

AppOne®

**Platform for Virtual F&I Services Quick-
Start Training Guide**

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Get Started

Objectives

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

Log on to AppOne®

Note

The AppOne login page has more information on passwords and logging on. For additional assistance, you can contact your Dealer Owner or Administrator, or call 877-404-6788 (Specialty Dealer Portal Supportline).

1. Navigate to <https://gateway.appone.net/Dealer/vfi/login.aspx>.
 - 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.

AppOne Portal
Wolters Kluwer Financial Services

welcome to the AppOne Portal

Please Note:

- All passwords must include at least 1 Uppercase letter, 1 Number and be at least 8 characters long.
- Your account will be locked out after 5 failed attempts.
- If your account is locked out, please contact the administrator at your dealership/organization to reset your account.
- You are required to change your password once every 60 days.
- If you have forgotten your password, please click on FORGOT YOUR PASSWORD link OR contact the administrator at your dealership/organization to reset your account.

Dealer Login

Username:

Password:

[Forgot your password?](#)

Organization Login

Organization Code:

Username:

Password:

[Forgot your password?](#)

© 2003-2015 Wolters Kluwer Financial Services, Inc. All rights reserved. Tech Support: 877-404-6788 FREE System Requirements | Terms Of Use | Privacy and Cookies Policy

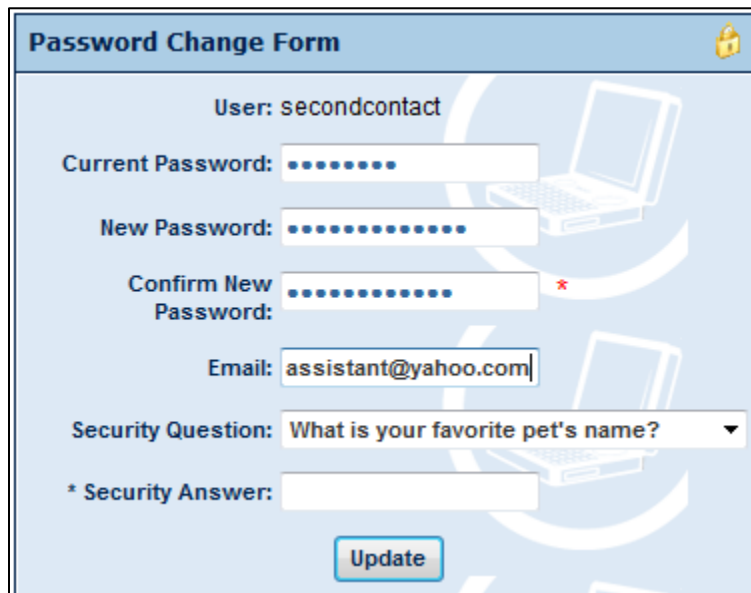
The gray bar at the bottom of the page includes useful links.

- 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.

[Make Home Page](#) | [System Requirements](#) | [Terms Of Use](#) | [Privacy and Cookies Policy](#)

2. In the **Organization Login** area, enter your **Organization code**, **Username** and **Password**. Click the **Sign In** button.
3. The first time you log in, you will be asked to change your password.



The screenshot shows a 'Password Change Form' with a blue header and a lock icon. The form contains the following fields and elements:

- User:** secondcontact
- Current Password:** [password field]
- New Password:** [password field]
- Confirm New Password:** [password field] with a red asterisk indicating a required field.
- Email:** assistant@yahoo.com
- Security Question:** What is your favorite pet's name? (dropdown menu)
- * Security Answer:** [text field]
- Update** button

- 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.

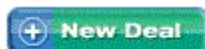
Home: Dealership Dashboard



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 Dealers, Systems Defaults, Lenders, and Forms

Objectives

- Set up system defaults.
- Set up lenders.
- Set up form batches.
- Make a blank credit application available online.

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. For each dealership managed by your organization:

- Set up dealers.
- 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).
- 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 Dealers

1. Select **Admin Console** on the Menu bar.
2. Click the **Manage Dealers** link.

Manage Dealers											
<input type="button" value="Delete"/>		<input type="button" value="Add Dealer"/>									
Show: 50	State: All	Status: All	Search: <input type="text"/>								
Delete	AppOne ID	Org ID	Dealership	Street	City	State	Zip	Status	Modified	Lenders	
<input type="checkbox"/>	8998	234	Chippewa RV	384 3rd St	Clara City	MN	56222	Active	dhntest 8/3/2014 4:35 PM	Lenders	
<input type="checkbox"/>	7771		DO NOT TOUCH CL Hanson FL	1200 Dummy St	Jacksonville	FL	32256	Active	beisenwinter 3/28/2014 12:18 PM	Lenders	
<input type="checkbox"/>	7715		DO NOT TOUCH CL Hanson WY	123 Main Street	Some City	WY	70806	Active	kmtestdh 1/28/2014 12:35 PM	Lenders	
<input type="checkbox"/>	9003	299929	New Dealer	111 Main Street	Waite Park	MN	56387	Active	betestdh 8/3/2014 5:55 PM	Lenders	
<input type="checkbox"/>	8237		Test New CLH Dealer	1111 1st St N	Saint Cloud	MN	56303	Active	betestdh 8/3/2014 5:35 PM	Lenders	
Showing 1 to 5 of 5 entries									Previous	1	Next

3. To add a dealer, click the **Add Dealer** button.

- Complete the dealer information.

Add Dealer	
Location/Store Name: <input type="text"/> Legal Business Name: <input type="text"/> Organization Type: <input type="text" value="Not Applicable"/> Internet Access: <input type="text" value="None"/> Address 1: <input type="text"/> Address 2: <input type="text"/> Zip Code: <input type="text"/> City: <input type="text"/> County: <input type="text"/> State: <input type="text"/> Primary Collateral Sold: <input type="text"/> Phone 1: <input type="text"/> - <input type="text"/> - <input type="text"/> Status: <input type="text" value="Active"/>	Phone 2: <input type="text"/> - <input type="text"/> - <input type="text"/> Fax 1: <input type="text"/> - <input type="text"/> - <input type="text"/> Fax 2: <input type="text"/> - <input type="text"/> - <input type="text"/> Primary Contact Name: <input type="text"/> (first, last) Primary Contact Email: <input type="text"/> Federal Tax ID: <input type="text"/> - <input type="text"/> Dealer License #: <input type="text"/> Dealer License State: <input type="text"/> Years in Business: <input type="text"/> Dealer Management System: <input type="text"/> Website: <input type="text"/> Dealer ID: <input type="text"/>
<input type="checkbox"/> I have received consent from this dealership/store to add them under my organization in AppOne.	
<input type="button" value="Add"/>	

- Select the check box at the bottom of the page to indicate that you have the dealership's consent.
 - Click the **Add** button.
4. To edit a dealer, click the corresponding link in the **AppOne ID** column or the link in the **Dealership** column.
- Modify the dealer information.

- Click the **Update** button.

- To delete a dealer, select the check box in the **Delete** column. Then click the **Delete** button.

Set Up System Defaults

The **System Defaults** page allows 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.

- Select **Admin Console** on the Menu bar.
- Click the System Defaults link.
- Select a dealership from the **Dealer** list.

