

Dealer Portal and SourceOne

Quick Guide

October 2015

Preface

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Introducing the New Dealer Portal

Welcome to the new AppOne dealer portal. To log in, go to <https://gateway.appone.net/dealer/>.

The enhanced portal provides a new layout with the same features and functions you expect from AppOne. The tabbed format will improve your efficiency and allow you to find information quickly.

New and Enhanced Features

- New tabs, same information. AppOne's new portal lets you enter customer, collateral, and structure information in separate tabs. If you need to check the collateral or the structure, you can go easily to that section. You enter the same information; AppOne keeps it where you can find it.



AppOne Portal
Wolters Kluwer Financial Services | appone

Dealer Support: 877-277-6631
Welcome Back Rosalind (DO NOT TOUCH RMS AUTO SALES LA Lot ID#: 7358)
SAP Customer #: Test
Quick Guide | Logout

HOME CREDIT REPORTS LENDERS VENDORS ADMIN CONSOLE SUPPORT ANNOUNCEMENTS

App ID: 1306729 Customer Name: ROBERT TESTCO

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

Save Proceed To Next Step >>

☐ Cash Deal Application Type: 1 Individual

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

FName: ROBERT MI: LName: TESTCO Suffix:
SSN: 437-85-3465
DOB: 05/05/1975
Home Phone: 562-344-5635
Cell Phone:
DL No:
Email:
Current Residence Information
Address: # 123 Street: OAK ST Apt #:
Zip/City/State: 56387 WAITE PARK MN
County: STEARNS
How Long? 4 years 0 months

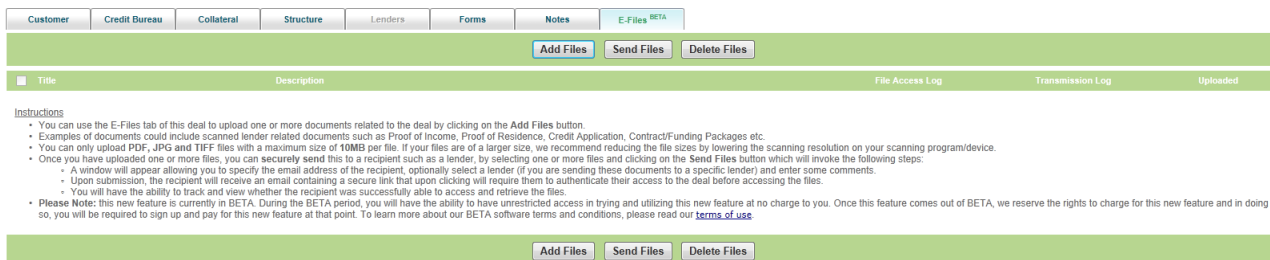
- You have two ways to clone an application:
 - From the **Customer**, **Credit Bureau**, **Collateral**, **Structure**, or **Lender** tab, by clicking the **Clone Application** tab.

Clone Application

- From the Home page by clicking the clone icon to the left of the application ID.

Active Deals (291)		Contracts In Transit (4)	
#	Customer		
1300081	BILL BORROWER		
1300070	RICKY TESTCO		
1300054	Mike Testco		

- Upload slips or other files, such as proof of income or a driver's license, on the **E-Files** tab—easily send required information to SourceOne.



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](#).

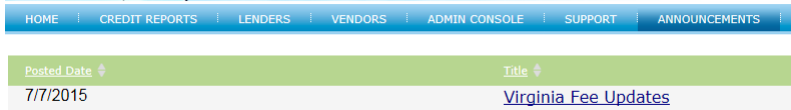
- Specify boats, outboard motors, and trailers separately on the **Collateral** tab (that is, enter only a motor or only a trailer without entering a boat.)
- Copy applicant information with the click of a button, saving you keystrokes.



Application Type: **2 Individuals**

Copy Applicant #1 Info to **Applicant #2** **Go** Swap **Applicant #1 & #2** **Go**

- View announcements from AppOne—stay informed and up-to-date.



