

AppOne®

Platform Quick-Start Training Guide

April 2015

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Table of Contents

Get Started	1
Objectives	1
Log on to AppOne®	1
Home: Dealership Dashboard	3
Set Up Lenders, Systems Defaults, and Forms	5
Objectives	5
Administration Checklist	5
Set Up System Defaults	5
Set Up Lenders	6
Set Up Form Batches	9
Make a Blank Credit Application Available Online	12
Enable CREDCO (Credit Reports) and DMS Interfaces	13
Create a Financed Deal	15
Objectives	15
Deal Workflow	16
Complete Applicant Information	17
Pull a New Credit Report	19
Enter Collateral Information	20
Enter Trade-in/Deal Structure Information	23
Select Lenders and Submit the Deal	26
Receive a Deal Status and Select Lender for Callback	27
Complete and Print the Risk-Based Pricing Notice	30
Complete the Deal Structure	31
Verify Lender Information/Print Forms	33
Create a BHPH Deal	34
Create a Cash Deal	37
Objectives	37
Deal Workflow	37
Complete Applicant Information	38
Enter Collateral Information	39
Enter Trade-in/Structure Information	42
Print Forms	43
Additional Tasks	44
Objectives	44
Access Deals on the Home Page	44
View AppOne Announcements	45
Access Active Customers to Print the Adverse Action	45
Sign-up for CREDCO	46

Complete an Application Quick Search.....	46
Add a Note to an Application	47
Work with Scanned Documents	47
Edit Dealer Information	49
Add a User.....	50
Delete a User	50
Add Email Alerts.....	51
Frequently Asked Questions	52
Questions	52
What is the difference between a RouteOne lender and a fax lender?	52
Is AppOne a lender?.....	52
How do I re-submit a declined deal?	52
How do I check the status of a deal I have already submitted?	53
How do I locate a deal that I do not see on my screen?	54
How do I unlock an account or reset a password?.....	55
How do I make the APR match the rate disclosed to the customer?.....	56
AppOne Contacts	57

Get Started

Objectives

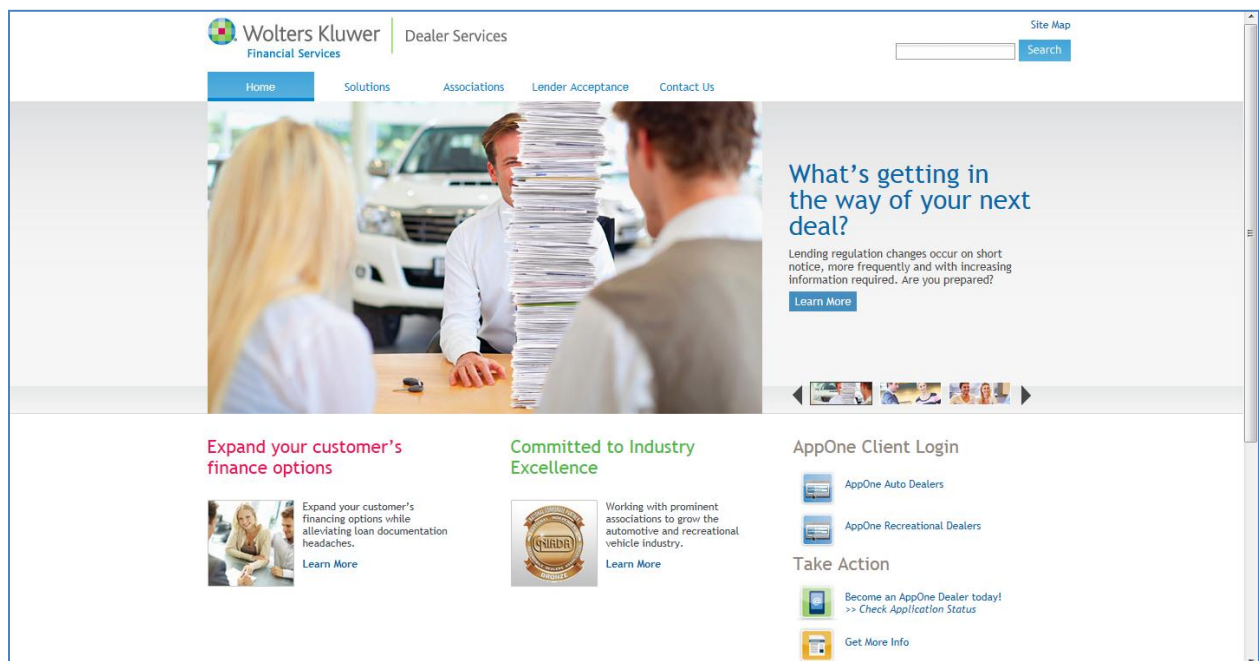
- Log on to AppOne.
- Learn about the Dealership Dashboard.

Log on to AppOne®

Note

See the AppOne login page for problems logging in or with any other questions.

1. Navigate to <http://www.AppOne.net>.
 - The Internet Explorer®, Firefox® and Chrome™ browsers are fully supported by AppOne.
 - You might want to add the login page to your **Favorites** folder (in Internet Explorer) or bookmark it (in Firefox). In Internet Explorer, right-click on the page and select **Add to favorites** from the menu.



2. Click on the **AppOne Recreational Dealers** button to log in.



AppOne Recreational Dealers

3. In the **Dealer Login** area, enter your username and password. Click the **Sign In** button.

Note:

The gray bar at the bottom of the page includes useful links. Click the **Make Home Page** link to make the AppOne Login page the home page for your browser. Click the **System Requirements** link to see the hardware and software required for using AppOne.

4. The first time you log in, you will be asked to change your password.

- Enter your username and temporary password.
- Enter a new password (8 characters, 1 upper case letter, and 1 number).
- Enter a unique email address.
- Select a security question and provide an answer.
- On the next page, accept the terms of use.

Notes

Passwords must be at least 8 characters with at least 1 capital letter, at least 1 lower case letter and at least 1 number.

Forgot your password? - Click the Forgot your password? link and follow the instructions on the web page for resetting your password. You can also call 1-877-404-6788 for additional assistance.

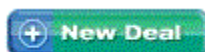
Home: Dealership Dashboard



Menu Bar

- **Home:** Provides lists of active deals, contracts in transit, declined/dead deals, and funded deals.
- **Credit Reports:** Allows you to pull credit reports for active and new customers, and sign up for a CREDCO account.
- **Lenders:** Provides important information about available lenders and access to AppOne preferred product providers.
- **Admin Console:** Allows users with administrative rights to set up default information for lenders, form batches, system defaults, and alerts. The Admin Console provides a way to make a credit application available online for a customer.
- **Support:** Access to frequently asked questions, training videos, and contact information.

Buttons



New Deal: Click to begin a new application. This button does not appear on all pages.



Refresh: Click to refresh data. This button does not appear on all pages.



Training Videos: Click to view links to online training videos.

Set Up Lenders, Systems Defaults, and Forms

Objectives

- Set up system defaults.
- Set up lenders.
- Set up form batches.
- Make a blank credit application available online.
- Enable CREDCO and DMS Interfaces

Tip

Remember to complete your setup before entering deal information.

Administration Checklist

Before beginning deals in AppOne®, enter default information in the Admin Console section.

- Set up system defaults, which include taxes and reoccurring fees such as license fees.
- Set up lender information.
- Set up form batches.
- Make a blank credit application available online (optional).
- Enable CREDCO and DMS interfaces
- Set up users (see [Add a User](#) and [Delete a User](#))

Note

Only users with administrative rights can add/change information in the Admin Console.

Set Up System Defaults

System Defaults allow you to set up default fees and taxes. The tax, title, and license information will automatically be calculated for your applications. **System Defaults** also allows you to set up defaults for back-end products.

1. Select **Admin Console** on the Menu bar.
2. Select tax and fee defaults **System Defaults**.

3. Complete tax and fee information.

HOME | CREDIT REPORTS | LENDERS | ADMIN CONSOLE | SUPPORT | FIND APP | Enter AppID OR Last Name | GO

My Lenders | My Form Batches | **System Defaults** | Dealership Info | Manage Users | My Info | My Alerts | Online Credit App

System Defaults

Taxes

State Sales Tax Rate: 5.30000 % City Sales Tax Rate: 2.00000 % County Sales Tax Rate: 1.00000 %

Fees

Code	Name	Rate	Amount	Taxable	Modified
doc	Documentation Fee	-	20.00	<input type="checkbox"/>	10/4/2013 11:34 AM
inspection	Inspection Fee	-	300.00	<input type="checkbox"/>	10/4/2013 11:34 AM
license	License Fee	-	90.00	<input type="checkbox"/>	10/4/2013 11:34 AM
notary	Notary Fee	-	15.00	<input type="checkbox"/>	10/4/2013 11:34 AM
registration	Registration Fee	-	10.00	<input type="checkbox"/>	10/4/2013 11:34 AM
title	Title Fee	-	5.00	<input type="checkbox"/>	10/4/2013 11:34 AM
ucc	UCC Filing Fee	-	10.00	<input type="checkbox"/>	10/4/2013 11:34 AM

4. Complete back-end product information.

Back End Products

Product Name	Product Type	Company Name	Dealer Cost	Retail Selling Price	Tax Rate	Coverage Term	Deductible	Coverage Description	Modified
Credit Disability	-	CD Test	500.00	800.00	7.500%	160	200.00	CD Desc	10/4/2013 8:49 AM
Credit Life	-	CL Test	300.00	575.00	8.500%	150	150.00	CL Desc	10/4/2013 8:49 AM
GAP	-		0.00	0.00	0.000%	0	0.00		10/4/2013 11:34 AM
Paint Protection	-	PP Test	500.00	1,300.00	5.000%	130	150.00	PP Desc	10/4/2013 8:49 AM
Pre-Paid Maintenance	-	PPM Test	800.00	1,600.00	8.000%	120	300.00	PPM Desc2	10/4/2013 8:49 AM
Roadside Assistance	-	RA Test	400.00	1,200.00	4.000%	110	100.00	RA Desc	10/4/2013 8:49 AM
Theft Protection	-	TP Test	600.00	1,400.00	6.000%	100	200.00	TP Desc2	10/4/2013 8:49 AM
Tire & Wheel Protection	-	TWP Test2	700.00	1,500.00	7.000%	90	250.00	TWP Desc	10/4/2013 8:49 AM
Vehicle Service Contract	-	VSC Test2	1,200.00	2,000.00	12.000%	80	500.00	VSC Desc	10/4/2013 8:49 AM

[update](#)

5. Click the **Update** button when complete.

Notes

Only users with administrative rights can change system default information.

The displayed fees are specific to your state and the type of collateral.

Set Up Lenders

1. Select **Admin Console** on the Menu bar.
2. Click the **My Lenders** link.
3. Use the Collateral Type drop-down at the top of the page to filter lenders by collateral type.

- Review the AppOne Lenders section. This section lists all integrated lender programs that are available to you in your region.

AppOne Lenders

Collateral Type: Marine

Save

Enable	Lender Name	Program Name	Description	LenderDealerID	LienHolder Address	Insurance Address	Links	Modified
<input type="checkbox"/>	Ally	ALLY RV Program	Use this program to submit apps and print docs for RV collateral for Ally. PLEASE NOTE: the DealerID you enter for this program must be a minimum of 10 characters. If the DealerID given to you is not 10 characters in length, please add leading zeros to make it 10 characters. e.g. 0000012345.		P.O. Box 8104 Cockeysville, MD, 21030	PO Box 8143 Cockeysville, MD, 21030	Links	--
<input checked="" type="checkbox"/>	American Credit Acceptance Corp. - R1	American Credit Acceptance	--	12345	P.O. Box 1899 Spartanburg, SC, 29304	P.O. Box 3487 Coppell, TX, 75019	Links	test7737 3/19/2014 12:27 PM
<input checked="" type="checkbox"/>	Bank of America, N.A.	BOA Direct-to-Consumer (Approval Letter) Marine	--		PO Box 2759 Jacksonville, FL, 32203-2759	--	Links	test7737 4/2/2014 1:56 PM
<input type="checkbox"/>	Bank of America, N.A.	BOA Marine Broker	--		PO Box 2759 Jacksonville, FL, 32203-2759	PO Box 2759 Jacksonville, FL, 32203-2759	Links	--
<input checked="" type="checkbox"/>	Bank of America, N.A.	BOA Marine Consignment	--		PO Box 2759 Jacksonville, FL, 32203-2759	PO Box 2759 Jacksonville, FL, 32203-2759	Links	param 9/27/2010 5:59 PM
<input checked="" type="checkbox"/>	M&T Bank	M&T Bank	--	05658	P.O. Box 37258 Baltimore, MD, 21297	PO Box 5000 Springfield, OH, 45501-5000	Links	kmtestrecia 3/26/2014 11:40 PM

- Select the check box in the **Enable** column to enable a lender for your dealership.
- Enter the dealership's lender ID number in the **LenderDealerID** column. If the **LenderDealerID** is missing, deals submitted electronically will not reach the lender.
- Click **Links** in the Links column to access links to helpful lender information.

- Review non-integrated lenders in the **Other Lenders** section.