Dealer:

- 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: City Sales Tax Rate: County Sales Tax Rate:

Fees

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

- 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	<input type="text" value="500.00"/>	<input type="text" value="800.00"/>	<input type="text" value="7.5000 %"/>	<input type="text" value="160"/>	<input type="text" value="200.00"/>	CD Desc	10/4/2013 8:49 AM
Credit Life	-	CL Test	<input type="text" value="300.00"/>	<input type="text" value="575.00"/>	<input type="text" value="8.5000 %"/>	<input type="text" value="150"/>	<input type="text" value="150.00"/>	CL Desc	10/4/2013 8:49 AM
GAP	-		<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.0000 %"/>	<input type="text" value="0"/>	<input type="text" value="0.00"/>		10/4/2013 11:34 AM
Paint Protection	-	PP Test	<input type="text" value="500.00"/>	<input type="text" value="1,300.00"/>	<input type="text" value="5.0000 %"/>	<input type="text" value="130"/>	<input type="text" value="150.00"/>	PP Desc	10/4/2013 8:49 AM
Pre-Paid Maintenance	-	PPM Test	<input type="text" value="800.00"/>	<input type="text" value="1,600.00"/>	<input type="text" value="8.0000 %"/>	<input type="text" value="120"/>	<input type="text" value="300.00"/>	PPM Desc2	10/4/2013 8:49 AM
Roadside Assistance	-	RA Test	<input type="text" value="400.00"/>	<input type="text" value="1,200.00"/>	<input type="text" value="4.0000 %"/>	<input type="text" value="110"/>	<input type="text" value="100.00"/>	RA Desc	10/4/2013 8:49 AM
Theft Protection	-	TP Test	<input type="text" value="600.00"/>	<input type="text" value="1,400.00"/>	<input type="text" value="6.0000 %"/>	<input type="text" value="100"/>	<input type="text" value="200.00"/>	TP Desc2	10/4/2013 8:49 AM
Tire & Wheel Protection	-	TWP Test2	<input type="text" value="700.00"/>	<input type="text" value="1,500.00"/>	<input type="text" value="7.0000 %"/>	<input type="text" value="90"/>	<input type="text" value="250.00"/>	TWP Desc	10/4/2013 8:49 AM
Vehicle Service Contract	-	VSC Test2	<input type="text" value="1,200.00"/>	<input type="text" value="2,000.00"/>	<input type="text" value="12.0000 %"/>	<input type="text" value="80"/>	<input type="text" value="500.00"/>	VSC Desc	10/4/2013 8:49 AM

6. Click the **Update** button when complete.
7. Repeat steps 3 through 6 until all dealerships are set up.

Notes

Only users with administrative rights can change system default information.

The fees are specific to the dealership's state and type of collateral. Make sure you set up system defaults that are appropriate for the specific state.

Set Up Lenders

1. Select **Admin Console** on the Menu bar.
2. Click the **My Lenders** link.
3. Use the **Dealers** and **Collateral Type** lists at the top of the page to filter lenders by dealership and collateral type.
4. Review the **AppOne Lenders** section. This section lists all integrated lender programs that are available for the selected dealership's region and collateral type.

AppOne Lenders

Dealers:

DO NOT TOUCH CL Hanson FL - Jacksonville, FL (#7771)

 Collateral Type:

HorseTrailer

Save

Enable	Lender Name	Program Name	Description	LenderDealerID	LienHolder Address	Insurance Address	Links	Modified
<input checked="" type="checkbox"/>	Bank of America, N.A.	BOA Horse Trailer Consignment	Use this program to submit apps (electronically) and print docs for Horse Trailer collateral on a consignment basis for Bank of America	12345	PO Box 2759 Jacksonville, FL 32203-2759	PO Box 2759 Jacksonville, FL, 32203-2759	Links	param 5/24/2012 2:44 PM
<input checked="" type="checkbox"/>	Bank of America, N.A.	BOA Horse Trailer Indirect	Use this program to submit apps (electronically) and print docs for Horse Trailer collateral for Bank of America	12345	PO Box 2759 Jacksonville, FL 32203-2759	PO Box 2759 Jacksonville, FL, 32203-2759	Links	param 5/24/2012 2:44 PM
<input type="checkbox"/>	Boulevard Bank	Boulevard Trailer Program	Use this program to submit apps (electronically) and print docs for Trailer/HorseTrailer collateral for Boulevard Bank.		12800 Corporate Hill St. Louis, MO, 63131	12800 Corporate Hill St. Louis, MO, 63131	Links	—
<input type="checkbox"/>	Commerce Bank	COMM - TMFS Program	—		P.O. Box 413658 Kansas City, MO, 64141	—	Links	—
<input checked="" type="checkbox"/>	Fort Knox TEST BANK	FortKnox TEST	—	12345	100 ABC st Baton Rouge, La, 70809	100 ABC st Baton Rouge, La, 70809	Links	param 5/24/2012 2:44 PM

- Select the check box in the **Enable** column to enable a lender for the specified 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. If you have subscribed to the AppOne for Dealers, you can add and edit lenders in this 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	dnaquin 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	kmtestrecla 1/31/2014 10:05 AM
<input checked="" type="checkbox"/>	Bank of the Wesel		111 1st St S, Ste 101A Brooklyn, NY, 11211	111 1st St S, Ste 101A Brooklyn, NY, 11211	kmtestrecla 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	kmtestrecla 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	kmtestrecla 2/20/2014 10:12 AM
<input checked="" type="checkbox"/>	Bank of the West		P.O. San Ramon, CA, 94583	P.O. Box 513 Amelia, OH, 45102	dnaquin 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	fcorman 3/3/2014 2:11 PM

Notes

The option to add a non-integrated lender is available only to dealerships that subscribe to AppOne for Dealers. If you do not have the ability to add other lenders, contact Supportline. See AppOne Contacts at the end of this document for contact information.

You will need to [Set Up Form Batches](#) for lenders that you add in the **Other Lenders** section.

- 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** list.
 - Complete the information.
 - Information will automatically display for some lenders.
 - The **State Lien Holder Code** is the code for submitting title 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:

Note

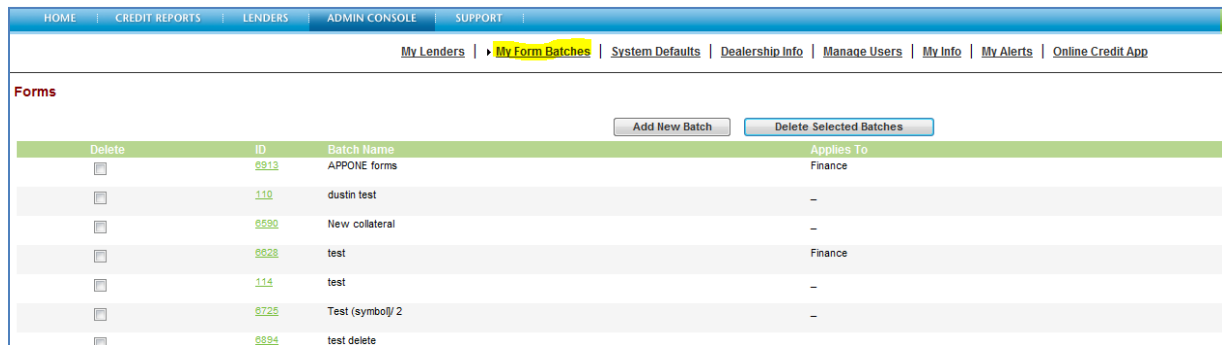
Click **Links** in the **Links** column to access links to helpful lender information.

8. When you are done setting up **AppOne Lenders** and **Other Lenders**, click the **Save** button.
9. Repeat steps 3 through 8 for the remaining dealerships and collateral types.

Set Up Form Batches

If applicable, set up a forms list. The following section applies only to service companies that have paid subscriptions to set up 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			
Add New Batch Delete Selected Batches			
Delete	ID	Batch Name	Applies To
<input type="checkbox"/>	6913	APPONE forms	Finance
<input type="checkbox"/>	110	dustin test	-
<input type="checkbox"/>	6580	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:

Save Cancel

List of Forms:

State: GA Form Type: A+ Federal Credit Union Forms Filter: ALL

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 <<

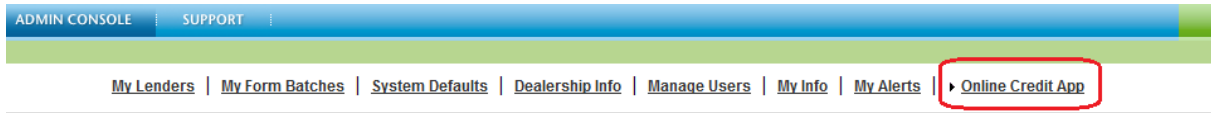
Save Cancel

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)

Make a Blank Credit Application Available Online

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



3. Select the **Dealer** from the drop-down.
4. 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**. A generic disclaimer has been included. Please check with an attorney for the appropriate disclaimer language for your state.
5. Press the **Save** button.

