

AppOne®

**Online Dealer Sign-Up
Quick-Start Training Guide**

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Lender Instructions

You must send the dealer a **LenderDealerID** (the dealer's ID number for your lender program) before the dealer can be set up with your lending program.

Note

Set up the appropriate program associated with the dealer's collateral type. Without the right collateral, the dealer will not see the right program and will not get set up correctly.

Dealer Instructions

Before you start

You will need to have this information ready before you start:

- The dealer ID number from your lender.
- Information about your lot, including your federal tax identifier and your dealer license number.

Signing in

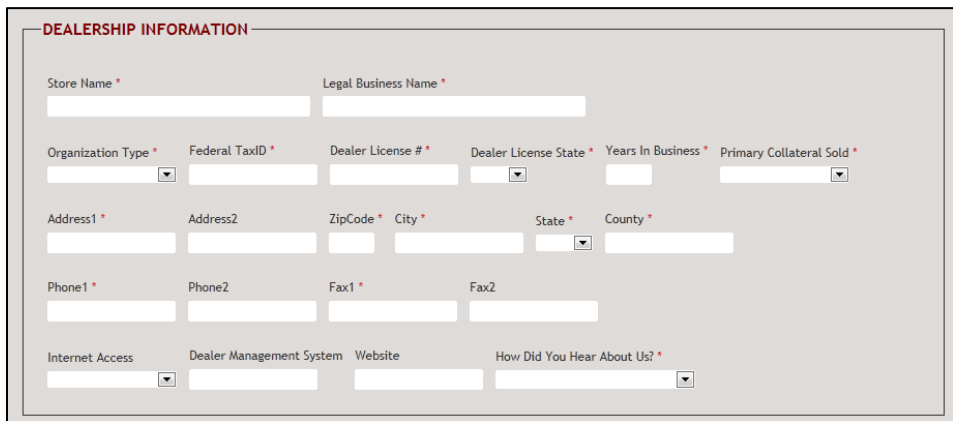
Navigate to <http://www.appone.net/OnlineSignup/Signup>. AppOne recommends you use Internet Explorer, Microsoft Edge, Google Chrome, or Netscape Firefox. Apple computers such as the iMac or MacBook, tablets including the iPad, and smart phones of any kind are not supported by AppOne.

In the Welcome screen:

1. Make sure **I am a Dealership** is selected.
2. Check the box to certify that you have the authority and approval to enter the dealership into legally-binding agreements.
3. Click **Proceed**.

In the Information screen

1. Fill in the **Dealership Information**. Fields with a red asterisk (*) are required.



The screenshot shows a web form titled "DEALERSHIP INFORMATION" with a red border. The form contains several input fields and dropdown menus, all marked with a red asterisk (*) to indicate they are required. The fields are organized as follows:

- Store Name * and Legal Business Name * (text input)
- Organization Type * (dropdown), Federal TaxID * (text input), Dealer License # * (text input), Dealer License State * (dropdown), Years In Business * (text input), and Primary Collateral Sold * (dropdown).
- Address1 * (text input), Address2 (text input), ZipCode * (text input), City * (text input), State * (dropdown), and County * (text input).
- Phone1 * (text input), Phone2 (text input), Fax1 * (text input), and Fax2 (text input).
- Internet Access (dropdown), Dealer Management System (text input), Website (text input), and How Did You Hear About Us? * (dropdown).

E

2. Fill in the User Information. Fields with a red asterisk (*) are required.

Note:

AppOne will send you an email confirming your username and password. Make sure you keep track of the username and password, as you will need them to use the portal

The screenshot shows a web form titled "USER INFORMATION". It contains several input fields: "First Name *", "Last Name *", "Email Address *", "Title *" (a dropdown menu), "Mobile Phone *", "Desired Username *", "Desired Password *", "Re-Type Desired Password *", "Security Question *" (a dropdown menu), and "Security Answer *". Below these fields is a note: "Passwords must be a minimum of 8 characters and have at least 1 lowercase letter, 1 uppercase letter and 1 number." Underneath the form is a section titled "Terms of Use:" which includes an "INTRODUCTION" and an "Acceptance of Terms:" section. The acceptance text states that by accessing the site, the user agrees to the terms and conditions. There is a link "Print Terms of Use" and a checkbox with the text: "I hereby certify that I am the Owner Principal OR General Manager of this dealership and have the necessary authority and approval to enter this dealership into legally binding Agreements with Wolters Kluwer Financial Services, Inc. I further certify that I have read and accept the terms and conditions of the agreement above on behalf of my dealership." At the bottom left of the form is a blue button labeled "PROCEED".