Other Lenders

Add Other Lender

Enable	Lender Name	LenderDealerID	LienHolder Address	Insurance Address	Modified
<input checked="" type="checkbox"/>	APPONE Test Bank	12345	850 Driftwood Dr, 300 Schenectady, NY, 12345	850 Driftwood Dr, 300 Schenectady, NY, 12345	test7737 4/2/2014 10:51 AM
<input checked="" type="checkbox"/>	Aqua		123 a0000 road Baton Rouge, LA, 70809	123 a road Baton Rouge, LA, 70809	dnacqui 2/11/2014 2:49 PM
<input checked="" type="checkbox"/>	Aqua Finance		John st, 300 Saint Cloud, MN, 56303	John st, 300 Saint Cloud, MN, 56303	test7737 2/10/2014 6:29 AM
<input checked="" type="checkbox"/>	Bank APPONE		Driftwood Dr, 200 Saint Cloud, MN, 56303	Driftwood Dr, 200 Saint Cloud, MN, 56303	test7737 2/12/2014 12:52 PM
<input checked="" type="checkbox"/>	Bank of America, N.A.		P.O. Jacksonville, FL, 32203-2759	PO Box 111 Jacksonville, FL, 32203-2759	param 9/27/2010 5:59 PM
<input checked="" type="checkbox"/>	Bank of Luxembourg		1111 Brooklyn, NY, 11211	1111 Brooklyn, NY, 11211	kmtestrecia 1/31/2014 10:05 AM
<input checked="" type="checkbox"/>	Bank of the West		111 1st St S, Ste 101A Brooklyn, NY, 11211	111 1st St S, Ste 101A Brooklyn, NY, 11211	kmtestrecia 2/20/2014 10:15 AM
<input checked="" type="checkbox"/>	Bank of the West		111 1st St S, Ste 101A Brooklyn, NY, 11211	111 1st St S, Ste 101A Brooklyn, NY, 11211	kmtestrecia 2/20/2014 10:12 AM
<input checked="" type="checkbox"/>	Bank of the West		1111 1st St S Brooklyn, NY, 11211	1111 1st St S Brooklyn, NY, 11211	kmtestrecia 2/20/2014 10:12 AM
<input checked="" type="checkbox"/>	Bank of the West		PO San Ramon, CA, 94583	P.O. Box 513 Amelia, OH, 45102	dnacqui 2/11/2014 12:51 PM
<input checked="" type="checkbox"/>	Banterra Bank		123 Main Street Baton Rouge, LA, 70809	123 Main Street Baton Rouge, LA, 70809	foleman 3/3/2014 2:11 PM

- If you have subscribed to AppOne for Dealers, you can add and edit lenders in this section.

- If you have not subscribed, you can activate a trial subscription that will allow your dealership to fax applications and print documents for lenders that are not integrated on the AppOne Portal. To activate the trial subscription, click the **Activate Free 30-Day Trial** button. To permanently purchase a subscription, click the **click here** link.

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**

- Use the **Other Lenders** section to add your business as a lienholder for BHPH deals.

Note

If you do not have the ability to add other lenders, contact Supportline or your Business Development Manager. See [AppOne Contacts](#) at the end of this document for contact information.

- To edit lenders in the **Other Lenders** section, click on the link in the Lender Name column.
- To add a lender, click the **Add Other Lender** button.
 - Select a lender or the **Add New Lender Manually** option in the **Lender** drop-down list.
 - Complete the information.
 - Information will automatically display for some lenders.
 - The State Lien Holder Code is the code for submitting applications electronically.
 - In the **Additional Information** section, set the **Contract Accrual Disclosure** and the **Calculation Method**. Contact the lender to find out the accrual method they prefer.
 - If the Insurance (Loss Payee) Information is the same as the Lien Holder Information, select the **Same as above** check box.
 - Lenders listed under 'Other Lenders' have applications submitted by fax instead of electronically.

- Click the **Save** button. Wait until the lender displays in the list before proceeding.

Add New Lender

Lender Information

Lender Name:

Credit App Fax #:

LienHolder Information

Name:

State Lien Holder Code:

Phone:

Address1: Address2:

Zip / City / State:

Insurance (Loss Payee) Information Same as above ☐

Name:

Address1: Address2:

Zip / City / State:

Additional Information

Contract Accrual Disclosure:

Calculation Method:

Lender Set Up for Buy Here Pay Here (BHPH) Deals

To set up your business as a lender for BHPH deals, click the **Add Other Lender** button, and complete your lender and lienholder information in the **Add New Lender** dialog.

Set Up Form Batches

If applicable, set up a forms list.

Note:

You need to have an AppOne subscription to set up form batches. You can still use form batches set up with earlier versions of AppOne, but you will not be able to set up new form batches.

1. Select **Admin Console** on the menu bar.

2. Select My Form Batches.

HOME CREDIT REPORTS LENDERS ADMIN CONSOLE SUPPORT			
My Lenders My Form Batches System Defaults Dealership Info Manage Users My Info My Alerts Online Credit App			
Forms			
<div>Add New BatchDelete Selected Batches</div>			
Delete	ID	Batch Name	Applies To
<input type="checkbox"/>	6913	APPONE forms	Finance
<input type="checkbox"/>	110	dustin test	-
<input type="checkbox"/>	6590	New collateral	-
<input type="checkbox"/>	6628	test	Finance
<input type="checkbox"/>	114	test	-
<input type="checkbox"/>	6725	Test (symbol)/ 2	-
<input type="checkbox"/>	6894	test delete	-

3. Click the **Add New Batch** button.
4. Complete the Form Batch information.
5. Select the **State**, **Form Type**, and **Filter**.
6. Add forms by selecting a form and clicking the **Add** button.
 - Add consecutive multiple forms by selecting the first form, pressing the SHIFT key, and selecting the last form. Click the **Add** button.
 - Add separate multiple forms by selecting the first form, pressing the CTRL key, and selecting each form. Click the **Add** button.
 - Generic documents begin with "Bankers Systems."
7. Repeat step 6 until all forms are added.
8. Click the **Save** button.

Form Batch:

Name: Description: Applies to:

List of Forms:

State: Form Type: Filter:

Available Forms
(Please select the state and form type to see the available forms.)

- A+ Plus FCU ACH Form
- A+ Plus FCU Agreement to Provide Insurance
- A+ Plus FCU Membership Application
- A+ Plus FCU Retail Installment Contract Addendum

Forms Selected

Add >> Remove <<

Save Cancel

A standard deal jacket/funding package should consist of the following information:

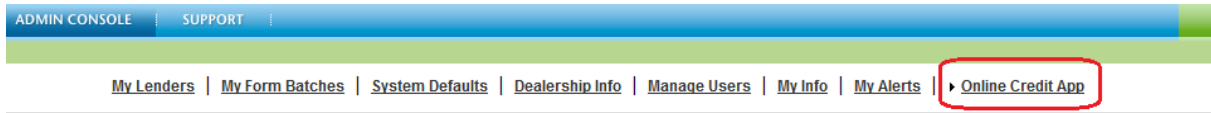
- Buyer's Order (make sure you add the state specific Buyer's Order in needed)
- Retail Installment Contract (most lenders accept either the Late Fee version or the Late Fee with arbitration version, contact your lender directly to verify which plain paper/E-form contract that they accept)
- Credit Application
- Agreement to Provide Insurance
- Notice to Co-signer
- Documentation to transfer title
 - Title application (MV1)
 - Odometer Statement
 - Lien information
- Buyer's Guide
- Bookout Sheet (in the AppOne documents)
- Reference Sheet (in the AppOne documents)

BHPH Form Batch Setup

You can set up a form batch for BHPH deals or select a generic form (such as Bankers Systems Motor Vehicles Form) when you are ready print.

Make a Blank Credit Application Available Online

1. Select **Admin Console** on the menu bar.
2. Select the **Online Credit App** link.



3. Enter the Online Credit App information:
 - Select the **Enable the Online Credit App** feature check box.
 - Enter a unique name for the Website folder.
 - Enter one or more email addresses for notification. Addresses must be separated by a semicolon.
 - Select a Website Theme.
 - Enter text for the Credit App Submission Disclaimer.
4. Press the **Save** button.

A screenshot of the 'Online Credit App' configuration page. The page has a title 'Online Credit App' in red. Below the title is a green horizontal line. The main content area contains a checkbox labeled 'Enable the Online Credit App feature for my dealership' which is checked. Below this are several input fields: 'Unique Website Folder Name' with the value 'test7358' and a hint 'e.g. abcmotors, jakesrvworld etc.' and a URL 'http://external.test.appone.net/OnlineCreditApp/test7'; 'Notification Email Addresses' with the value 'abhee15@gmail.com' and a hint 'Enter one or more email addresses sep'; 'Website Theme' with a dropdown menu showing '5' and a 'Preview' link. Below these is a large text area for 'Credit App Submission Disclaimer Text' containing the text: 'I am interested in purchasing or leasing a vehicle from DO NOT TOUCH RMS Auto Sales LA and hereby authorize DO NOT TOUCH RMS Auto Sales LA 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.' At the bottom right is a 'Save' button.

5. Copy the hyperlink and have it embedded on your dealership website. Customers will be able to click on this link and fill out the credit application. You may need to forward the link to your web designers so that they can embed it in the appropriate tab and button on your website.

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abcmotors, jakesrvworld etc. <http://external.test.appone.net/OnlineCreditApp/test7358>

Enter one or more email addresses separated by semi-colons where you want to send the credit application.

urchasing or leasing a vehicle from DO NOT TOUCH
d hereby authorize DO NOT TOUCH RMS Auto Sales LA
mer Credit Report and submit my credit application
iated lenders, at no cost to me, in order to help
and extent of financing which may be available to

Note

You must be an administrative user to use this feature. If a non-administrative user clicks the Online Credit App link, an error message is displayed.

Enable CREDCO (Credit Reports) and DMS Interfaces

1. Select Admin Console on the menu bar.
2. Select the 3rd Party Interfaces link.



3. To enable CREDCO:

- Check the Enable CREDCO box.
- Fill in the CREDCO Customer ID and CREDCO Password in the Value column,

Enable CREDCO	
Parameter	Value
CREDCO Customer ID	<input type="text" value="4006920"/>
CREDCO Password	<input type="text" value="9QGS4J0Z"/>

4. To enable a DMS interface:

- Check the box corresponding to the interface name.

- Fill in the **System DealerID**.

Enable 3rd Party DMS/System Interface			
Enable/Disable	System Name	Description	System DealerID
<input checked="" type="checkbox"/>	IDS Astra DMS	-	12345
<input type="checkbox"/>	Supreme Software	-	

5. Click the **Save** button.

Create a Financed Deal

A financed deal is any deal that has lienholder, integrated or non-integrated. A BHPH deal, where you, the dealer, act as the lienholder, is also a financed deal. To create a cash deal, see [Create a Cash Deal](#).

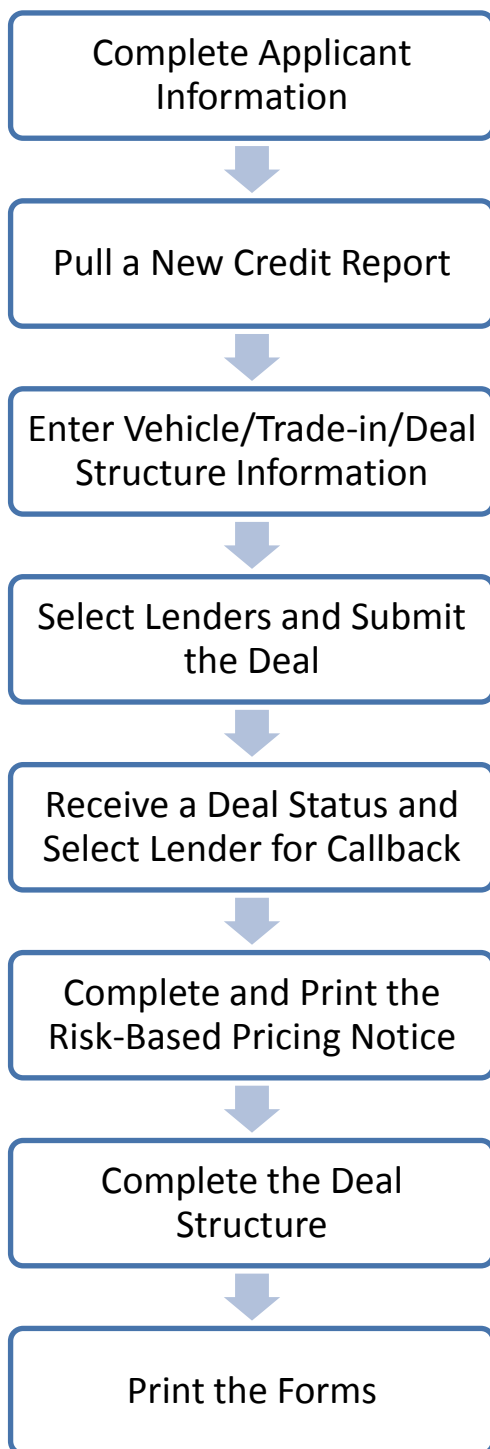
Objectives

- Review the deal workflow.
- Complete applicant information.
- Pull a new credit report.
- Enter collateral information
- Enter trade-in/deal structure information.
- Select lenders and submit the deal.
- Select lender for callback.
- Complete and print the Risk-Based Pricing Notice.
- Complete the deal structure.
- Verify lender information and print the forms.
- Create a BHPH deal.