A screenshot of the 'Online Credit App' configuration page. At the top, there's a red header bar with the title 'Online Credit App'. Below it, a dropdown menu for 'Dealer' is set to 'DO NOT TOUCH CL Hanson FL - Jacksonville, FL (#7771)'. A checkbox labeled 'Enable the Online Credit App feature for my dealership' is checked. The 'Unique Website Folder Name' field contains 'test florida', with a hint 'e.g. abcmotors, jakesrvworld etc.' and a URL 'http://external.test.appone.net/OnlineCreditApp/test florida'. The 'Notification Email Addresses' field contains 'kk@email.com; test@email.com' with a hint 'Enter one or more email addresses separated by semi-colons where you want to be notified when a new credit app is submitted by a consumer.'. The 'Website Theme' dropdown is set to '1' with a 'Preview' link. A large text area for the 'Credit App Submission Disclaimer' contains the text: 'I am interested in purchasing or leasing a vehicle from 7771 and hereby authorize 7771 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 ext'. At the bottom right, there is a 'Save' button.

- Copy the hyperlink and have it embedded on the 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 the dealership's web designers so that they can embed it in the appropriate tab and button on the website.

ip

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.

Purchasing or leasing a vehicle from DO NOT TOUCH
I 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

- Repeat steps 3 through 6 for the next dealership until all dealerships are complete.

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 and DMS Interfaces

- Select **Admin Console** on the menu bar.
- Select the **3rd Party Interfaces** link.

ADMIN CONSOLE | SUPPORT

My Lenders | My Form Batches | System Defaults | Dealership Info | Manage Users | My Info | My Alerts | Online Credit App | **3rd Party Interfaces**

- To enable CREDCO for your service company organization:
 - Check the **Enable CREDCO** box.
 - Fill in the **CREDCO Customer ID** and **CREDCO Password** in the **Value** column,

Parameter	Value
CREDCO Customer ID	4006920
CREDCO Password	9QGS4J0Z

4. To enable a DMS interface for a dealer:

- Select a dealer from the **Dealer** list.
- 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	-	<input type="text" value="12345"/>
<input type="checkbox"/>	Supreme Software	-	<input type="text"/>

5. Click the **Save** button.

Create a Financed Deal

A financed deal is any deal that has lienholder, integrated or non-integrated. To create a deal without a specified lender, see [Create a Deal without a Specific Lender](#).

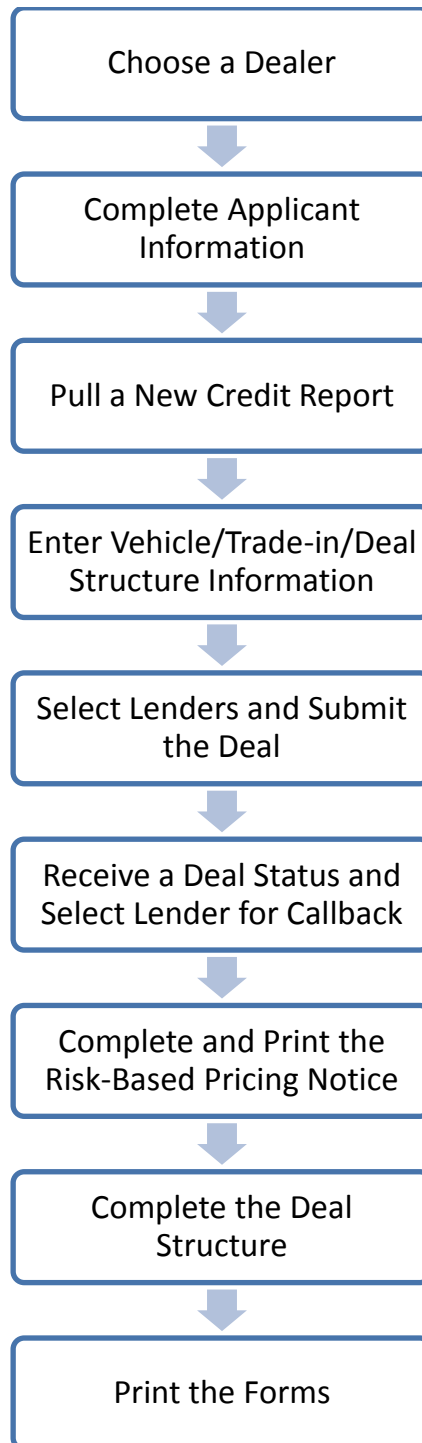
Objectives

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

Tip

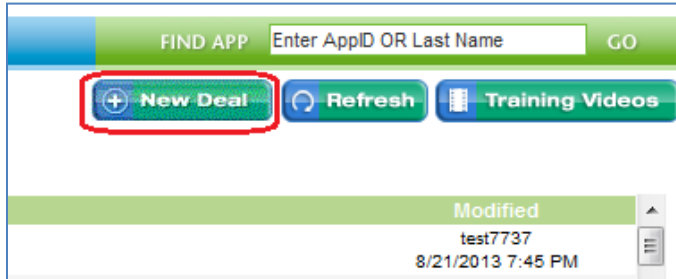
You can track your deals by selecting Deals on the AppOne® homepage.

Deal Workflow



Complete Applicant Information

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



The screenshot shows a web application interface. At the top, there is a green header bar with the text 'FIND APP' and a search input field containing 'Enter AppID OR Last Name' and a 'GO' button. Below the header, there are three buttons: 'New Deal' (highlighted with a red box), 'Refresh', and 'Training Videos'. Below these buttons, there is a green bar with the text 'Modified' and a table showing 'test7737' and '8/21/2013 7:45 PM'.

2. Select a dealership.



The screenshot shows a 'Dealer Information' form. It includes a 'Search Dealer' input field, a 'Location' dropdown menu with 'BWF-CO - MILLVILLE, CO (#18923)' selected, and fields for 'Address 1', 'Address 2', 'City', 'State', 'ZipCode', 'Phone', and 'Fax'. Below the form, there is a section titled 'Lender Programs Available' with the text 'Marine One Acceptance Corp (Marine One Marine Program)' and a 'Select Dealer' button.

- Select the dealership using the **Search Dealer** box or by making a selection from the **Location** drop-down. You can change the dealership later if necessary.
 - When you pick a dealership, the **Lender Programs Available** area shows the lender programs associated with that dealership.
 - When you are done, click the **Select Dealer** button.
3. 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** list.

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

Dealer: DO NOT TOUCH CL Hanson FL - Jacksonville, FL (#7771) Application Type: 1 Individual

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

FName: MATT MI: LName: TESTCO Suffix:
SSN: 749 - 23 - 4872
DOB: 5 / 5 / 1981
Home Phone: 472 - 472 - 4723
Cell Phone: - -
DL No:
Email:

Current Residence Information

Address: #: 1111 Street: 1ST ST S Apt #:
Zip/City/State: 11211 BROOKLYN NY
County: KING S
How Long? 3 years 0 months
Status: own
Rent/Mortgage Pmt: \$0
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: 11211 BROOKLYN NY
Gross Salary: \$4,343 / Monthly
Work Phone: 472 - 472 - 4723
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

Change Dealership Save Proceed To Next Step >>

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Pull a New Credit Report

Note

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

1. Select the credit bureau from the list.

Equifax ▼ ☒ 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.