3. Check the box to certify you have the authority and approval to enter the dealership into legally binding agreements.
4. Click **Proceed**.

Enter system defaults

On the System Defaults page:

1. Set default values for taxes and fees. These will be calculated automatically for your applications.
2. Complete back-end product information.
3. Click **Save**.
4. When you are done setting up defaults and back-end products, click **Proceed to Next Step** at the bottom of the page.

Set up lenders

We have noticed that you don't have any lenders setup for your dealership. You will not be able to submit any applications and print docs until you have your lenders setup. Please take a moment to add one or more lenders for your dealership

AppOne Lenders

Collateral Type: All

Enable	Lender Name	Program Name	Description	LenderDealerID	Lienholder Address	Insurance Address	Links	Modified
<input type="checkbox"/>	M&T Bank	M&T Bank	-		P.O. Box 37258 Baltimore, MD, 21297	PO Box 5000 Springfield, OH, 45501-5000	Links	-

Other Lenders

The selected dealer does not have any lender programs setup.

You do not have access to setup and print documents for your other lenders. To sign up for this option, [click here](#) to download and complete the Subscription Form to enable this access.

In the AppOne Lenders section:

1. Check the box in the **Enable** column to enable a lender for your dealership. A pop-up opens offering three options:
 - If the lender has sent you a dealer ID number, enter the dealer ID and click **Save**.
 - If you have an agreement with the lender but do not have a dealer ID for that lender, click the link for the second option. AppOne gets a dealer ID from the lender, validates it, and sends it to your dealership.
 - If you do not have an agreement with the lender but want more information, click the link for the third option. Enter your contact information in the dialog and click **Submit**. AppOne sends your contact information to the lender with a request for information.
2. Click **Save**.
3. If you work with this lender for more than one collateral type, choose the next collateral type from the **Collateral Type** list and repeat steps 1 through 4 for the new collateral type.

Collateral Type: Marine

In the Other Lenders section (optional)

To print documents for lenders that are not part of the AppOne platform, enroll in our free 30-day trial.

1. Click **Activate Free 30-Day Trial**.
2. To add a lender:
 - a. Click **Add Other Lender**.
 - b. Fill in the lender, lienholder, and insurance information.
 - c. Click **Save** in the information popup.

3. Click **Save** in the **My Lenders** page. Wait a moment for the page to refresh after saving.
4. To permanently purchase a subscription, click the **click here** link.

When you are done setting up lenders

Click **Proceed to Next Step**.

Set up users

In the **Manage Users** page, click **Add User** to set up a new user. Fill in necessary user information in the **Add/Edit User** popup, and click **Save** when you are done.

Note:

A user must have administrative rights to set up a new user or perform other tasks on the **Admin Console**. To set up a user with administrative rights, select **Yes** from the **Admin** list.

When you are done adding users, you are ready to use the AppOne portal. You can also enable alerts and set up the online credit application at this point.

After signing up

After you have signed up, AppOne will send you a confirmation of your username and password. Make sure you keep a record of these.

After you log out, add the AppOne login page to your **Favorites** list (Internet Explorer) or **Bookmarks** list (Firefox) so you have it for future reference

Get more information

- For more information on AppOne, check the **Support** tab on the portal.
- For general support:
 - 877-277-6631—support for Risk Mitigation Services (RMS) dealerships (Auto only)
 - 877-404-6788— Dealer Portal SupportLine, for non-RMS dealerships.
 - support@appone.net—support for all AppOne users.
- Contact your business development manager (BDM):
 - Non-RMS dealerships: Tyler Kelly, 877-277-6631, extension 1207947, Tyler.Kelly@wolterskluwer.com
 - RMS Auto Dealerships: 1-877 -277- 6631, Option 4, or call your BDM directly at the extension listed below.

State	BDM	Email
AZ CA CO KS NV TX	Chad Schaefer, Ext. 1207771	chad.schaefer@wolterskluwer.com
FL IL IN MI MO OH	Nate (Robert) Veldman, Ext. 1207784	nate.veldman@wolterskluwer.com
AK GA IA ID LA MN MS MT ND NE NM OR SC SD TN UT VA VT WA WI WY	Mike Riley, Ext. 1207931	michael.riley@wolterskluwer.com
AL AR CT DE KY MA MD ME NC NH NJ NY OK PA RI WV	Kristopher Tovsen, Ext. 1207796	kristopher.tovsen@wolterskluwer.co

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