWER FINANCIAL SERVICES' PRODUCTS AND SERVICES ARE NOT A SUBSTITUTE FOR THE ADVICE OF AN ATTORNEY.**

#### **Warranty Disclaimer**

Except only for the warranties (if any) expressly set forth in the agreement(s) under which this publication is provided (i.e., your agreement or license for the described product), this publication is provided “as is”, and Wolters Kluwer Financial Services makes no warranty, express, implied, by description, by sample or otherwise, and in particular and without limitation, makes no implied warranties of merchantability or fitness for purpose. No modifications to this Warranty Disclaimer are authorized unless in writing and signed by the President or a Vice President of the Wolters Kluwer Financial Services entity licensing the product described in this publication.

#### **Attributions and Acknowledgements**

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

AppOne® and DocOne® are the registered trademarks of Wolters Kluwer Financial Services, Inc. All other trademarks are the property of their respective owners.

#### **Copyright Information**

© 2014 Wolters Kluwer Financial Services, St. Cloud, Minnesota

This publication is the confidential information of Wolters Kluwer Financial Services. Distribution of this publication is subject to restrictions in the license or agreement under which this publication is provided to authorized Wolters Kluwer Financial Institution customers.

All rights reserved.

# Table of Contents

Merrick Bank - VA address change .....	1
CL/CD - FL Update.....	1
Update PPP .....	2
Merrick Bank Address Change.....	2
VFI - Change Postal Credit Union to Ideal Credit Union for SourceOne .....	3
CRIF ACtion Interface .....	3

AMS EXTERNAL

AMS EXTERNAL

### Merrick Bank - VA address change

TMFS requested that we update the lien address for Merrick Bank in Virginia.

Lender Addresses									
Type	Code	Name	Address1	Address2	City	State	Zip	Phone	Fax
Contract	TMFS_	Tracker Marine Financia	2500 E. Kearney		Springfiel	MO	65810	800-562-6463	417-863-1019
Lien	MEB15	Merrick Bank	PO Box 1500		Draper	UT	84020	225-408-1000	888-958-8068

LIEN/MAIL TO	FIRST LIEN	SECURITY AGREEMENT DATE	MAIL TO LIENHOLDER	
	<input checked="" type="checkbox"/> YES <input type="checkbox"/> NO	4/22/2014	(B) <input checked="" type="checkbox"/>	
	1 FIRST LIEN	Merrick Bank		
	STREET ADDRESS, R.R. OR P.O. BOX NUMBER			
	PO Box 1500			
CITY		STATE	ZIP CODE	
Draper		UT	84020	

### CL/CD - FL Update

TMFS requested that we update their Credit Life and Credit Disability rates & forms for the state of Florida.

AMS EXTERNAL

## Update PPP

Tracker Marine asked us to enable Premier Protection Plans for their dealers in California.

### MenuOne® Real-Time Price Quotes

[Save & Update](#)

**IMPORTANT DISCLAIMERS:**

- Any change in VSC and GAP pricing will automatically affect the credit life and credit disability premiums.

**Vehicle Service Contract**

★ Integrated Providers

<b>Select</b>	<input checked="" type="radio"/> Integrated	<input type="radio"/> Non-Integrated
<b>Company</b>	Premier Protection Plans	-
<b>Program</b>	Premier Pro - Outboard	-
<b>Plan</b>	2 Stroke - 36 Months	-
<b>Plan Item</b>	0-24 HP	-
<b>Coverage</b>	36 months	-
<b>Deductible</b>	\$100 Deductible	-
<b>Surcharges</b>		-
<b>Description</b>	Premier Protection Plans - Outboard 2 Stroke - 36 Months 0-24 HP	
<b>Dealer Cost</b>	\$80.58	-
<b>Retail</b>	<input type="text" value="\$375.00"/> <input checked="" type="checkbox"/> Tax <input type="checkbox"/> Dealer Sold	-
	<input type="text" value="5.000 %"/> <input type="text" value="\$18.75"/> <input type="checkbox"/> Override	-

## Merrick Bank Address Change

We updated Merrick Bank lienholder address information for Tracker Marine only to the following:

Merrick Bank  
PO BOX 1500  
Draper UT 84020

The updated lienholder address now prints on all forms.

3. SECURED PARTY'S NAME: (or NAME of ASSIGNEE of ASSIGNOR SECURED PARTY): Provide only one Secured Party name (3a or 3b)				
3a. ORGANIZATION'S NAME				
MERRICK BANK				
OR				
3b. INDIVIDUAL'S SURNAME		FIRST PERSONAL NAME	ADDITIONAL NAME(S)/INITIAL(S)	SUFFIX
3c. MAILING ADDRESS				
PO BOX 1500		CITY DRAPER	STATE UT	POSTAL CODE 84020
COUNTRY USA				
4. COLLATERAL: This financing statement covers the following collateral:				
2003	MAKE	MODEL	12345678901234567	

## VFI - Change Postal Credit Union to Ideal Credit Union for SourceOne

We updated the name of a SourceOne lender from “Postal Credit Union” to “Ideal Credit Union.” The name has been updated for the Bankname, lienholder and insurance addresses