Equifax ▼ ☒ Pull New Report ☒ Bypass Bureau Errors

MIKE LUND

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](tel:1-800-694-1414) for more information.

RED FLAG COMPLIANCE INFORMATION
 OFAC not activated. Call [1-800-694-1414](tel:1-800-694-1414) for more information

Prepared By: Corelogic Credco
 P.O. BOX 509124
 SAN DIEGO, CA 92150
 Contact: [\(800\)986-4343](tel: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 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: **Serial:** 546389075789 **ORIGINAL MSRP:** \$5,000.00 **Selling Price:** \$6,000.00

First Motor: 0.00 HP INBOARD Fuel: **Second Motor:** 0.00 HP INBOARD Fuel: **Trailer:** 0 Axles

(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

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

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

Change Dealership **Save** **Proceed To Next Step >>**

Collateral Information

Collateral Type: UTV **Inventory Stock Number:**

NADA Book-Out **Reset Vehicle**

Type: New **Year:** 2002 **Make:** POLARIS **Model:** RANGER 6X6 **Body Style:** **ORIGINAL MSRP:** \$9,949.00 **Selling Price:** \$12,500.00

Fuel Type: **Serial Number:** **Mileage:** 0

Bookout Information

	Average Retail	Clean Trade-In/Wholesale	Rough Trade-In/Wholesale
Base:	3,895	1,975	1,515
Accessory:	928	596	0
Final:	4,823	2,571	1,515

Vehicle Accessories

Utility Trailer (Standard) Power Blades/Plow (UTV)

Collateral Options

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

Change Dealership **Save** **Proceed To Next Step >>**

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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:		\$15,000.00
Trade-In Allowance:		\$0.00
Trade-In Payoff:		\$0.00
Sales/Other Tax:	net <input type="button" value="v"/> 10.00000 %	\$1,500.00 <input type="checkbox"/> manual override
Rebate:		\$0.00
Total Cash Down:		\$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.

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.

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

- 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="\$5.00"/>	<input type="checkbox"/> tax
License Fee:	<input type="text" value="\$90.00"/>	<input type="checkbox"/> tax
Registration Fee:	<input type="text" value="\$10.00"/>	<input type="checkbox"/> tax
Inspection Fee:	<input type="text" value="\$300.00"/>	<input type="checkbox"/> tax
Documentation Fee:	<input type="text" value="\$20.00"/>	<input checked="" type="checkbox"/> tax
Notary Fee:	<input type="text" value="\$15.00"/>	<input type="checkbox"/> tax
UCC Filing Fee:	<input type="text" value="\$10.00"/>	<input type="checkbox"/> tax
Total Front-End:	\$65,000.00	

3. Review the Rate & Terms section.

Rate & Terms	
# of Payments:	<input type="text" value="120"/> <input type="button" value="Monthly"/> ▼
Rate:	<input type="text" value="8.50 %"/>
Contract Date:	<input type="text" value="1/5/2015"/>
Days to First Payment:	<input type="text" value="30"/>
First Payment Date:	02/04/2015
Last Payment Date:	01/04/2025

4. If applicable, complete the Trade-In Information.

Trade-In Information							
<input checked="" type="checkbox"/> Trade-In #1 Information							
Serial #:	<input type="text"/>	Year:	<input type="text" value="1999"/>	Make:	<input type="text" value="MAKE"/>	Model:	<input type="text" value="MODEL"/>
Mileage:	<input type="text" value="0"/>	Lien Holder:	<input type="text" value="NAME1"/>	Phone:	<input type="text"/>	Account #:	<input type="text"/>
<input type="checkbox"/> Trade-In #2 Information							

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

<input type="button" value="Proceed To Next Step >>"/>
--

Select Lenders and Submit the Deal

The **Lenders** tab shows all the AppOne and Fax lenders that are available for the selected dealership.

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		-

2. 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

3. 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. The manual print feature may not be available with all lenders.

Receive a Deal Status and Select Lender for Callback

Change Dealership
Add Note
Mark Dead
Submit To Lenders

Lender:	American Credit Acceptance Corp. - R1	M&T Bank
Transmission Status:	COMPLETED	COMPLETED
Lender AppID:	300167466590000	300167466590000
Analyst Name:	MICHAEL HATFIELD	MICHAEL HATFIELD
Analyst Phone:	643-286-5575	643-286-5575
Decision:	PENDING (Tier Tier 3) Send to Dealer	PENDING (Tier Tier 3) Send to Dealer
Expiration Date:	05/09/2015	05/09/2015
Buy Rate:	25.98%	25.98%
Max Rate:	27.98%	27.98%
Max Term:	108 mths	108 mths
Max Advance:	\$621,864.01	\$621,864.01
Max Loan Amount:	\$621,864.01	\$621,864.01
Max Payment:	\$8,899.85	\$8,899.85
Max VSC:	\$7,909.28	\$7,909.28
Max GAP:	\$457.85	\$457.85
Max Back-End:	\$8,367.13	\$8,367.13
Min Cash Down:	\$66,999.08	\$66,999.08
Acq Fee:	\$518.00	\$891.00
Trade Equity:	-	-
Special Stips:		
Submit Notes to Lender:	-	-
Notes:	These are some pipeline queue notes.... PLEASE FAX BILL OF SALE.PLEASE FAX COMPLETED CUSTOMER IDENTIFICATION FORM..	For real-time rehashing, please visit https://dealer.santanderconsumerusa.com . Buy Rate: 10.04% for fee of: \$157.50, plus acq fee: \$0. Total dealer fee: \$157.50. Good to: 90% +++, 60 months. Not eligible for Rate Participation. Call for other options..
SELECT CALLBACK:	-	-

For AppOne lenders, complete the following:

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

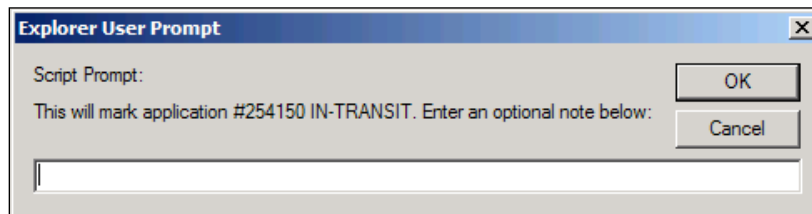
Contract Information

- **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

- 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:
MAX. RATE:
CONTRACT RATE:
TERM: 60
AMOUNT:
NOTES:

- 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:

Reserve Amount:

Comments:

- 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

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** button to print the document.

Note

You can print the score only when the organization is signed up with Credco.

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 browser is Windows Internet Explorer. The page content includes a sidebar on the left with icons for documents, a main content area with a form, and a footer with the page number -102.

The form contains the following fields:

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

The title of the document is **Your Credit Score and the Price You Pay for Credit**. Below the title is the subtitle **Risk-Based Pricing Notice - Exception form for loans not secured by one to four family RE**.

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. Note that the fees vary depending on the dealership's state and the type of collateral.

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

Back-End Products

<input type="checkbox"/> Vehicle Service Contract	\$0.00
<input type="checkbox"/> GAP	\$0.00
<input type="checkbox"/> Credit Life	\$0.00
<input type="checkbox"/> Credit Disability	\$0.00

Back-End Products—No Selection Made

Back-End Products

☒ Vehicle Service Contract \$2,000.00

Company:

Coverage Term: ☐ Unlimited? Mileage: ☐ Unlimited?

Coverage Description:

Deductible:

Dealer Cost: Tax: ☐ Override

<input type="checkbox"/> GAP	\$0.00
<input type="checkbox"/> Credit Life	\$0.00
<input type="checkbox"/> Credit Disability	\$0.00

Back-End Products—Vehicle Service Contract Selected

4. Complete Back-End Product information if applicable.
5. Click the **Save** button when complete.
6. 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. Review the lender information.