Tip

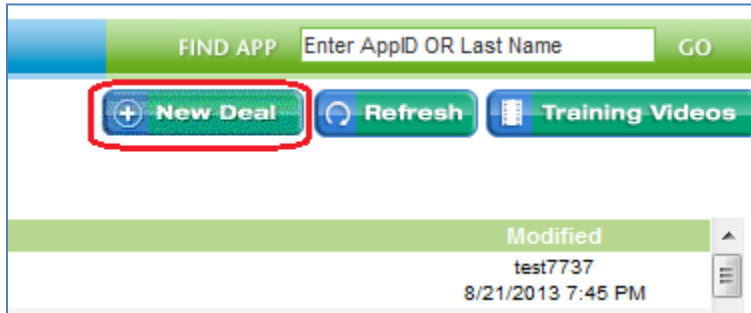
You can track your deals by selecting **Deals** on the AppOne® homepage.

Deal Workflow



Complete Applicant Information

1. On the right hand side of the screen, click the New Deal button.



2. Enter applicant information on the Customer tab.
 - The fields with blue, bolded titles are required. The fields with grey titles are not required but helpful with applications for sub-prime loans.
 - To enter information for joint borrowers, cosigners, or guarantors, select the appropriate option in the **Application Type** drop-down list.

Note:

Do not check the **Cash Deal** box when creating a financed deal. See [Create a Cash Deal](#) if you want to create a cash deal.

- When complete, click the **Proceed to Next Step** button.

Save

Proceed To Next Step >>

Application Type: 1 Individual

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

FName: JEROME

MI:

LName: MOCHO

Suffix:

SSN: 748

- 74

- 9823

DOB: 5

/ 5

/ 1981

Home Phone: 472

- 478

- 4792

Cell Phone:

-

-

DL No:

Email:

Current Residence Information

Address: # 111

Street: 1ST ST S

Apt #:

Zip/City/State: 11211

BROOKLYN

NY

County: KINGS

How Long? 8

years 0

months

Status: own

Rent/Mortgage Pmt: \$0

Landlord/Mortgage Co:

Landlord/Mortgage Phone:

-

-

Current Employment Information

Status: student

Occupation: STUDENT

Employer Name: STUDENT

Address: STUDENT

Zip/City/State: 11211

BROOKLYN

NY

Gross Salary: \$4,343

/ Annual

Work Phone: 472

- 478

- 4792

How Long? 4

years 0

months

☐ Click Here To Enter a Second Job

Other Income Information

Gross Other Income: \$0

/

* Other Income Source:

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18

☐ **Cash Deal**
Application Type: 1 Individual

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

FName: TEST MI: LName: RV Suffix:
 SSN: 894 - 35 - 8356 DOB: 11 / 11 / 1985 Home Phone: 893 - 475 - 8923 Cell Phone: DL No: Email:

Current Residence Information

Address #: 125 Street: DRIFTWOOD DR Apt #: 100 Zip/City/State: 56303 SAINT CLOUD MN County: STEARNS How Long? 3 years 0 months Status: own Rent/Mortgage Pmt: \$1,200 Landlord/Mortgage Co: Landlord/Mortgage Phone: ☐ Enter Mailing Address (different than Current/Physical Address)

Current Employment Information

Status: student Occupation: STUDENT Employer Name: STUDENT Address: STUDENT Zip/City/State: 56303 SAINT CLOUD MN Gross Salary: \$1,200 / Monthly Work Phone: 893 - 475 - 8923 How Long? 3 years 0 months ☐ Click Here To Enter a Second Job

Other Income Information

Gross Other Income: \$0 / * Other Income Source:

Insurance Information

Company Name: Agent Name: Agent Phone: Policy Number: Deductible: \$0.00

☐ Personal Reference #1 ☐ Personal Reference #2 ☐ Personal Reference #3 ☐ Personal Reference #4

Pull a New Credit Report

Note

Available to dealers signed up with CREDCO only. Refer to Sign-up for CREDCO for more information.

1. Select the credit bureau from the drop-down.

☒
Selected Bureau

☐ Pull New Report
 ☐ Bypass Bureau Errors

2. Select the **Pull New Report** check box. The first bureau pulled becomes the selected credit bureau for the credit application.
3. Click the **Pull Credit Report** button.

The screenshot shows a web interface for pulling a credit report. At the top, there is a dropdown menu set to 'Equifax'. Below it are two checkboxes: 'Pull New Report' (checked) and 'Bypass Bureau Errors' (checked). To the right of these are two buttons: 'Pull Credit Report' (highlighted in blue) and 'Print Credit Report'. Below the buttons, the name 'MIKE LUND' is displayed. A large text area contains the following information:

```

-----
REF:3-00137-83823-0000 08/21/2013      TID:3-00137-83823 08/21/2013 13:42:18
Credco Executive Summary                Acct: 4006920
Prepared for: TEST APPONE/CYRUS - CAR    Notes: IM
-----
App: LUND, MIKE                        Dob: 05/05/81  Ssn: XXX-XX-2394
Curr Addr: 1111 1ST ST S, BROOKLYN, NY 11211
-----
BUREAU SCORE INFORMATION
-----
Possible incomplete data. See Credit Report.
Score not activated. Call 1-800-694-1414 for more information.

RED FLAG COMPLIANCE INFORMATION
-----
OFAC not activated. Call 1-800-694-1414 for more information

Prepared By: Corelogic Credco
P.O. BOX 509124
SAN DIEGO, CA 92150
Contact: 1-800-986-4343 Fax: 800 237 6526
  
```

4. To print the credit report, click the **Print Credit Report** bulletin. The credit report opens in a separate window to enable printing.
5. To continue processing the deal, click the **Proceed to Next Step** button.

Enter Collateral Information

In the **Collateral Type** field, select the type of collateral (such Automobile, Recreational Vehicle, or Marine). Enter the remaining information depending on the type of collateral.

For Automobiles

1. Enter the **VIN** number.
2. Click the **Lookup** button.

- Select the **Enable Manual Entry** option to manually enter vehicle information only if the VIN is not located in the system.

Vehicle Information

Collateral Type: Automobile

Type: Used ☐ **Enable Manual Entry**

VIN: 89237489127458972 Lookup

Year:

Make:

Model:

Body Style:

Fuel Type:

Mileage:

Color:

3. Verify the **Body Style**.
4. Enter the **Fuel Type**, **Mileage**, and **Color**.
5. Click the **Bookout** button (when available).
6. Select the vehicle accessories. If there are no accessories, select the **THIS VEHICLE HAS NO OPTIONAL EQUIPMENT** option.

Inventory Stock Number: 123456

Bookout Information

Bookout

	TradeIn	Retail	Loan	AvgTradeIn	RoughTradeIn
Base Values:	25,800	28,700	23,225	24,625	23,150
Mileage Adjustments:	-5,300	-5,300	-5,300	-5,300	-5,300
Final Adjusted Values:	0	0	0	0	0
Final Values (LTV%):	20,500 (155%)	23,400 (136%)	17,925 (177%)	19,325 (164%)	17,850 (178%)

Vehicle Accessories

☐ W/out Auto. Trans.
 ☐ Certified Used
 ☐ Navigation System

☒ **THIS VEHICLE HAS NO OPTIONAL EQUIPMENT.**

For Marine Collateral

1. In the **Boat Information** section, make sure the **Boat** check box is selected.

2. Fill in or verify information in the boat fields. Note that **Type**, **Year**, **Make**, and **Model** fields are required.

Collateral Information

Collateral Type: Marine Inventory Stock Number:

Boat Information

	<input checked="" type="checkbox"/> Boat	<input type="checkbox"/> First Motor	<input type="checkbox"/> Second Motor	<input type="checkbox"/> Trailer
Type:	Used			
Year:	2012			
Make:	Honda			
Model:	Honda V2			
Boat Length:	<input type="text"/>	0.00 HP INBOARD Fuel: <input type="text"/>	0.00 HP INBOARD Fuel: <input type="text"/>	<input type="text"/> Axles
Serial:	546389075789			
ORIGINAL MSRP:	\$5,000.00	\$0.00	\$0.00	\$0.00
Selling Price:	\$6,000.00	\$0.00	\$0.00	\$0.00

(Add applicable Rigging Fees here) (Add applicable Freight Fees here)

- Some lenders for motorcycle, ATV, or UTV loans require an NADA book-out. To complete the NADA book-out, press the **NADA Book-Out** button to open a series of pop-ups. The NADA pop-ups guide you through entry of Year, Make, Model Type, Model & Trim, Options, and Pricing.

App ID: 1305053 Customer Name: JOHN DOE

Customer Credit Bureau **Collateral** Structure Lenders Forms Notes E-Files BETA

Save Proceed To Next Step >>

Collateral Information

Collateral Type: Motorcycle Inventory Stock Number:

NADA Book-Out

Type: **Fuel Type:**

Year: **Serial Number:**

Make: **Model:**

Body Style: **Mileage:** 0

ORIGINAL MSRP: \$0.00

3. Make sure the **First Motor**, **Second Motor**, and **Trailer** check boxes are selected if needed. Verify that the information in the text boxes is correct. Complete or modify as needed.

For Recreational Vehicles, Motorcycles, All-Terrain Vehicles, and Other Collateral

Fill in or verify all information. Note that bold fields are required.

Collateral Type: Motorcycle Inventory Stock Number:

Type: Used **Fuel Type:**

Year: 2008 **Serial Number:**

Make: Harley-Davidson **Model:** FLSTC

Body Style: **Mileage:** 0

ORIGINAL MSRP: \$0.00

For All Collateral

When all information is correct and complete, click the **Proceed to Next Step** button.

Enter Trade-in/Deal Structure Information

1. Review the **Front-End Itemization** section.

Front-End Itemization

Selling Price:	<input type="text" value="\$15,000.00"/>
Trade-In Allowance:	<input type="text" value="\$0.00"/>
Trade-In Payoff:	<input type="text" value="\$0.00"/>
Sales/Other Tax: <input type="text" value="net"/> <input type="text" value="10.00000 %"/>	<input type="text" value="\$1,500.00"/> <input type="checkbox"/> manual override
Rebate:	<input type="text" value="\$0.00"/>
Total Cash Down:	<input type="text" value="\$1,000.00"/> Deferred Down Payment?
Net Purchase:	\$15,500.00

- a. Click the **Deferred Down Payment** link to defer some or all of the down payment. A **Deferred Down Payment** dialog opens.

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 10/13/2014

Note:

Check with your lender to find out if they accept deferred down payments. Most retail indirect lenders including AppOne Lenders do not accept contracts with deferred down payments.

- b. Fill in the deferred down payment information and press the **Update** button.
2. Make sure **Public Officials & Fees** are correct. The fees vary depending on your state and the type of collateral.

Public Officials & Fees		
Title Fee:	<input type="text" value="\$0.00"/>	<input type="checkbox"/> tax
License Fee:	<input type="text" value="\$0.00"/>	<input type="checkbox"/> tax
Registration Fee:	<input type="text" value="\$0.00"/>	<input type="checkbox"/> tax
Inspection Fee:	<input type="text" value="\$0.00"/>	<input type="checkbox"/> tax
Documentation Fee:	<input type="text" value="\$70.00"/>	<input checked="" type="checkbox"/> tax
Notary Fee:	<input type="text" value="\$0.00"/>	<input type="checkbox"/> tax
UCC Filing Fee:	<input type="text" value="\$0.00"/>	<input type="checkbox"/> tax
Dealer Prep Fee:	<input type="text" value="\$30.00"/>	<input checked="" type="checkbox"/> tax <input type="checkbox"/> Add to Selling Price ?
Total Front-End:	\$14,000.00	

3. Review the **Rate & Terms** section.

Rate & Terms	
# of Payments:	<input type="text" value="60"/> <input type="button" value="Monthly"/> ▼
Rate:	<input type="text" value="8.50 %"/>
Contract Date:	<input type="text" value="4/8/2015"/>
Days to First Payment:	<input type="text" value="30"/>
First Payment Date:	05/08/2015
Last Payment Date:	04/08/2020

4. Make sure the **Back-End Products** are itemized as applicable. You will have another opportunity to complete back-end products when you complete the deal structure.
5. If applicable, complete the **Trade-In** information section.

Trade-In Information

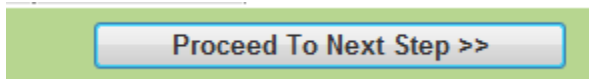
☒ **Trade-In #1 Information**

Serial #: Year: Make: Model:

Mileage: Lien Holder: Phone: Account #:

☐ **Trade-In #2 Information**

6. When all information on the page is complete and correct, click the **Proceed to Next Step** button.



Select Lenders and Submit the Deal

1. Select all applicable AppOne lenders.

■ Lenders with gray boxes are not available for selection.