HOME | CREDIT REPORTS | LENDERS | VENDORS | ADMIN CONSOLE | SUPPORT | ANNOUNCEMENTS

Posted Date	Title
7/7/2015	Virginia Fee Updates

- Access complete help information from the **Support** tab—get answers for all your questions and how-to information you need.
- As always, AppOne is the only system that provides you with a set of documents that are already approved by SourceOne.

Create a Deal

- On the **Home** tab, click the **New Deal** button.

Customer tab

- A complete social security number (**SSN** field) is required for individual applicants. You cannot enter a taxpayer ID or Employer ID Number (EIN) in place of a social security number when entering customer information for individual applicants.
- Enter personal, residence, and employment information for the buyer or buyers.
- Fields with blue, bold titles are required.
- Select joint borrowers, cosigners, or guarantors in the **Application Type** list.
- When information on the **Customer** tab is complete, click the **Proceed to Next Step** button.



Note:

The **Customer** tab includes a **Cash Deal** box. As a SourceOne dealer, you do not need to use this box.

Credit Bureau tab

- Pull and print credit reports.
- You must be signed up with Credco to use this feature.
- When you are done on the **Credit Bureau** tab, click the **Proceed to Next Step** button.

Collateral tab

- A **VIN** or **Serial Number** is required for printing documents.
- Verify or fill in information for your collateral. Note that you can now specify boats, outboard motors, and trailers separately.
- For a utility, flat bed, or horse trailer, select **Trailers**.
- When you are done on the **Collateral** tab, click the **Proceed to Next Step** button.

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

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

Collateral Information

Collateral Type: Marine Includes power boats, sail boats, outboard motors & boat trailers. Inventory Stock Number: 123456789

Boat Information

	<input type="checkbox"/> Boat	<input checked="" type="checkbox"/> First Motor	<input type="checkbox"/> Second Motor	<input checked="" type="checkbox"/> Trailer
Type:				New
Year:				
Make:				
Model:				
Boat Length:		0.00 HP Fuel	0.00 HP Fuel	0 Axles
Serial:				
Dealer Cost/Invoice:	\$0.00	\$0.00	\$0.00	\$0.00
MSRP:	\$0.00	\$0.00	\$0.00	\$0.00
Selling Price:	\$0.00	\$0.00	\$0.00	\$0.00

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

Boat Accessories

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

[Add Option](#)



Note:

On cloned applications, the **Collateral** tab includes a **Save & Print Forms** button. Do not use this button for SourceOne applications.

Structure tab

- Verify or enter information in the **Front-End Itemization**, **Fees**, and **Rate and Term** sections. Enter **Trade-in Information** if any.
- When you are done on the **Structure** tab, click the **Submit Application** button.
- When you are done submitting the deal, you may come back to the **Structure** tab to confirm the structure.



Note:

No SourceOne lender allows a deferred downpayment.

Lenders tab

- Click the **Refresh** button to check if the decision was returned.
- Click the **Select/Print** button to print.



Note:

You can add a note when you submit a deal by clicking the **Add Note** button.

Forms tab

- Enter insurance information.
- Click the **Print Selected Forms** button to open a PDF with all the forms.

Notes tab

- You can add a note to the deal at any time by going to the **Notes** tab.

E-Files tab

- Attach scanned document files, such as proof of income or credit applications, to the deal.
- Send the attached files by secure mail to SourceOne.

Customer	Credit Bureau	Collateral	Structure	Lenders	Forms	Notes	E-Files <small>BETA</small>
<div> Add Files Send Files Delete Files </div>							
Title	Description	File Access Log		Transmission Log		Uploaded	
<p>Instructions</p> <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> 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 							
<div> Add Files Send Files Delete Files </div>							

For More Information

If you have any questions or need more information, contact SourceOne at 1-800-709-5626.

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