LienHolder Information

Name:

State Lien Holder Code:

Address1: Address2:

Zip / City / State:

Phone: Fax:

2. On the **Forms** tab, verify the insurance information.

Insurance (Loss Payee) Information Same as LienHolder Information ☐

Name:

Address1: Address2:

Zip / City / State:

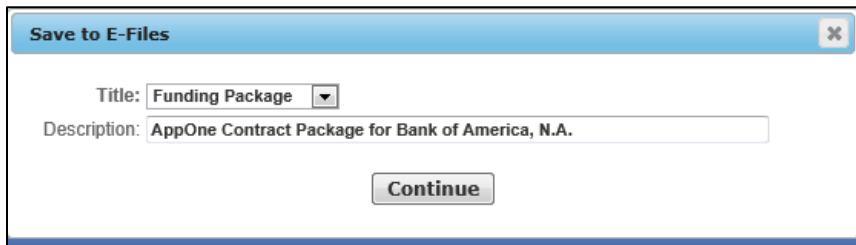
3. For non-integrated lenders only: Select a batch in the **Form Batch** list.
4. To save the forms to the **E-Files** tab, check the **Also Save to E-Files** box. See [Work with Scanned Documents](#) for more information on using the **E-Files** tab.
5. Click the **Print Selected Forms** button to open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



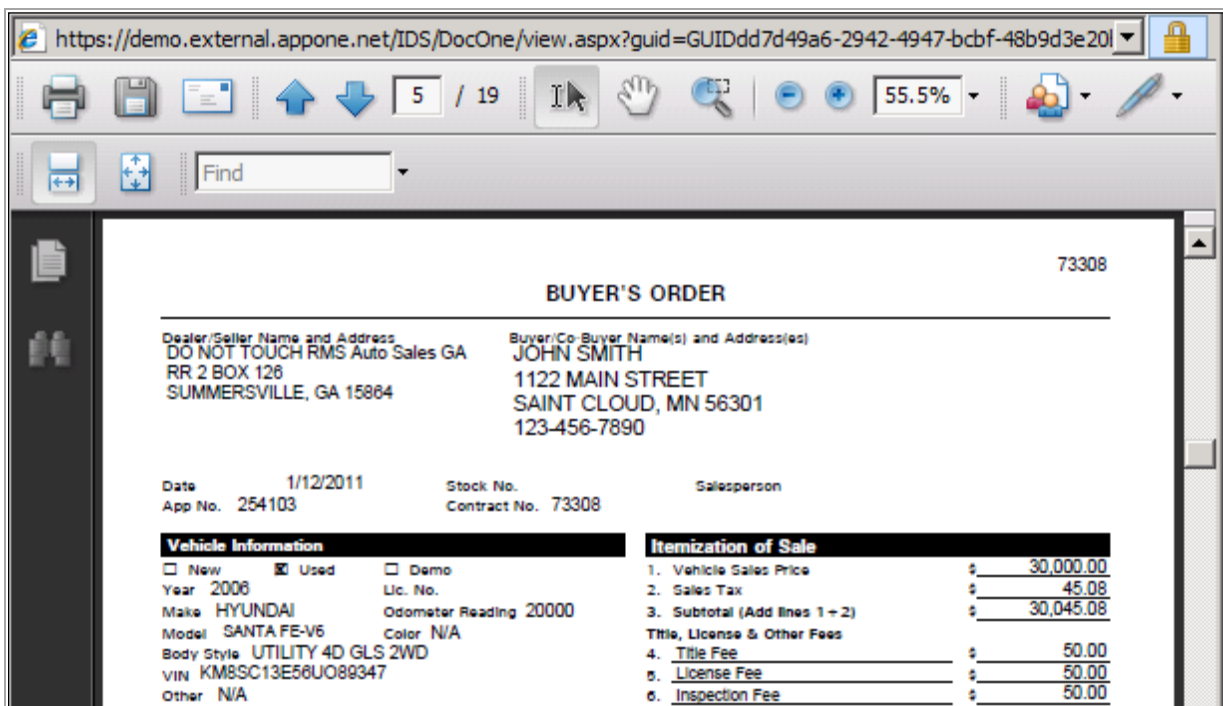
Save to E-Files

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 Stock No. Salesperson
App No. 254103 Contract No. 73308

Vehicle Information		Itemization of Sale	
<input type="checkbox"/> New	<input checked="" type="checkbox"/> Used	1. Vehicle Sales Price	\$ 30,000.00
Year 2008	Lic. No.	2. Sales Tax	\$ 45.08
Make HYUNDAI	Odometer Reading 20000	3. Subtotal (Add lines 1 + 2)	\$ 30,045.08
Model SANTA FE-V6	Color N/A	Title, License & Other Fees	
Body Style UTILITY 4D GLS 2WD		4. Title Fee	\$ 50.00
VIN KM8SC13E56UO89347		5. License Fee	\$ 50.00
Other N/A		6. Inspection Fee	\$ 50.00

7. Close the PDF file after completion.

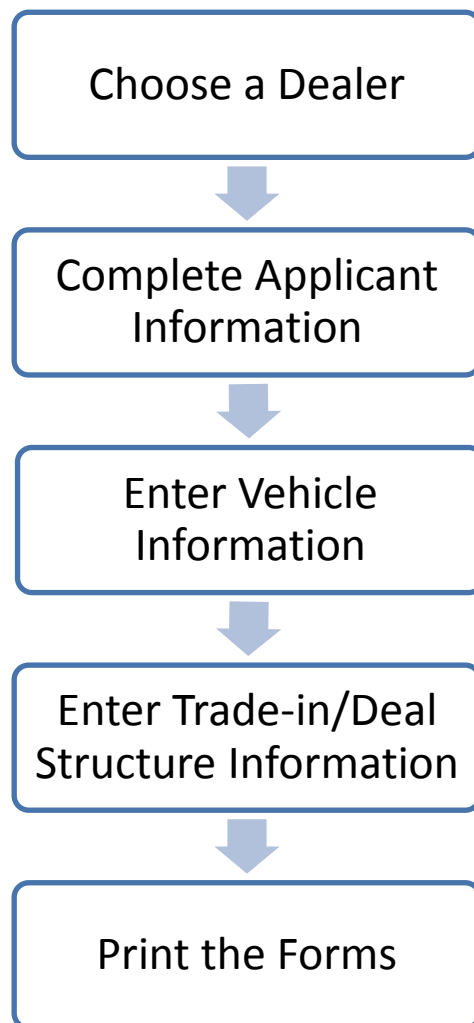
Create a Deal without a Specified Lender

Follow this procedure if you want to print documents without specifying a lender, for example, for a “spot delivery.”

Objectives

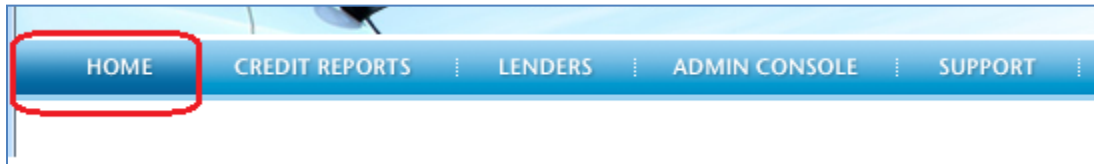
- Review the deal workflow.
- Complete applicant information.
- Enter collateral information
- Enter trade-in/deal structure information.
- Print the forms.