Integrated Lenders						
	Default Program	ALLY RV Program	ALLY RV Express	Boulevard RV Program	Default Program	BOA RV Indirect
# Borrowers	n/a	✓	n/a	n/a	n/a	n/a
Collateral Age	n/a	n/a	n/a	n/a	n/a	✓
Boat Collateral	n/a	n/a	n/a	n/a	n/a	✓
Collateral Mileage	n/a	n/a	n/a	n/a	n/a	✓
Notes	-	-	-	-	-	-
SELECT LENDER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	-	-	Manual Print		-	-

	BOA RV Broker	BOA RV Consignment	BOA Direct-to-Consumer (Approval Letter) RV	CCU RV- S1 Program	Marine One Motorhome Program	Marine One RV Program
Collateral Age	✓	✓	✓	n/a	n/a	n/a
Boat Collateral	✓	✓	✓	n/a	n/a	n/a
Collateral Mileage	✓	✓	✓	n/a	n/a	n/a
FICO Score	n/a	n/a	n/a	n/a	?	?
Down Payment	n/a	n/a	n/a	n/a	✗	✗
Min Loan Amount	n/a	n/a	n/a	n/a	✓	✓
Max Loan Amount	n/a	n/a	n/a	n/a	✓	✓
Lending Area	n/a	n/a	n/a	n/a	✓	✓
Max Advance	n/a	n/a	n/a	n/a	✓	✓
Income	n/a	n/a	n/a	n/a	✓	✓
Collateral	n/a	n/a	n/a	n/a	✓	✓
Notes	-	-	-	-	-	-
SELECT LENDER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	-	-	-	Manual Print		-

■ Select all applicable lenders from the list of fax lenders.

Fax Lenders						
	Bank of America, N.A.	Bank of America, N.A.	Bank of America, N.A.	Bank of America, N.A.	Bank of America, N.A.	Bank of America, N.A.
Fax	888-296-7089 <input type="checkbox"/> Save	888-296-7089 <input type="checkbox"/> Save	888-296-7089 <input type="checkbox"/> Save	888-296-7089 <input type="checkbox"/> Save	888-296-7089 <input type="checkbox"/> Save	888-296-7089 <input type="checkbox"/> Save
Notes	-	-	-	-	-	-
SELECT LENDER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Manual Print	Manual Print	Manual Print	Manual Print	Manual Print	Manual Print

	abc	Bank of the West	Citizens Bank	Credit Union Direct Lending	Test DocOne Web Lender	Fort Knox TEST BANK
Fax	111-122-2222 <input type="checkbox"/> Save	000-000-0000 <input type="checkbox"/> Save	000-000-0000 <input type="checkbox"/> Save	<input type="text"/> <input type="checkbox"/> Save	<input type="text"/> <input type="checkbox"/> Save	111-222-1234 <input type="checkbox"/> Save
Notes	-	-	-	-	-	-
SELECT LENDER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Manual Print	-	Manual Print	-	-	Manual Print

2. Click the **Submit to Selected Lenders** button.

Note

Click the Manual Print button to create a placeholder callback record and proceed to printing documents. Use this option only if you have already submitted this application to the lender through some other means. See [Create a deal for document preparation only](#) for more information.

Receive a Deal Status and Select Lender for Callback

App ID: 37110 Customer Name: ROGER GOODWILL

Lenders Forms Notes

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

Lender:	test bank ✓	Bank of America, N.A.	CITIZ Fax Program
Transmission Status:	NOT SENT	NOT SENT	NOT SENT
Lender AppID:			
Analyst Name:			
Analyst Phone:			
Decision:	Approved PRINT CALLBACK	Approved PRINT CALLBACK	Approved PRINT CALLBACK
Expiration Date:			
Buy Rate:	0.00%	0.00%	0.00%
Max Rate:	-	-	-
Max Term:	0	0	0
Max Advance:	\$0.00	\$0.00	\$0.00
Max Loan Amount:	\$0.00	\$0.00	\$0.00
Max Payment:	\$0.00	\$0.00	\$0.00
Max VSC:	\$0.00	\$0.00	\$0.00
Max GAP:	\$0.00	\$0.00	\$0.00
Max Back-End:	\$0.00	\$0.00	\$0.00
Min Cash Down:	\$0.00	\$0.00	\$0.00
Aoq Fee:	\$0.00	\$0.00	\$0.00
Trade Equity:	\$0.00	\$0.00	\$0.00
Special Stips:			
Submit Notes to Lender:	-	-	-
Notes:			
SELECT CALLBACK:	SELECT/PRINT	SELECT/PRINT	SELECT/PRINT

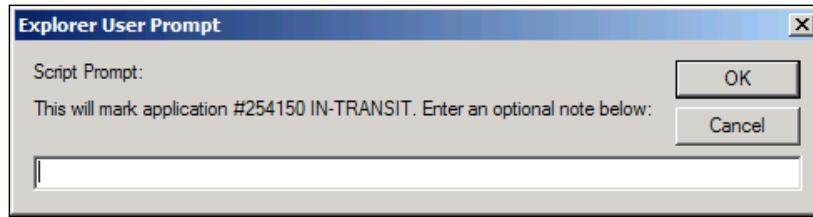
- For AppOne lenders, complete the following:
 - Click the browser's refresh button to check if the decision was returned.
 - If you leave this page and want to return, select **Home** on the Menu bar. Select the ID # for the deal.
- For user-added lenders, complete the following:
 - Select an option in the **Decision** list.
 - Complete the remaining information.
- After the decisions are complete click the **Save** button.

Contract Information

- **Buy Rate:** The minimum rate for the contract. The contract rate cannot be below this rate.
- **Max Rate:** The maximum rate for the contract. The contract rate cannot exceed this rate.
- **Max Term:** The maximum term for the contract. The contract term cannot exceed this term.
- **Max Advance:** The approved advance amount returned by the lender. For most lenders, this is the approved line 3 amount for the contract. The Line 3 amount includes all front end contract itemizations such as sales tax and title/license/registration/documentary fees, but excludes back-end products like Vehicle Service Contract and GAP.
- **Max Loan Amount:** The approved maximum loan amount including the total of any front end/contract itemizations such as taxes and fees, and backend products such as GAP insurance.
- **Max Payment:** The approved payment amount returned by the lender. If this amount is greater than \$0, the contract monthly payment amount cannot exceed this amount.
- **Max VSC:** The maximum amount allowable for a Vehicle Service Contract product as returned by the lender. If this amount is greater than \$0, the retail selling price of the VSC product to the customer cannot exceed this amount.
- **Max GAP:** The maximum amount allowable for a GAP product as returned by the lender. If this amount is greater than \$0, the retail selling price of the GAP product to the customer cannot exceed this amount.
- **Max Back-End:** The maximum amount allowable for back-end/insurance products as returned by the lender. If this amount is greater than \$0, the combined total retail selling price of all back-end/insurance products to the customer cannot exceed this amount.
- **Min Cash Down:** The minimum cash down amount returned by the lender. If this amount is greater than \$0, the customer must be required to put down a minimum cash down payment equal to this amount and this must be reflected on the contract.
- **Acq fee:** The acquisition fee amount as returned by the lender. This is the fee charged to your dealership for purchasing this contract and will be netted out of your contract proceeds. By law, you are not permitted to charge this fee or pass on this fee to your customer.
- **Trade Equity:** The minimum amount of trade-in equity as returned by the lender. If this amount is greater than \$0, the contract must reflect a minimum amount of trade-in equity equal to this amount.
- **Special Stips:** Any special stipulations (e.g. POI, POR etc.) as returned by the lender will either be displayed here or in the Notes section.
- **Notes:** Includes special stipulations returned by the lender.

Buttons

- Click the **Mark in Transit** button to make the deal in transit.



Explorer User Prompt

Script Prompt:

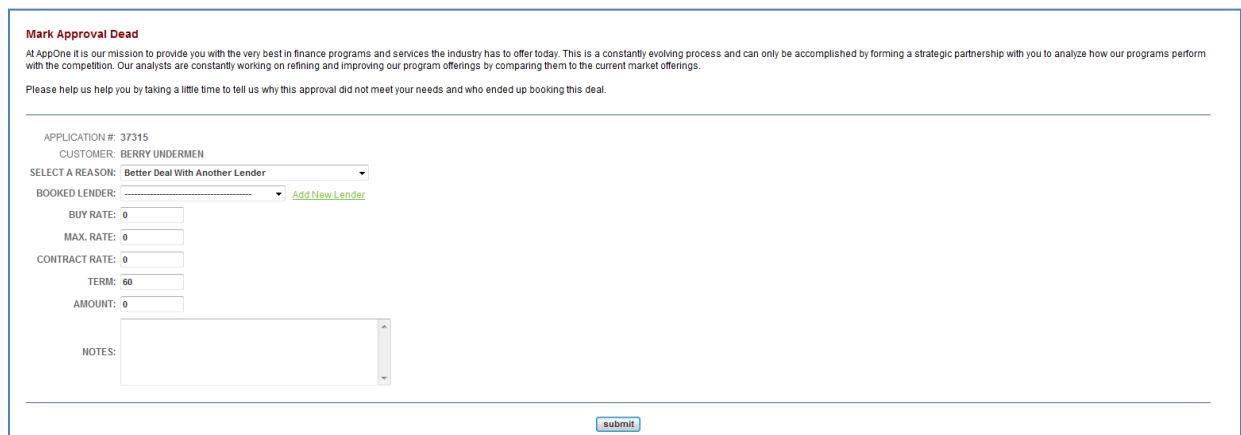
This will mark application #254150 IN-TRANSIT. Enter an optional note below:

OK

Cancel

A text input field for an optional note.

- Click the **Mark Dead** button to mark the approval dead.



Mark Approval Dead

At AppOne it is our mission to provide you with the very best in finance programs and services the industry has to offer today. This is a constantly evolving process and can only be accomplished by forming a strategic partnership with you to analyze how our programs perform with the competition. Our analysts are constantly working on refining and improving our program offerings by comparing them to the current market offerings.

Please help us help you by taking a little time to tell us why this approval did not meet your needs and who ended up booking this deal.

APPLICATION #: 37315
CUSTOMER: BERRY UNDERMEN

SELECT A REASON: Better Deal With Another Lender

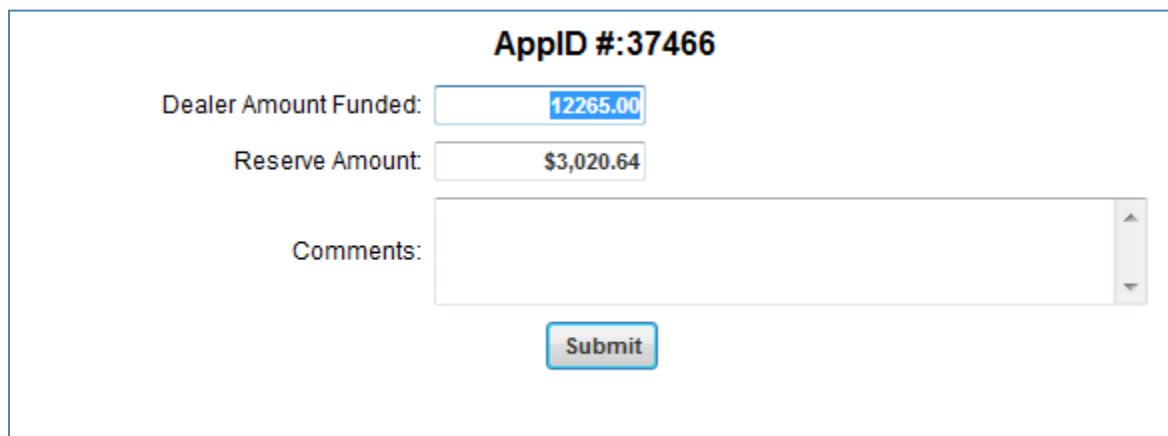
BOOKED LENDER: Add New Lender

BUY RATE: 0
MAX. RATE: 0
CONTRACT RATE: 0
TERM: 60
AMOUNT: 0

NOTES:

submit

- Click the **Mark Active** button to activate a deal that was previously marked dead.
- Click the **Mark Deal Funded** button to mark the deal funded.



AppID #:37466

Dealer Amount Funded: 12265.00

Reserve Amount: \$3,020.64

Comments:

Submit

- Click the **Un Mark Deal Funded** button to remove the funded status from a previously funded deal.

- Click the **Submit to Lenders** button to return to the **Submit to Lenders** screen.
- Click the **Save** button to save callback information from fax lenders.

Complete and Print the Risk-Based Pricing Notice

Note

Available to dealers signed up with Credco only. Refer to [Sign up for CREDCO](#) for more information.