<b>Ideal Credit Union</b>
651-747-1849
-
<input type="checkbox"/>
Create Manual Callback

### Loss Payee (Name and Address)

**Ideal Credit Union**  
8499 Tamarack Road  
Woodbury, MN 55125

## CRIF Action Interface

We created a new interface for lenders on the CRIF Action Loan Origination Solution (LOS). This new interface will allow the transmission of credit application data including borrower, collateral & structure information from AppOne → CRIF. Conversely credit decision data including loan status and terms will be exported from CRIF → AppOne. The first lender that will be launching with this new interface will be Medallion Bank. Medallion Bank is currently a lender on the AppOne Platform that receives applications via fax from dealers & Virtual F&I organizations. As a result, these users today have manual callback population enabled that will allow them to manually input the fax callback into AppOne before printing docs. With the launch of this interface, this option will be turned off for all dealers and VFI organizations as this data will now electronically come back via the interface and Medallion Bank does not want to allow its dealers the ability to change their callback manually. Medallion Bank also plans on sending a fax callback in parallel to the dealer for a while until dealers get used to the electronic interface. Finally, we have modified the program setup for Medallion as follows:

- **Medallion - Marine Program** - to be only used for Marine deals.
- **Medallion - RV Program** - to be only used for RV deals.
- **Medallion - MotorCycle Program** - to be only used for MotorCycle deals.
- **Medallion - Trailer Program** - to be only used for Trailer/HorseTrailer deals.

Current - Callback Population Enabled

Lender:	Medallion – Motorcycle
Transmission Status:	COMPLETED
Lender AppID:	169145
Analyst Name:	Temporary7 Employee
Analyst Phone:	801-284-7065 Ext: <input type="text"/>
Decision:	Approved <input type="button" value="v"/> <a href="#">PRINT CALLBACK</a>
Expiration Date:	<input type="text"/>
Buy Rate:	6.29%
Max Rate:	6.29%
Max Term:	60
Max Advance:	\$0.00
Max Loan Amount:	\$21,460.04
Max Payment:	\$418.88
Max VSC:	\$0.00
Max GAP:	\$0.00
Max Back-End:	\$0.00
Min Cash Down:	\$1,500.00
Acq Fee:	\$0.00
Trade Equity:	\$0.00
Special Stips:	
Submit Notes to Lender:	-
Notes:	Approved amount reflects required 10% down <input type="button" value="v"/>
SELECT CALLBACK:	<input type="button" value="SELECT/PRINT"/>

URNAL

AM

New - Callback Population Disabled

Lender:	<b>Medallion – Motorcycle</b>
Transmission Status:	<b>COMPLETED</b>
Lender AppID:	169145
Analyst Name:	Temporary7 Employee
Analyst Phone:	801-284-7065
Decision:	<b>APPROVED</b> 6/9/2014 2:02 PM
Expiration Date:	-
Buy Rate:	6.29%
Max Rate:	6.29%
Max Term:	60 mths
Max Advance:	-
Max Loan Amount:	\$21,460.04
Max Payment:	\$418.88
Max VSC:	-
Max GAP:	-
Max Back-End:	-
Min Cash Down:	\$1,500.00
Acq Fee:	-
Trade Equity:	-
Special Stips:	
Submit Notes to Lender:	-
Notes:	Approved amount reflects required 10% down payment.. Proof of income verified.. See file notes or exception sheet.. Good pay history with us, . PLEASE REFER TO THE MEDALLION BANK FAX NOTIFICATION FOR THE MOST RECENT LOAN APPROVAL TERMS AND CONDITIONS.
SELECT CALLBACK:	<input type="button" value="SELECT/PRINT"/>

CRINAL

AMM

**About Wolters Kluwer Financial Services** - Whether complying with regulatory requirements or managing financial transactions, addressing a single key risk, or working toward a holistic enterprise risk management strategy, Wolters Kluwer Financial Services works with more than 15,000 customers worldwide to help them successfully navigate regulatory complexity, optimize risk and financial performance, and manage data to support critical decisions. Wolters Kluwer Financial Services provides risk management, compliance, finance and audit solutions that help financial organizations improve efficiency and effectiveness across their enterprise. With more than 30 offices in 20 countries, the company's prominent brands include: AppOne®, ARC Logics®, AuthenticWeb™, Bankers Systems, Capital Changes, CASH Suite™, FRSGlobal, FinArch, GainsKeeper®, NILS®, TeamMate®, Uniform Forms™, and VMP® Mortgage Solutions. Wolters Kluwer Financial Services is part of Wolters Kluwer, a leading global information services and solutions provider with annual revenues of (2014) €3.6 billion (\$4.9 billion) and approximately 19,000 employees worldwide. Please visit our website for more information.

**Wolters Kluwer Financial Services**  
6815 Saukview Drive  
St. Cloud, MN 56303  
Toll-free: 800.274.2711

To learn more visit **WoltersKluwerFS.com**.

© 2014 Wolters Kluwer Financial Services, Inc. All Rights Reserved.