Deal Workflow

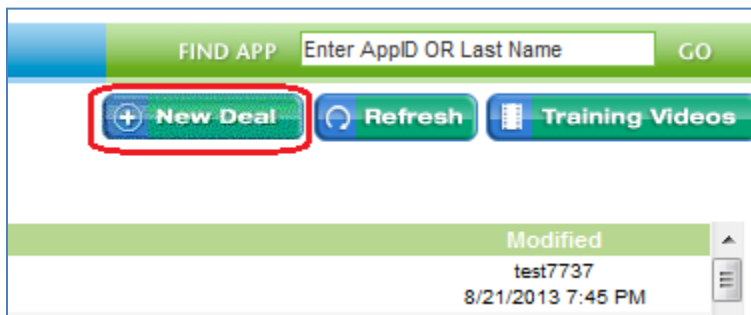


Complete Applicant Information

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



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



3. Complete the information on the **Customer** tab.

A screenshot of the 'Customer' tab in the application interface. The tab is highlighted in green. Below the tab, there are several input fields for personal information, including 'FName', 'MName', 'LName', 'SSN', 'DOB', 'Home Phone', 'Cell Phone', 'DL No', and 'Email'. There are also input fields for 'Current Residence Information', including 'Address #', 'Street', 'Apt #', 'Zip/City/State', 'County', 'How Long?', 'Status', and 'Rent/Mortgage Pmt'. The 'Application Type' is set to '1 Individual'. A 'Save' button and a 'Proceed To Next Step >>' button are visible at the top right of the form.

4. Click the **Save** button when complete.

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 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.

The screenshot shows the 'Collateral Information' section of a web form. The 'Collateral Type' is set to 'Marine'. Below this is the 'Boat Information' section. It contains several fields and checkboxes. The 'Boat' checkbox is checked. The 'Type' dropdown is set to 'Used', and the 'Year' dropdown is set to '2012'. The 'Make' field is 'Honda' and the 'Model' field is 'Honda V2'. The 'Boat Length' field is empty. The 'Serial' field is '546389075789'. The 'ORIGINAL MSRP' is '\$5,000.00' and the 'Selling Price' is '\$6,000.00'. There are also fields for 'First Motor' and 'Second Motor', each with a 'Type' dropdown, 'Year' dropdown, 'Make' field, 'Model' field, 'Boat Length' field, 'Serial' field, 'ORIGINAL MSRP', and 'Selling Price'. The 'First Motor' fields are all empty. The 'Second Motor' fields are all empty. There is also a 'Trailer' checkbox which is not checked. The 'Inventory Stock Number' field is empty. At the bottom, there are two small text labels: '(Add applicable Rigging Fees here)' and '(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

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

The screenshot shows the 'Collateral Information' section of a web form. The 'Collateral Type' is set to 'UTV'. Below this are buttons for 'NADA Book-Out' and 'Reset Vehicle'. The 'Type' dropdown is set to 'New', the 'Year' dropdown is set to '2002', the 'Make' field is 'POLARIS', and the 'Model' field is 'RANGER 6X6'. The 'ORIGINAL MSRP' is '\$9,949.00' and the 'Selling Price' is '\$12,500.00'. The 'Fuel Type' dropdown is set to 'Gasoline'. The 'Serial Number' field is empty. The 'Mileage' field is '0'. The 'Inventory Stock Number' field is empty. To the right, there is a 'Bookout Information' table with columns for 'Base', 'Accessory', 'Final', 'Average Retail', 'Clean Trade-In/Wholesale', and 'Rough Trade-In/Wholesale'. The values are: Base: 3,695, Accessory: 926, Final: 4,623, Average Retail: 1,975, Clean Trade-In/Wholesale: 596, Rough Trade-In/Wholesale: 1,515. Below this is a 'Vehicle Accessories' section with a table for 'Utility Trailer (Standard)' and 'Power Blades/Plow (UTV)'. The 'Utility Trailer (Standard)' table has columns for 'Option Name', 'Cost Price', and 'Selling Price'. The values are: Option Name: 'Utility Trailer (Standard)', Cost Price: '\$0.00', Selling Price: '\$0.00'. There is an 'Add Option' button. The 'Power Blades/Plow (UTV)' table is empty. At the bottom, there are buttons for 'Change Dealership', 'Save', and 'Proceed To Next Step >>'. The footer contains copyright information: '© 2003-2015 Wolters Kluwer Financial Services, Inc. All rights reserved.', 'Tech Support: 8 001-444-0000 FREE', and 'Make Home Page | System Requirements | Terms Of Use | Privacy and Cookies'.

For All Collateral

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

Enter Trade-in/Structure Information

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

App ID: 37457 Customer Name: TEST CREDIT						
Customer	Credit Bureau	Collateral	Structure	Lenders	Forms	Notes
<div>Save Proceed To Next Step >></div>						
Total Amount Financed: \$11,403.25 Total Sales Tax Amount: \$1,313.25 Monthly Payment: \$116.13						
Front-End Itemization				Back-End Products		
Selling Price: \$15,450.00				<input type="checkbox"/> Vehicle Service Contract		
Trade-In Allowance: \$2,500.00				<input type="checkbox"/> GAP		
Trade-In Payoff: \$1,000.00				<input type="checkbox"/> Credit Life		
Gross Sales Tax: 8.50000 % \$1,313.25 <input type="checkbox"/> manual override				<input type="checkbox"/> Credit Disability		
Trade-In Sales Tax Credit: \$500.00						
Rebate: \$0.00						
Cash Down: \$3,500.00						
Net Purchase: \$11,263.25						
Public Officials & Fees						
Title Fee: \$5.00 <input type="checkbox"/> tax						
License Fee: \$90.00 <input type="checkbox"/> tax						
Registration Fee: \$10.00 <input type="checkbox"/> tax						
Inspection Fee: \$10.00 <input type="checkbox"/> tax						

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

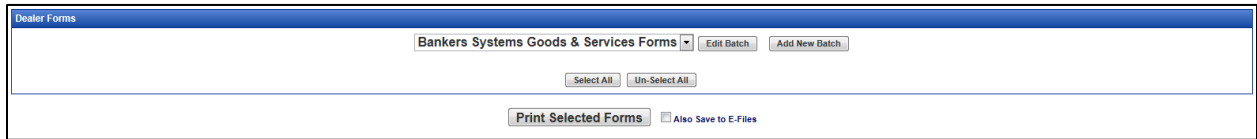
Trade-In Information			
<input checked="" type="checkbox"/> Trade-In #1 Information			
Serial #: <input type="text"/>	Year: <input type="text" value="1999"/>	Make: <input type="text" value="MAKE"/>	Model: <input type="text" value="MODEL"/>
Mileage: <input type="text" value="0"/>	Lien Holder: <input type="text" value="NAME1"/>	Phone: <input type="text"/>	Account #: <input type="text"/>
<input type="checkbox"/> Trade-In #2 Information			

3. Click the **Save** button when information is verified and complete.

Print Forms

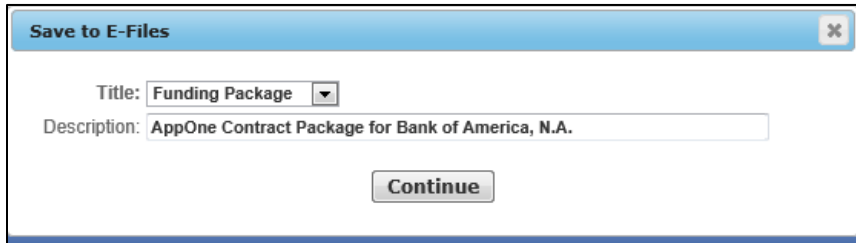
1. Select the **Forms** tab.

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



The screenshot shows the 'Dealer Forms' section of a software interface. At the top, there is a blue header bar with the text 'Dealer Forms'. Below this, there is a white area containing a dropdown menu set to 'Bankers Systems Goods & Services Forms', followed by 'Edit Batch' and 'Add New Batch' buttons. Below these are 'Select All' and 'Un-Select All' buttons. At the bottom of the white area, there is a 'Print Selected Forms' button and a checkbox labeled 'Also Save to E-Files'.