1. On the Forms tab, click the Print Risk Based Pricing Notice button.

Application Number : 37315

Select Applicant: BERRY UNDERMEN ▼

Print Risk Based Pricing with Score
Print Risk Based Pricing with No Score

2. Click the Print Risk based Pricing with Score or Print Risk based Pricing with No Score to print the document.

The screenshot shows a web browser window with the URL <https://demo.external.appone.net/IDS/DocOne/view.aspx?guid=GUID2bb7d4bb-b97c-4f61-a3ac-e63e8a819577>. The page displays a form for a Risk-Based Pricing Notice. The form is titled "Your Credit Score and the Price You Pay for Credit" and includes the subtitle "Risk-Based Pricing Notice - Exception form for loans not secured by one to four family RE". The form contains the following information:

<p>Lender Name and Address</p> <p>DO NOT TOUCH RMS Auto Sales GA</p> <p>RR 2 BOX 126</p> <p>SUMMERSVILLE, GA 15864</p>	<p>Borrower Name and Address</p> <p>ALAN APPLICANT</p> <p>98765 OCEAN VIEW CT</p> <p>CHATSWORTH, CA 91311</p>
<p>Date: 01/20/2011</p>	<p>Loan Number: 254150</p>

Complete the Deal Structure

1. Click the **Select/Print** button for the lender.

Lender:	test bank ✓	Bank of America, N.A.	CITIZ Fax Program
Transmission Status:	NOT SENT	NOT SENT	NOT SENT
Lender AppID:	<input type="text"/>	<input type="text"/>	-
Decision:	Approved ▼ PRINT CALLBACK	Approved ▼ PRINT CALLBACK	Approved ▼ PRINT CALLBACK
Expiration Date:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Buy Rate:	<input type="text"/> 0.00%	<input type="text"/> 0.00%	<input type="text"/> 0.00%
Max Rate:	<input type="text"/> 0.00%	<input type="text"/> 0.00%	<input type="text"/> 0.00%
Max Term:	<input type="text"/> 0	<input type="text"/> 0	<input type="text"/> 0
Max Advance:	<input type="text"/> \$0.00	<input type="text"/> \$0.00	<input type="text"/> \$0.00
Max Loan Amount:	<input type="text"/> \$0.00	<input type="text"/> \$0.00	<input type="text"/> \$0.00
Max Payment:	<input type="text"/> \$0.00	<input type="text"/> \$0.00	-
Max VSC:	<input type="text"/> \$0.00	<input type="text"/> \$0.00	<input type="text"/> \$0.00
Max GAP:	<input type="text"/> \$0.00	<input type="text"/> \$0.00	<input type="text"/> \$0.00
Max Back-End:	<input type="text"/> \$0.00	<input type="text"/> \$0.00	<input type="text"/> \$0.00
Min Cash Down:	<input type="text"/> \$0.00	<input type="text"/> \$0.00	-
Acq Fee:	<input type="text"/> \$0.00	<input type="text"/> \$0.00	-
Trade Equity:	<input type="text"/> \$0.00	<input type="text"/> \$0.00	<input type="text"/> \$0.00
Analyst Name:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Analyst Phone:	- <input type="text"/> Ext: <input type="text"/>	- <input type="text"/> Ext: <input type="text"/>	- <input type="text"/> Ext: <input type="text"/>
Submit Notes to Lender:	-	-	-
Special Stips:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Notes:	<input type="text"/>	<input type="text"/>	<input type="text"/>
SELECT CALLBACK:	<input type="button" value="SELECT/PRINT"/>	<input type="button" value="SELECT/PRINT"/>	<input type="button" value="SELECT/PRINT"/>

2. Review the **Front-End Itemization**, **Public Officials & Fees**, and **Rate & Term** information.
3. Review the **Rate & Terms** section.

4. Select the corresponding check box to add a back-end product such as warranty or gap insurance if applicable.

Back-End Products

☒ **Vehicle Service Contract** \$2,000.00

Company:

Coverage Term: ☐ Unlimited? Mileage: ☐ Unlimited?

Coverage Description:

Deductible:

Dealer Cost: Tax: ☐ Override

☒ **GAP** \$0.00

Company:

Coverage Term: ☐ Unlimited?

Coverage Description:

Dealer Cost: Tax: ☐ Override

☐ **Credit Life** \$0.00

☐ **Credit Disability** \$0.00

☐ **Tire & Wheel Protection** \$0.00

5. Complete the product warranty information if applicable.
6. Complete the **Gap Insurance** information if applicable.
7. Click the **Save** button when complete.
8. Correct missing information or select the check box to override validation.

The following warnings were found on this form:

- Code: 998. Message: Contract Term exceeds max term of 0.

Select Deal Type: Select Application Type:

☐ By checking this box, I hereby acknowledge having read and understood the warning messages above and take full responsibility for any discrepancies or issues that may occur with the funding of this deal with the lender and/or enrollment of back-end products with the respective product providers.

Verify Lender Information/Print Forms

1. On the **Forms** tab, complete the insurance information.

Insurance (Loss Payee) Information ☐ Same as LienHolder Information

Name: Marine One Acceptance Corporation

Address1: 5000 Quorum Dr Address2: Suite 200

Zip / City / State: 75254 Dallas TX

2. Review the lender information.

LienHolder Information

Name: Marine One Acceptance Corporation

State Lien Holder Code: 7526895100

Address1: 5000 Quorum Dr Address2: Suite 200

Zip / City / State: 75254 Dallas TX

Phone: 800-262-8734 Fax: 800-379-2837

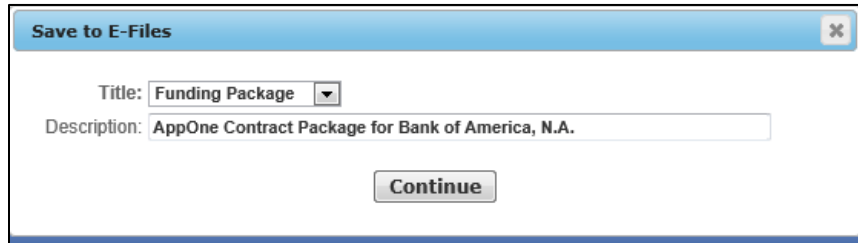
3. For non-integrated lenders only: Select a batch in the **Form Batch** list.
4. To save the forms to the **E-Files** tab, check the **Also Save to E-Files** box. See [Work with Scanned Documents](#) for more information on using the **E-Files** tab.
5. Click the **Print Selected Forms** button to open a PDF with all the forms.

☐ Also Save to E-Files

Integrated Lender Forms

<input checked="" type="checkbox"/> Generic Funding Cover Sheet for MVM/GSM	<input checked="" type="checkbox"/> Bank of America Delivery Receipt and Storage Agreement	<input checked="" type="checkbox"/> Motor Vehicle Title Application (Louisiana) Rev. 05/31/2012
<input checked="" type="checkbox"/> Bank of America Credit Application - Applicants 1 & 2	<input checked="" type="checkbox"/> Bank of America Memorandum of Acceptance (RV)	<input checked="" type="checkbox"/> Bank of America ACH Form
<input checked="" type="checkbox"/> Bank of America Customer Identification Verification Form - Applicants 1 - 2	<input checked="" type="checkbox"/> Odometer Disclosure Statement (General)	<input checked="" type="checkbox"/> Bank of America Funding Checklist (Rev. 10/2014)
<input checked="" type="checkbox"/> Bank of America Certificate of Financial Statement	<input checked="" type="checkbox"/> Agreement to Provide Insurance (General)	<input checked="" type="checkbox"/> Bank of America Guarantee of Lien
<input checked="" type="checkbox"/> Bank of America Power of Attorney	<input checked="" type="checkbox"/> Buyers Order (Louisiana) Rev. 10/31/2010	

- If **Also Save to E-Files** is checked, a Save to E-Files pop-up opens. Select a **Title**, enter a **Description**, and click the **Continue** button. See [Work with Scanned Documents](#) for more information on using the **E-Files** tab.



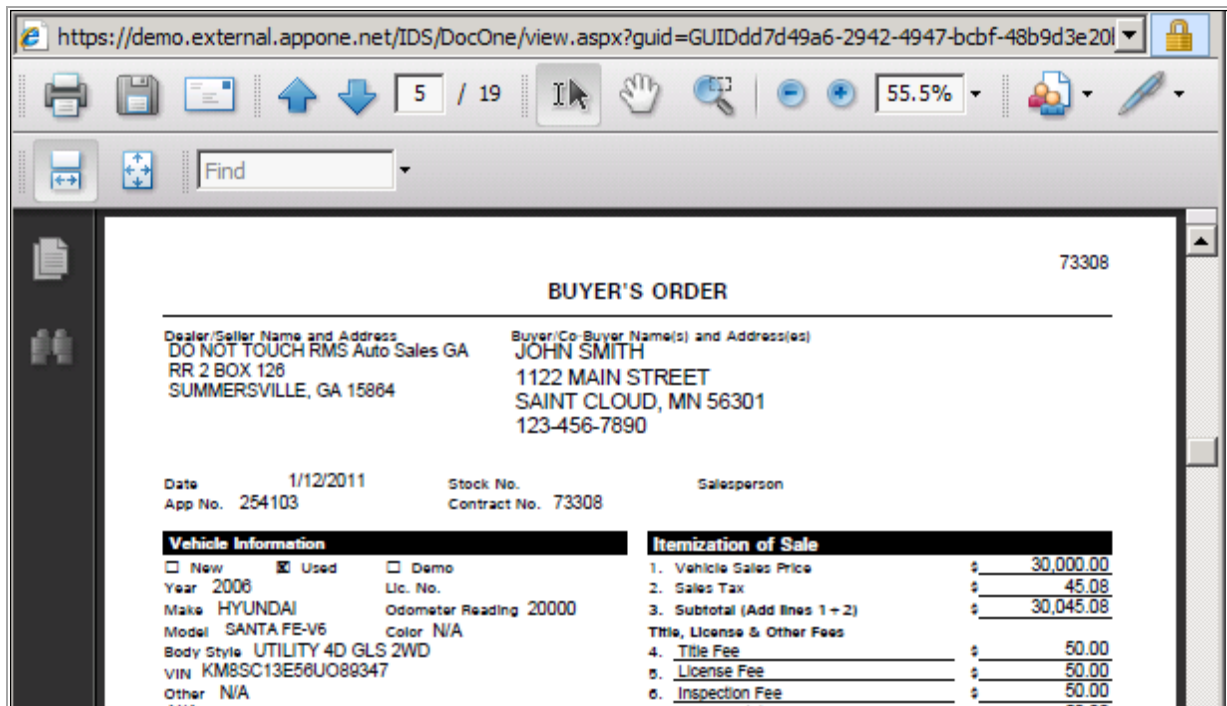
Save to E-Files

Title: **Funding Package**

Description: **AppOne Contract Package for Bank of America, N.A.**

Continue

6. Print the forms as applicable.



https://demo.external.appone.net/IDS/DocOne/view.aspx?guid=GUIDdd7d49a6-2942-4947-bcbf-48b9d3e201

5 / 19 55.5%

BUYER'S ORDER 73308

Dealer/Seller Name and Address: DO NOT TOUCH RMS Auto Sales GA, RR 2 BOX 126, SUMMERSVILLE, GA 15864

Buyer/Co-Buyer Name(s) and Address(es): JOHN SMITH, 1122 MAIN STREET, SAINT CLOUD, MN 56301, 123-456-7890

Date: 1/12/2011, App No.: 254103, Stock No.: 73308, Contract No.: 73308, Salesperson:

Vehicle Information		Itemization of Sale	
<input type="checkbox"/> New	<input checked="" type="checkbox"/> Used	1. Vehicle Sales Price	\$ 30,000.00
Year: 2008	<input type="checkbox"/> Demo	2. Sales Tax	\$ 45.08
Make: HYUNDAI	Uc. No.	3. Subtotal (Add lines 1 + 2)	\$ 30,045.08
Model: SANTA FE-V6	Odometer Reading: 20000	Title, License & Other Fees	
Color: N/A		4. Title Fee	\$ 50.00
Body Style: UTILITY 4D GLS 2WD		5. License Fee	\$ 50.00
VIN: KM8SC13E56U089347		6. Inspection Fee	\$ 50.00
Other: N/A			

7. Close the PDF file after completion.

Create a BHPH Deal

Before creating Buy Here/Pay Here (BHPH) deals:

- Set up your business as a lender. See [Set Up Lenders](#).
- You may want to set up a form batch for BHPH deals. See [Set Up Form Batches](#).

To create a BHPH deal

1. On the Home page, click the **New Deal** button.
2. Enter applicant information on the **Customer** tab. Click **Proceed to Next Step**.
3. Enter collateral information on the **Collateral** tab. Click **Proceed to Next Step**.
4. On the **Structure** tab, verify and complete information as necessary.
 - In the **Front-End Itemization** section, enter a **Deferred Down-Payment**, if applicable.
 - In the **Rate & Terms** section, select the term frequency.
5. When you are done on the **Structure** tab, click **Proceed to Next Step**.
6. Locate lender name you set up for your own business. Click **Manual Print**.

Dealer EZ Credit

612-333-4444 ☐ Save

☐

Manual Print

7. When prompted, click **YES, I want to create a manual print**.
8. Click the drop-down arrow next to the decision status and select **Approved**. Then click the **Save** button.
9. Fill in the lender callback information. When all information is complete, click **Save**.
10. Click **Select/Print**.
11. Click **Yes** to verify or change the structure. Otherwise, click **No**.

Confirmation Dialog

Do you want to verify/change the Deal Structure prior to printing forms?

YES NO

12. In the **Dealer Forms** section, select a forms batch.

The screenshot shows a web interface for the 'Dealer Forms' section. It features a blue header bar with the text 'Dealer Forms'. Below the header, there is a dropdown menu currently displaying 'Test batch Appone forms'. To the right of the dropdown are two buttons: 'Edit Batch' and 'Add New Batch'. Below these buttons are two more buttons: 'Select All' and 'Un-Select All'. At the bottom of the interface is a large button labeled 'Print Selected Forms'.