3. 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** feature.
4. Click the **Print Selected Forms** button.
5. If **Also Save to E-Files** is checked, a Save to E-Files pop-up opens. Select a **Title** and enter a **Description**, then click the **Continue** button.



The screenshot shows a 'Save to E-Files' pop-up window. It has a blue header bar with the text 'Save to E-Files' and a close button (X). Below the header, there is a 'Title:' label followed by a dropdown menu showing 'Funding Package'. Below that is a 'Description:' label followed by a text input field containing 'AppOne Contract Package for Bank of America, N.A.'. At the bottom center, there is a 'Continue' button.

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 documents.
- Change a dealership on a deal
- 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. To filter by dealership, select a dealership from the **Filter** list.

Problem Deals (1) Active Deals (20) Contracts In Transit (2) Declined/Dead (0) Funded (1)						
* To find an individual dealer, please use the 'Find App' tool on the top right of your screen.						
#	Dealer Name	Customer	Collateral	Amount	Lenders	
45271	DO NOT TOUCH CL Hanson WY	TSET APP1		\$0.00	INCOMPLETE	

4. Click the underlined **ID#** link to open the deal.

Tabs

You can access deals filtered by the following tabs:

- Problem Deals
- Active Deals
- Contracts in Transit
- Funded Pending Registration

- Decline/Dead
- Funded

HOME CREDIT REPORTS LENDERS ADMIN CONSOLE SUPPORT				
Active Deals (235) Contracts In Transit (10) Declined/Dead (3) Funded (10)				
#	Customer	Collateral	Amount	Lenders
37406	TEST CREDIT2	2009 MAKE MODEL	\$12,265.00	BOA-H
37457	TEST CREDIT	2007 MAKE MODEL	\$11,903.25	INCOMPLETE
37368	TEST TESTER	2007 MAKE MODEL	\$16,095.00	INCOMPLETE
37315	BERRY UNDERMEN	2009 MAKE MODEL	\$12,146.50	JERCO-DEF
37314	MIKE LUND	2010 MAKE MODEL	\$12,595.00	BOA-RC
37172	UDAY HUSSEIN		\$0.00	INCOMPLETE
37158	Brian Bankrupt	2012 polaris commander	\$10,000.00	MBE
37156	SADDAM HUSSEIN		\$140.00	INCOMPLETE
37142	reve test robishon		\$0.00	INCOMPLETE

View AppOne Announcements

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



Click an individual announcement for more information.

HOME CREDIT REPORTS ADMIN CONSOLE SUPPORT ANNOUNCEMENTS (2)				
2012 Portal Migration System Downtime Notification IMPORTANT NOTICE FROM APPONE				
Posted Date	Title			
6/5/2013				
3/22/2012				
7/20/2007				

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.

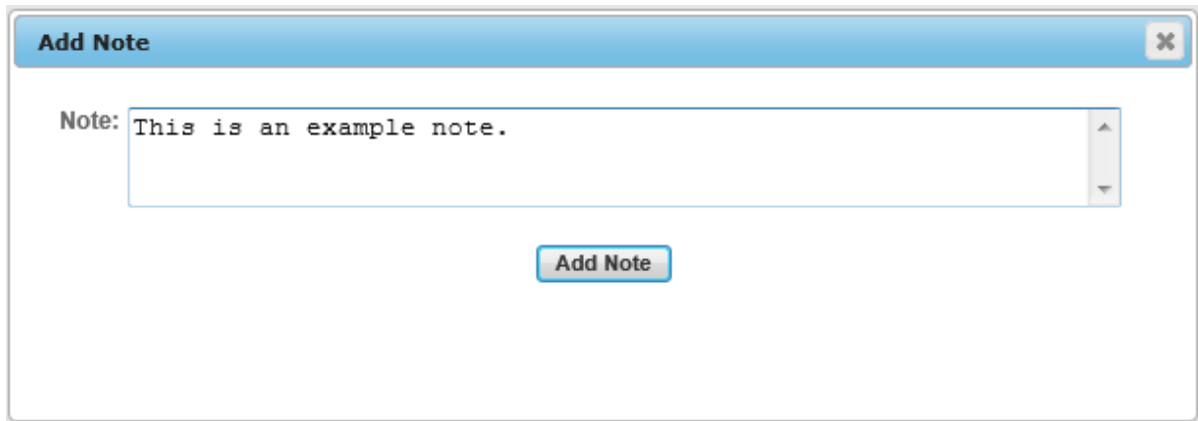
FIND APP	GO
Smith	
Status	Modified
PENDING	fcoleman 7/26/2013 10:51 AM

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.

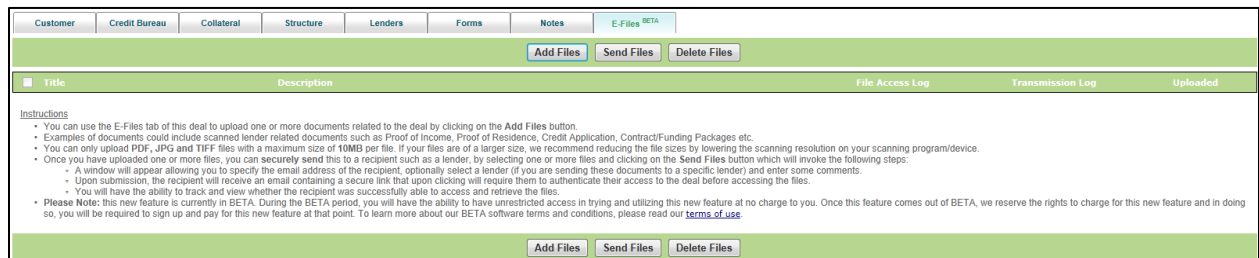


Work with Scanned Documents

Use the **E-Files** tab to attach, send, or delete scanned document files. 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.

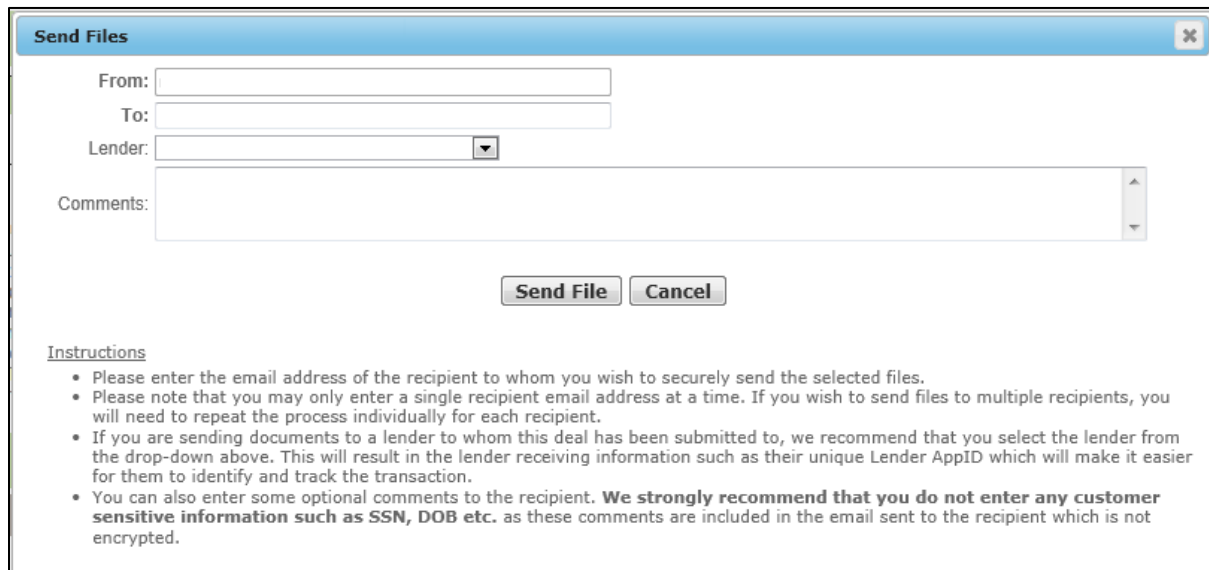
<input type="button" value="Add Files"/> <input type="button" value="Send Files"/> <input type="button" value="Delete Files"/>			
<input checked="" type="checkbox"/> Title	Description	File Access Log	Transmission Log
<input checked="" type="checkbox"/> Driver's License		View Log	View Log

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 image shows a 'Send Files' pop-up window. It has a title bar with the text 'Send Files' and a close button. Inside the window, there are four input fields: 'From:' (pre-filled), 'To:', 'Lender:' (a dropdown menu), and 'Comments:' (a text area). Below these fields are two buttons: 'Send File' and 'Cancel'. At the bottom of the window, there is an 'Instructions' section with a list of bullet points.