13. Edit the forms batch as necessary

14. Click the **Print Selected Forms** button.

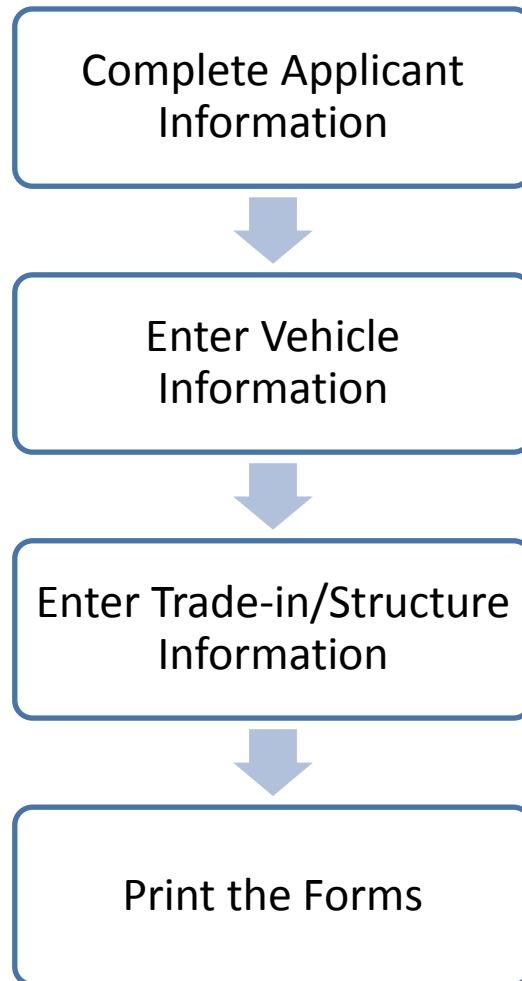
Create a Cash Deal

A cash deal is any deal that does not have a lienholder.

Objectives

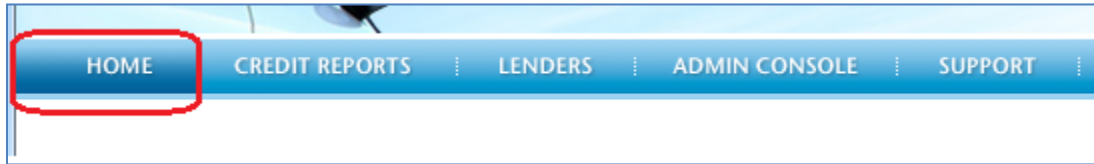
- Review the deal workflow.
- Complete applicant information.
- Enter collateral information
- Enter trade-in/deal structure information.
- Print the forms.

Deal Workflow

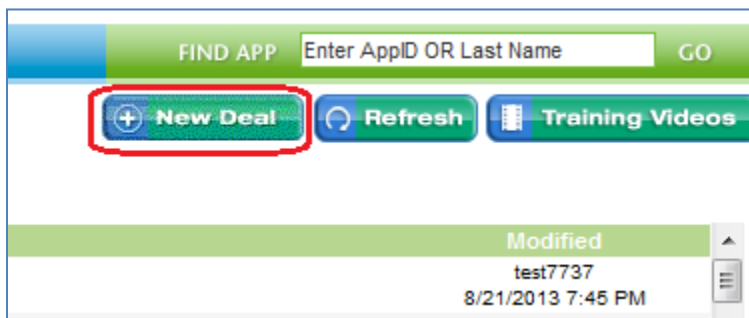


Complete Applicant Information

1. Select **Home** on the menu bar.



2. On the right hand side of the screen, click the **New Deal** button.



3. Check the **Cash Deal** box. Checking the **Cash Deal** box reduces the required (bolded) fields.

The screenshot shows the 'Customer' tab of the AppOne Platform. At the top, there are tabs for 'Customer', 'Credit Bureau', 'Collateral', 'Structure', 'Lenders', 'Forms', and 'Notes'. Below these are 'Save' and 'Proceed To Next Step >>' buttons. The 'Application Type' is set to '1 Individual', and the 'Cash Deal' checkbox is checked and highlighted with a red box. The form is divided into three sections: 'Applicant #1 - Personal Information (MUST MATCH DRIVER'S LICENSE)', 'Current Residence Information', and 'Current Employment Information'. The 'Personal Information' section includes fields for FName, MI, LName, Suffix, SSN, DOB, Home Phone, Cell Phone, DL No, and Email. The 'Current Residence Information' section includes fields for Address #, Street, Apt #, Zip/City/State, County, How Long? (years/months), Status, Rent/Mortgage Pmt, Landlord/Mortgage Co, and Landlord/Mortgage Phone. The 'Current Employment Information' section includes fields for Status, Occupation, Employer Name, Address, Zip/City/State, Gross Salary, and Work Phone.

4. Complete the information on the **Customer** tab. The name (**FName**, and **LName**) and address (**#**, **Street**, **Zip/City/State**, and **County**) are required for a cash deal.
5. Click the **Save** button when complete.

Enter Collateral Information

1. Select the **Collateral** tab and complete the information.
2. In the **Collateral Type** field, select the type of collateral (such **Automobile**, **Recreational Vehicle**, or **Marine**). Enter the remaining information depending on the type of collateral.

For Automobiles

1. Enter the **VIN** number.

2. Click the **Lookup** button.

- Select the **Enable Manual Entry** option to manually enter vehicle information only if the VIN is not located in the system.

Vehicle Information

Collateral Type:

Type: ☐ **Enable Manual Entry**

VIN:

Year:

Make:

Model:

Body Style:

Fuel Type:

Mileage:

Color:

3. Verify the **Body Style**.

4. Enter the **Fuel Type**, **Mileage**, and **Color**.

5. Click the **Bookout** button (when available).

6. Select the vehicle accessories. If there are no accessories, select the **THIS VEHICLE HAS NO OPTIONAL EQUIPMENT** option.

Inventory Stock Number:

Bookout Information

	TradeIn	Retail	Loan	AvgTradeIn	RoughTradeIn
Base Values:	<input type="text" value="25,800"/>	<input type="text" value="28,700"/>	<input type="text" value="23,225"/>	<input type="text" value="24,625"/>	<input type="text" value="23,150"/>
Mileage Adjustments:	<input type="text" value="-5,300"/>	<input type="text" value="-5,300"/>	<input type="text" value="-5,300"/>	<input type="text" value="-5,300"/>	<input type="text" value="-5,300"/>
Final Adjusted Values:	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Final Values (LTV%):	<input type="text" value="20,500"/> (155%)	<input type="text" value="23,400"/> (136%)	<input type="text" value="17,925"/> (177%)	<input type="text" value="19,325"/> (164%)	<input type="text" value="17,850"/> (178%)

Vehicle Accessories
☐ W/out Auto. Trans. ☐ Certified Used ☐ Navigation System
☐ **THIS VEHICLE HAS NO OPTIONAL EQUIPMENT.**

For Marine Collateral

1. In the **Boat Information** section, make sure the **Boat** check box is selected.
2. Fill in or verify information in the boat fields. Note that **Type**, **Year**, **Make**, and **Model** fields are required.

Collateral Information

Collateral Type: Marine Inventory Stock Number:

Boat Information

☒ Boat ☐ First Motor ☐ Second Motor ☐ Trailer

Type: **Used**

Year: **2012**

Make: **Honda**

Model: **Honda V2**

Boat Length: **0.00** HP **INBOARD** **Fuel:**

Serial: **546389075789**

ORIGINAL MSRP: **\$5,000.00**

Selling Price: **\$6,000.00**

(Add applicable Rigging Fees here) (Add applicable Freight Fees here)

3. Make sure the **First Motor**, **Second Motor**, and **Trailer** check boxes are selected if needed. Verify that the information in the text boxes is correct. Complete or modify as needed.

For Recreational Vehicles, Motorcycles, All-Terrain Vehicles, and Other Collateral

1. Fill in or verify information. Note that bold fields are required.

Customer Credit Bureau **Collateral** Structure Lenders Forms Notes E-Files RETA

[Save](#) [Proceed To Next Step >>](#)

Collateral Information

Collateral Type: **RecreationalVehicle** Inventory Stock Number:

Type: **ClassType:**

Year:

Make:

Length:

Invoice/Dealer Cost: **\$0.00**

Serial Number:

Model:

Mileage: **0**

Selling Price: **\$0.00**

Collateral Options

Option Name	Cost Price	Selling Price
<input type="text"/>	<input type="text"/> \$0.00	<input type="text"/> \$0.00

[Add Option](#)

[Save](#) [Proceed To Next Step >>](#)

- Some lenders for motorcycle, ATV, or UTV loans require an NADA book-out. To complete the NADA book-out, press the **NADA Book-Out** button to open a series of pop-ups. The NADA pop-ups guide you through entry of Year, Make, Model Type, Model & Trim, Options, and Pricing.

App ID: 1305053 Customer Name: JOHN DOE

Customer Credit Bureau Collateral Structure Lenders Forms Notes E-Files BETA

Save Proceed To Next Step >>

Collateral Information

Collateral Type: Motorcycle Inventory Stock Number:

NADA Book-Out

Type: Year: Make: Body Style: ORIGINAL MSRP: \$0.00

Fuel Type: Serial Number: Model: Mileage: 0

- Click the **Save** or **Proceed to Next Step** button when complete.

Enter Trade-in/Structure Information

- In the **Structure** tab, verify the information and complete as necessary.

Customer Credit Bureau Collateral Structure Lenders Forms Notes

Save Proceed To Next Step >>

Total Balance Due: \$13,070.00 Total Sales Tax Amount: \$1,500.00

Front-End Itemization

Selling Price: \$15,000.00

Trade-In Allowance: \$0.00

Trade-In Payoff: \$0.00

Sales/Other Tax: net 10.00000 % \$1,500.00 manual override

Rebate: \$0.00

Total Cash Down: \$3,500.00 [Deferred Down Payment?](#)

Net Purchase: \$13,000.00

Public Officials & Fees

Title Fee: \$0.00 tax

License Fee: \$0.00 tax

Registration Fee: \$0.00 tax

Inspection Fee: \$0.00 tax

Documentation Fee: \$70.00 tax

Notary Fee: \$0.00 tax

UCC Filing Fee: \$0.00 tax

Total Front-End: \$13,070.00

Back-End Products

☐ Vehicle Service Contract \$0.00

☐ GAP \$0.00

☐ Credit Life \$0.00

☐ Credit Disability \$0.00

☐ Pre-Paid Maintenance \$0.00

☐ Tire & Wheel Protection \$0.00

☐ Theft Protection \$0.00

☐ Paint Protection \$0.00

☐ Roadside Assistance \$0.00

☐ Windshield Protection \$0.00

☐ Travel Assistance \$0.00

☐ Emergency Alert \$0.00

☐ Tire Blowout Protection \$0.00

Trade-In Information

☐ Trade-In #1 Information

2. If applicable, complete the **Trade-In** information section.

Trade-In Information

☒ **Trade-In #1 Information**

Serial #: Year: Make: Model:

Mileage: Lien Holder: Phone: Account #:

☐ **Trade-In #2 Information**

3. Click the **Save** or **Proceed to Next Step** button when information is verified and complete.

Print Forms

1. In the **Dealer Forms** section, select a forms batch.

Dealer Forms

Bankers Systems Goods & Services Forms

☐ Also Save to E-Files

2. To save the forms to the E-Files tab, check the **Also Save to E-Files** box.
3. Click the **Print Selected Forms** button.
 - If **Also Save to E-Files** is checked, a **Save to E-Files** pop-up opens. Select a **Title**, enter a **Description**, and click the **Continue** button.

Save to E-Files

Title:

Description:

Additional Tasks

Objectives

- Access deals on the Home page.
- View AppOne announcements
- Access active customers to print the Adverse Action.
- Sign up for CREDCO.
- Complete an application quick search.
- Add a note to an application.
- Work with scanned document files.
- Edit dealer information.
- Add a user.
- Delete a user.
- Add Email alerts.

Tip

You can quickly find an application by entering the **ID** or **Last Name** in the **FIND APP** box on the upper right of a page and clicking the **Go** button.

Access Deals on the Home Page

1. Click **Home** on the Menu bar.
2. Select a tab (category).
3. Click the underlined ID# link to open the deal.

Active Deals (69)						New Deal		Refresh	Training Videos
Contracts		Declined/Dead (14)		Funded (3)		Cash Deals (3)			
ID#	Customer	Contract	Amount	Leads	Modified				
1101014	JIM REED	2010 MARINEMAKE MARINEMODEL	\$16,220.00	J-DEF	2/4/2015 9:06 AM				
1101012	JEAN THOMAS	2012 MAKE MODEL	\$16,670.00	BOA-M	2/4/2015 9:01 AM				
1101008	BOBBY BANKRUPT	2009 MARINEMAKE MARINEMODEL	\$13,070.00	BOA-M	2/4/2015 10:14 AM				
1101007	JACK JOHNSON	2009 MAKE MODEL	\$16,670.00	BOA-M	2/4/2015 9:49 AM				
1101003	Kumar Murthy		\$0.00	INCOMPLETE	OnlineCreditApp 2/3/2015 12:55 PM				
1101002	Kumar Murthy		\$16,760.00	INCOMPLETE	2/4/2015 3:27 PM				
1101001	Balaji Murthy		\$0.00	INCOMPLETE	OnlineCreditApp 2/3/2015 12:53 PM				
1101000	Balaji Murthy		\$0.00	INCOMPLETE	OnlineCreditApp 2/3/2015 12:53 PM				
1101008	NICK RYAN	2008 MAKE MODEL	\$13,760.00	BOA-M BOA-MC	2/4/2015 3:34 PM				
1100078	TEST APPONE BALAJI	2016 HONDA ACCORD HONDA ACCORD	\$13,760.00	KYLE-DEF TDB-DEF	2/4/2015 3:38 PM				
1000713	ZACH WILLIAMS / BRIAN WILLIAMS	2011 MAIRNEMAKE MAIRNEMODEL	\$13,070.00	MERRB-M	1/29/2015 11:55 AM				
1000712	ZACH WILLIAMS / BRIAN WILLIAMS	2011 MAIRNEMAKE MAIRNEMODEL	\$13,070.00	MERRB-M	1/29/2015 11:59 AM				
1000707	TED SMART	2009 ATVM/MAKE ATVMODEL	\$16,670.00	MERRB-M	1/29/2015 11:58 AM				
1000008	TODD TESTCO		\$0.00	INCOMPLETE	1/29/2015 11:10 AM				
1000002	BILL TEST	2010 MARINEMAKE MARINEMODEL	\$13,070.00	BOA-M	1/29/2015 11:10 AM				
1000019	Jim Fieldgar		\$0.00	INCOMPLETE	OnlineCreditApp 4/27/2015 3:10 PM				

Tabs

You can access deals filtered by the following tabs:

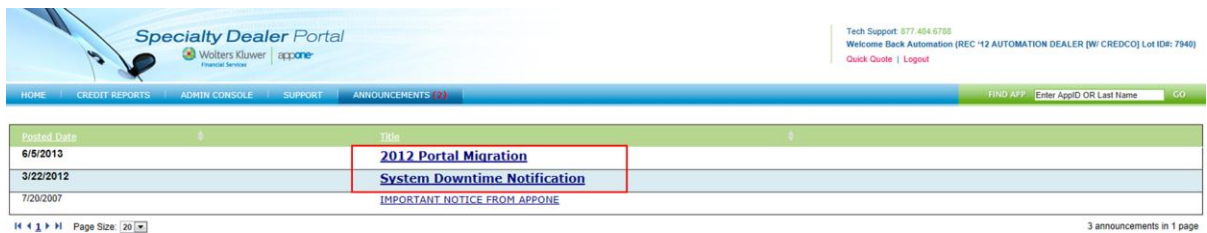
- Problem Deals
- Active Deals
- Contracts in Transit
- Funded Pending Registration
- Decline/Dead
- Funded
- Cash Deals

View AppOne Announcements

Select **Announcements** on the menu bar to view announcements from AppOne.



Click an individual announcement for more information.



Access Active Customers to Print the Adverse Action

1. Click **Credit Reports** in the Menu bar.
2. Select the customer(s).

3. Click the **Print Adverse Action** button.

HOME CREDIT REPORTS LENDERS AD		
Active Customers Pull New Credit Report		
	ID	Name
<input type="checkbox"/>	24372	TIM BRADY
<input type="checkbox"/>	6661	TEST TRAILER
<input type="checkbox"/>	6661	TEST TRAILER

Sign-up for CREDCO

You can access credit reports from Equifax®, Experian® and TransUnion® directly from AppOne. Before accessing credit reports, sign up for First Advantage CREDCO.

1. Select **Credit Reports** on the Menu bar.
2. Select the **Signup** tab.
3. Click the **Click Here to Signup For a CREDCO Account** button.
4. Complete the forms.

Complete an Application Quick Search

1. On the **Home**, **Admin Console**, or **Support** menu bar sections, enter the application ID or Last Name in the **FIND APP** box. Click the **Go** button.

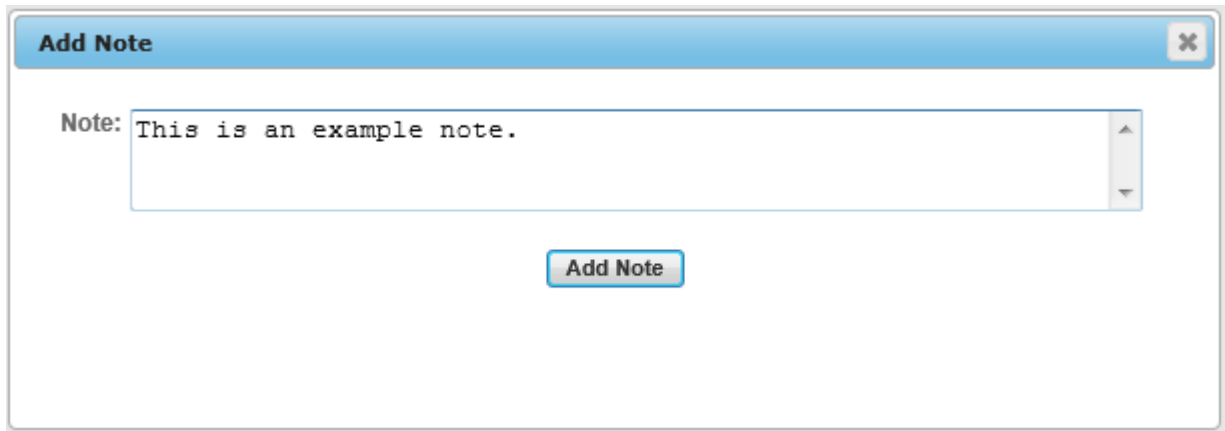
FIND APP	GO
Smith	
Status	Modified
PENDING	fcoleman 7/26/2013 10:51 AM

2. Click the underlined ID# link to open the application.

#	Customer
36560	JACK SMITH
35388	ABLE SMITH

Add a Note to an Application

1. Select the **Notes** tab.
2. Click the **Add Note** button.
3. Enter the note.
4. If your dealership belongs to a service company and you want to send the note to the service company, check the **Send to Service Company** box.
5. Click the **Save** button.

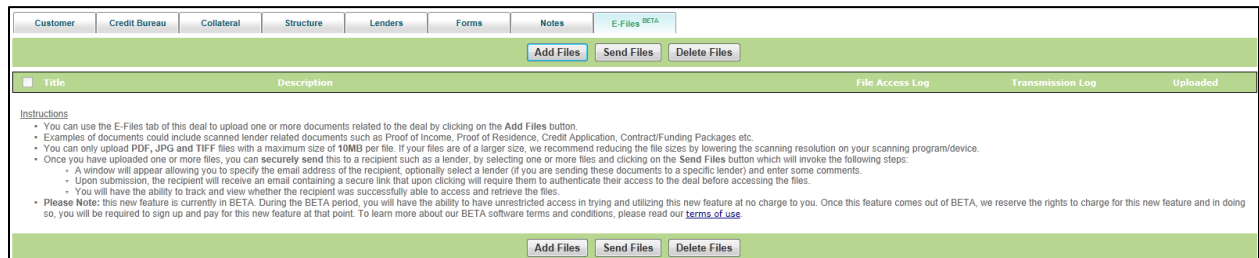


Work with Scanned Documents

Use the **E-Files** tab to add, send, or delete scanned document files to an application. This feature can be used when a lender is in the process of making a decision on an application as well as during the funding process. For example, you can use this feature to send a lender a stipulation (such as proof of income, copy of license, proof of residence, or book-out).

Add a File

1. Select the **E-Files** tab.



Instructions

- You can use the E-Files tab of this deal to upload one or more documents related to the deal by clicking on the Add Files button.
- Examples of documents could include scanned lender related documents such as Proof of Income, Proof of Residence, Credit Application, Contract/Funding Packages etc.
- You can only upload PDF, JPG and TIFF files with a maximum size of 10MB per file. If your files are of a larger size, we recommend reducing the file sizes by lowering the scanning resolution on your scanning program/device.
- Once you have uploaded one or more files, you can securely send this to a recipient such as a lender, by selecting one or more files and clicking on the Send Files button which will invoke the following steps:
 - A window will appear allowing you to specify the email address of the recipient, optionally select a lender (if you are sending these documents to a specific lender) and enter some comments.
 - Upon submission, the recipient will receive an email containing a secure link that upon clicking will require them to authenticate their access to the deal before accessing the files.
 - You will have the ability to track and view whether the recipient was successfully able to access and retrieve the files.
- Please Note:** this new feature is currently in BETA. During the BETA period, you will have the ability to have unrestricted access in trying and utilizing this new feature at no charge to you. Once this feature comes out of BETA, we reserve the rights to charge for this new feature and in doing so, you will be required to sign up and pay for this new feature at that point. To learn more about our BETA software terms and conditions, please read our [terms of use](#)

2. Click the **Add Files** button.

Add Files

File Requirements

- Only PDF, JPG, and TIFF files are allowed.
- Files cannot be larger than 10 MB each.
- Only 10 files can be queued at a time.

#	File Name	Document Title	Description	Size	Progress	Status
Add Files to Upload.						
<input type="button" value="Add Files"/> <input type="button" value="Start Upload"/>				0 b	0%	<input type="button" value="Remove All"/>

3. In the **Add Files** pop-up, click the **Add Files** button.
4. Select the file to upload.
5. Select a **Document Title** from the list and enter a **Description**.
6. Repeat steps 3 through 5 for each file to be uploaded.
7. Click the **Start Upload** button.

Delete a File

1. Select the **E-Files** tab.
2. Check the box corresponding to the document to be deleted.

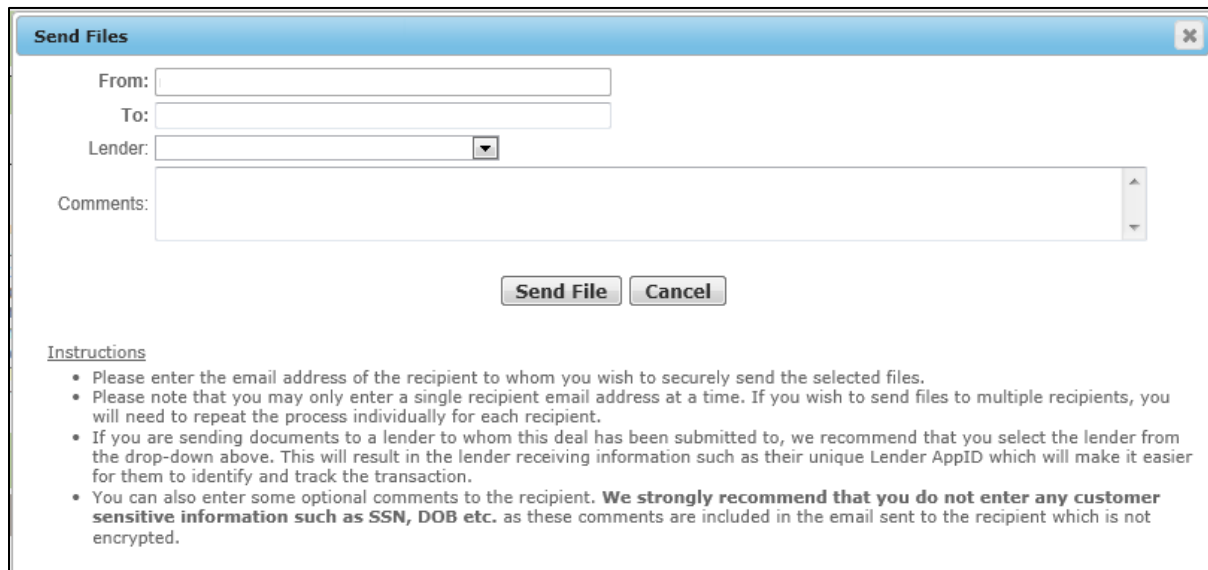
<input type="button" value="Add Files"/> <input type="button" value="Send Files"/> <input type="button" value="Delete Files"/>			
<input checked="" type="checkbox"/> Title	Description	File Access Log	Transmission Log
<input checked="" type="checkbox"/> Driver's License		View Log	View Log

3. Click the **Delete Files** button.

Send a File

1. Select the **E-Files** tab.
2. Check the box corresponding to the document to be deleted.
3. Click the **Send Files** button.

4. In the **Send Files** pop-up, enter an email address in the **To** field, select a **Lender** from the list, and optionally, enter **Comments**. The **From** field is filled automatically.