Send Files

From:

To:

Lender:

Comments:

Send File **Cancel**

Instructions

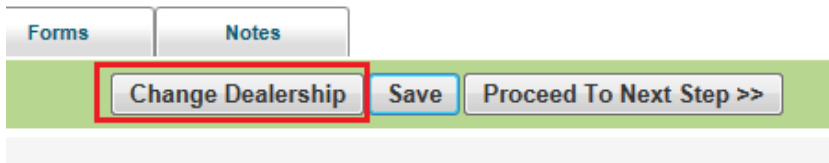
- Please enter the email address of the recipient to whom you wish to securely send the selected files.
- Please note that you may only enter a single recipient email address at a time. If you wish to send files to multiple recipients, you will need to repeat the process individually for each recipient.
- 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.

Change the Dealership on a Deal

From the **Customer**, **Credit Bureau**, **Collateral**, or **Structure** tab:

1. Click the **Change Dealership** button.



The image shows a section of a web interface with two tabs: 'Forms' and 'Notes'. Below the tabs is a green bar containing three buttons: 'Change Dealership', 'Save', and 'Proceed To Next Step >>'. The 'Change Dealership' button is highlighted with a red rectangular border.

Forms **Notes**

Change Dealership **Save** **Proceed To Next Step >>**

2. Select another dealership using the **Search Dealer** box or by making a selection from the **Location** list.

Dealer Information

Search Dealer :

Location : **DO NOT TOUCH CL Hanson WY - Some City, WY (#7715)** ▼

Address 1: 123 Main Street Address 2:

City: Some City State: WY ZipCode: 70806

Phone: 225-123-4567 Fax: 225-123-4568

Notes:

3. Click the **Save** button.

Add a User

1. Select **Admin Console** on the Menu bar.
2. Select **Manage Users**.
3. Click the **Add User** button.

Manage Users

Delete	Username
<input type="radio"/>	amytestla
<input type="radio"/>	dustiniwpla

4. Complete the information.

Add/Edit User

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. 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

Use the **My Alerts** page to set up emailed or texted alerts. AppOne will send an alert when one of these events occurs:

- The status of an application changes.

- The status of a lender callback changes.
- A new loan application is submitted.

To set up 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 Alerts			
Alert Name	Description	Recipient Addresses	Modified
App Status Change	Application Status Change	<input type="text" value="test2@email.com"/>	kmtestch 1/29/2014 4:11 PM
Lender Callback Status Change	Lender Callback Status Change	<input type="text" value="test1@test.com"/>	kmtestch 1/28/2014 12:34 PM
New Loan Application Submitted	New Loan Application Submitted	<input type="text"/>	kmtestch 1/24/2014 3:29 PM

Note

Only users with administrative rights can set up 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 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 that receives applications electronically through the RouteOne interface. A fax lender is a lender that receives credit applications 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 dealerships 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.

#	Dealer Name
 45271	DO NOT TOUCH CL Hanson WY
 45281	DO NOT TOUCH CL Hanson FL

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	
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:	-

Click the **Decision** link (such as **APPROVED**) to find more information about the decision or to display a printable copy.

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	<input type="text" value="Smith"/>	GO
Status	Modified	
PENDING	foleman 7/26/2013 10:51 AM	

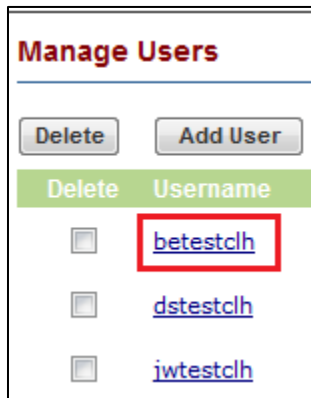
2. Click the underlined **ID#** link to open the application.

#	Customer
 36560	JACK SMITH
 35388	ABLE SMITH

How do I unlock an account or reset a password?

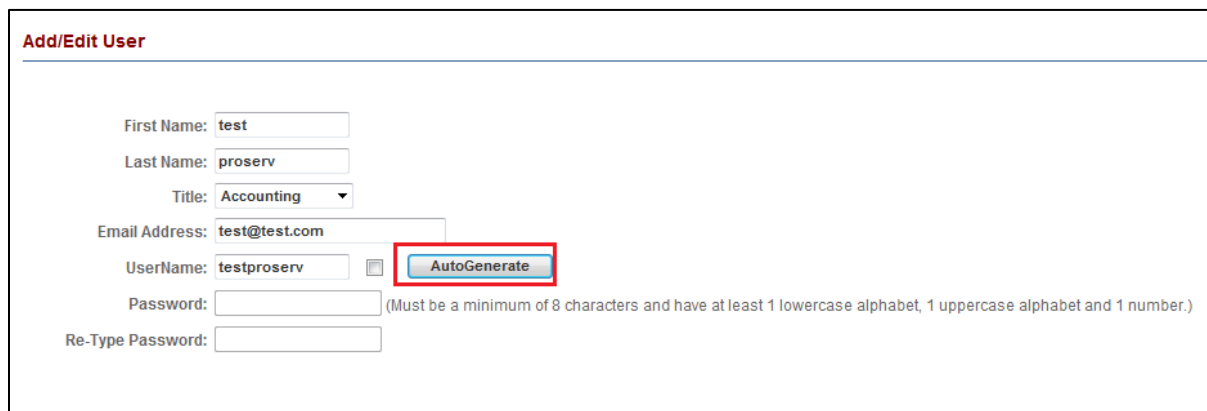
Any user with administrative rights can unlock an account or reset a forgotten password for someone in their organization.

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



The screenshot shows the 'Manage Users' interface. At the top, there are 'Delete' and 'Add User' buttons. Below them is a table with two columns: 'Delete' and 'Username'. The 'Username' column is highlighted with a red box. The table contains three rows of user accounts: 'betestclh', 'dstestclh', and 'jwtestclh'. Each row has a checkbox in the 'Delete' column.

4. In the **Add/Edit User** window, click the **AutoGenerate** button or enter a new password in the **Password** and **Re-Type Password** fields. Changing the password also unlocks the account.



The screenshot shows the 'Add/Edit User' form. It contains several input fields: 'First Name' (test), 'Last Name' (proserv), 'Title' (Accounting), 'Email Address' (test@test.com), 'UserName' (testproserv), 'Password', and 'Re-Type Password'. The 'AutoGenerate' button is highlighted with a red box. A note next to the password fields states: '(Must be a minimum of 8 characters and have at least 1 lowercase alphabet, 1 uppercase alphabet and 1 number.)'

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 **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 Numbers

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

My SAP Customer #

Billing

800-552-9410 x1123113

CustomerSupportAppOne@wolterskluwer.com

Product Information & Sales/Business Manager

Tyler Kelly

877-277-6631, extension 1207947

Tyler.Kelly@wolterskluwer.com

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