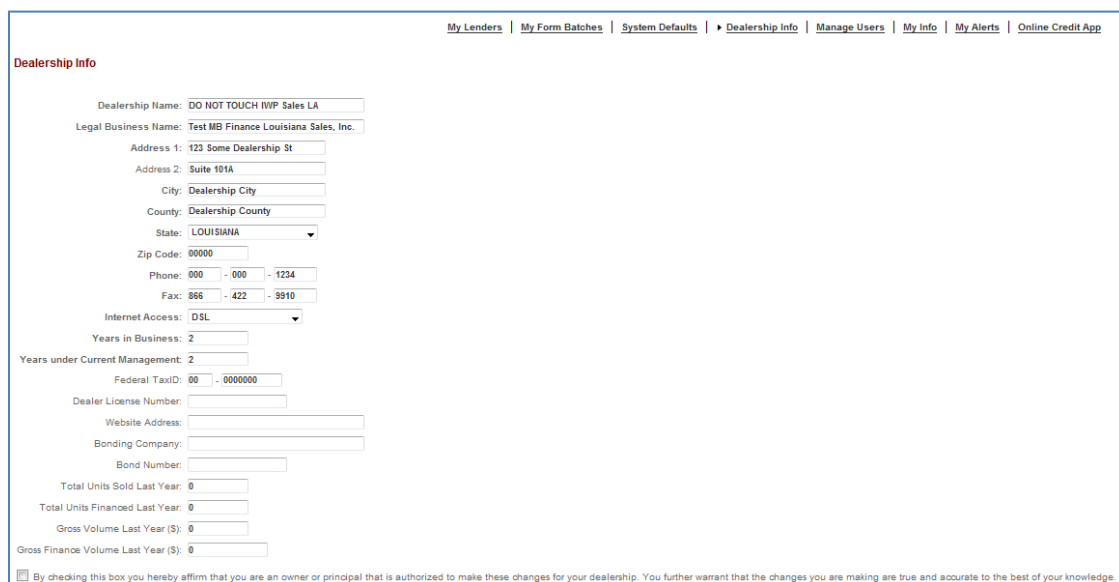
The **Send Files** pop-up window contains the following fields and controls:

- From:** A text field with a pre-filled email address.
- To:** A text field for the recipient's email address.
- Lender:** A dropdown menu with a downward arrow.
- Comments:** A large text area for optional comments.
- Buttons:** **Send File** and **Cancel** buttons.
- Instructions:** A section with the following text:
 - Please enter the email address of the recipient to whom you wish to securely send the selected files.
 - Please note that you may only enter a single recipient email address at a time. If you wish to send files to multiple recipients, you will need to repeat the process individually for each recipient.
 - If you are sending documents to a lender to whom this deal has been submitted to, we recommend that you select the lender from the drop-down above. This will result in the lender receiving information such as their unique Lender AppID which will make it easier for them to identify and track the transaction.
 - You can also enter some optional comments to the recipient. **We strongly recommend that you do not enter any customer sensitive information such as SSN, DOB etc.** as these comments are included in the email sent to the recipient which is not encrypted.

5. Click the **Send File** button.

Edit Dealer Information

1. Select **Admin Console** on the Menu bar.
2. Select **Dealership Info**.
3. Complete the information.



The **Dealership Info** form includes the following fields and sections:

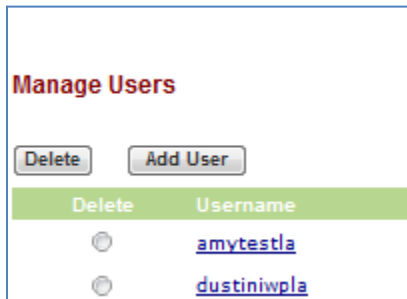
- Navigation Bar:** [My Lenders](#) | [My Form Batches](#) | [System Defaults](#) | [Dealership Info](#) | [Manage Users](#) | [My Info](#) | [My Alerts](#) | [Online Credit App](#)
- Dealership Name:** DO NOT TOUCH IWP Sales LA
- Legal Business Name:** Test MB Finance Louisiana Sales, Inc.
- Address 1:** 123 Some Dealership St
- Address 2:** Suite 101A
- City:** Dealership City
- County:** Dealership County
- State:** LOUISIANA
- Zip Code:** 00000
- Phone:** 000 - 000 - 1234
- Fax:** 866 - 422 - 9910
- Internet Access:** DSL
- Years in Business:** 2
- Years under Current Management:** 2
- Federal TaxID:** 00 - 0000000
- Dealer License Number:**
- Website Address:**
- Bonding Company:**
- Bond Number:**
- Total Units Sold Last Year:** 0
- Total Units Financed Last Year:** 0
- Gross Volume Last Year (\$):** 0
- Gross Finance Volume Last Year (\$):** 0
- Disclaimer:** By checking this box you hereby affirm that you are an owner or principal that is authorized to make these changes for your dealership. You further warrant that the changes you are making are true and accurate to the best of your knowledge.

Note

Only users with administrative rights can edit dealer information.

Add a User

4. Select **Admin Console** on the Menu bar.
5. Select **Manage Users**.
6. Click the **Add User** button.



7. Complete the information.

The screenshot shows the "Add/Edit User" form. It contains the following fields and options:

- First Name:
- Last Name:
- Email Address:
- Title:
- Username: ☐ (Check and click the AutoGenerate button to generate a username.)
- Password: (Click the AutoGenerate button to generate a password.)
- Mobile Phone Number: - -
- Admin:
- Status:
- ☒ Send email to user with login credentials
- ☐ You hereby affirm and warrant that you are an authorized user of your dealership who is approved by management to make changes to the dealership's account and further affirm and warrant that the user named above is an employee of your dealership who is authorized to use this system.
-

8. Click the **Add** button.

Note

Only users with administrative rights can add a user.

Delete a User

1. Select **Admin Console** on the Menu bar.
2. Select **Manage Users**.

3. Select the option button corresponding to the user you want to delete.

Manage Users

Delete	Username	Name
<input type="radio"/>	amytestla	Amy Lear
<input checked="" type="radio"/>	dustiniwpla	dustin n

4. Click the **Delete** button.

Add Email Alerts

1. From the **Admin Console** tab, select **My Alerts**.
2. Enter one or more email addresses under **Recipient Addresses** to receive emailed alerts when an application status changes and/or a lender callback status changes. Addresses must be separated by a semicolon.

[My Lenders](#) | [My Form Batches](#) | [System Defaults](#) | [Reserve Statements](#) | [My Alerts](#)

My Alerts

Alert Name	Description	Recipient Addresses
App Status Change	Application Status Change	<input type="text"/>
Lender Callback Status Change	Lender Callback Status Change	<input type="text"/>

Note

Only users with administrative rights can add email alerts.

Frequently Asked Questions

Questions

- What is the difference between a RouteOne™ lender and a fax lender?
- Is AppOne a lender?
- How do I re-submit a declined deal?
- How do I check the status of a deal I have already submitted?
- How do I locate a deal that I do not see on my screen?
- How do I make the APR match the rate disclosed to the customer?
- How do I unlock an account or reset a forgotten password?
- How do I make the APR match the rate disclosed to the customer?

Tip

Select Support on the Menu bar to access more frequently-asked questions.

What is the difference between a RouteOne lender and a fax lender?

A RouteOne lender is a lender in AppOne that can be contacted electronically. A fax lender is a lender that is contacted by fax.

Is AppOne a lender?

No. AppOne is not a lender and does not make credit decisions. AppOne is an online platform that connects independent car, marine, recreational vehicle, motorcycle, and other dealers with lending sources.

How do I re-submit a declined deal?

1. Select the **Declined/Dead** tab on the Home page.
2. Select the underlined ID number for the deal to open it.
3. Make any needed changes on the **Customer**, **Collateral**, and **Structure** tabs.
4. On the **Lender** tab, click the **Submit to Lenders** button.
5. Select all applicable lenders.
6. Click the **Submit to Selected Lenders** button.

7. If necessary, clone the deal by clicking the clone icon on the home page.

	#	Customer
	<u>45939</u>	TSET MIN FIELDS
	<u>45915</u>	IMOLA TESTCO

How do I check the status of a deal I have already submitted?

1. Select **Home** on the menu bar.
2. Select the underlined ID number for the deal to open it.
3. Check the **Decision** status.

Send Message	Mark In-Transit	Mark Dead	Submit To Lenders
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Lender:	BOA RV Consignment ✓
Transmission Status:	COMPLETED
Lender AppID:	0
Analyst Name:	-
Analyst Phone:	-
Decision:	APPROVED 8/26/2013 4:18 PM
Expiration Date:	-
Buy Rate:	2.00%
Max Rate:	22.00%
Max Term:	160 mths
Max Advance:	-
Max Loan Amount:	\$999,999.00
Max Payment:	-

If the **Decision** status is **DECLINED**, the **Notes** field provides a reason.

Lender:	MBF RV Program
Transmission Status:	COMPLETED
Lender AppID:	0
Analyst Name:	Linda Przybylski
Analyst Phone:	8476532371
Decision:	DECLINED 9/9/2013 2:54 PM
Expiration Date:	-
Buy Rate:	-
Max Rate:	3.00%
Max Term:	160 mths
Max Advance:	-
Max Loan Amount:	-
Max Payment:	-
Max VSC:	\$2,500.00
Max GAP:	\$699.00
Max Back-End:	\$4,000.00
Min Cash Down:	-
Acq Fee:	-
Trade Equity:	-
Special Stips:	
Submit Notes to Lender:	-
Notes:	Low Income, . No Credit History, .
SELECT CALLBACK:	-

How do I locate a deal that I do not see on my screen?

1. On the **Home**, **Admin Console**, or **Support** page, enter the application ID or Last Name in the **FIND APP** box. Click the **Go** button.

FIND APP	Smith	GO
Status	Modified	
PENDING	fcoleman	
	7/26/2013 10:51 AM	

2. Click the underlined ID# link to open the application.

#	Customer
 38560	JACK SMITH
 35388	ABLE SMITH

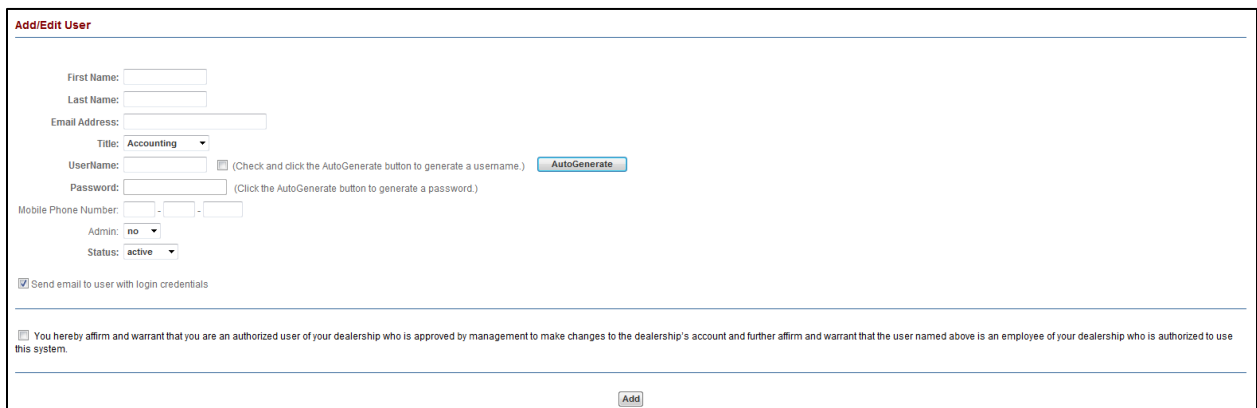
How do I unlock an account or reset a password?

Any user with administrative rights can unlock an account or reset a forgotten password for someone in their organization.

1. Select **Admin Console** on the Menu bar.
2. Select **Manage Users**.
3. Select the **Username** link.



4. In the **Add/Edit User** window, click the **AutoGenerate** button to generate a new password. Changing the password also unlocks the account.



The screenshot shows the 'Add/Edit User' form. It includes the following fields and controls:

- First Name:
- Last Name:
- Email Address:
- Title:
- Username: ☐ (Check and click the AutoGenerate button to generate a username.)
- Password: (Click the AutoGenerate button to generate a password.)
- Mobile Phone Number: - -
- Admin:
- Status:
- ☒ Send email to user with login credentials
- ☐ You hereby affirm and warrant that you are an authorized user of your dealership who is approved by management to make changes to the dealership's account and further affirm and warrant that the user named above is an employee of your dealership who is authorized to use this system.
-

5. Check the box at the bottom of the page showing that you have authorization to make the change.

<input type="checkbox"/> You hereby affirm and warrant that you are an authorized user of your dealership who is approved by management to make changes to the dealership's account and further affirm and warrant that the user named above is an employee of your dealership who is authorized to use this system.
<input type="button" value="Update"/>

6. Click the **Update** button.

How do I make the APR match the rate disclosed to the customer?

In the Admin Console, set up the lender to use the 30/360 accrual method. Using the 30/360 accrual method ensures that the APR on the contract matches the rate the lender gave you on the callback and the rate disclosed to the customer. Using other accrual methods will result in the APR being slightly different than the APR on the callback.

AppOne Contacts

Print this page and add your own **Lot ID #** and **SAP Customer #**. These numbers will help AppOne support if you need to call in. Keep the page at your desk so that it is available when you need to contact AppOne.

Main Number

Specialty Dealer Portal Support Hotline: (inquiries related to the www.AppOne.net web site, technical support, password reset, etc.)

877-404-6788

support@appone.net

Billing

800-552-9410 x1123113

CustomerSupportAppOne@WoltersKluwer.com

Product Information & Sales/Business Manager

Tyler Kelly

877-277-6631, extension 1207947

Tyler.Kelly@wolterskluwer.com

My Lot ID #

My SAP Customer #

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