

# Dealer Portal for Auto

## Quick Guide

July 2015



## Preface

This publication was written for AppOne

### **Publication Information / Version**

Document Title: Dealer Portal for Auto

Release Date: July 2015

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# Introducing the New Dealer Portal

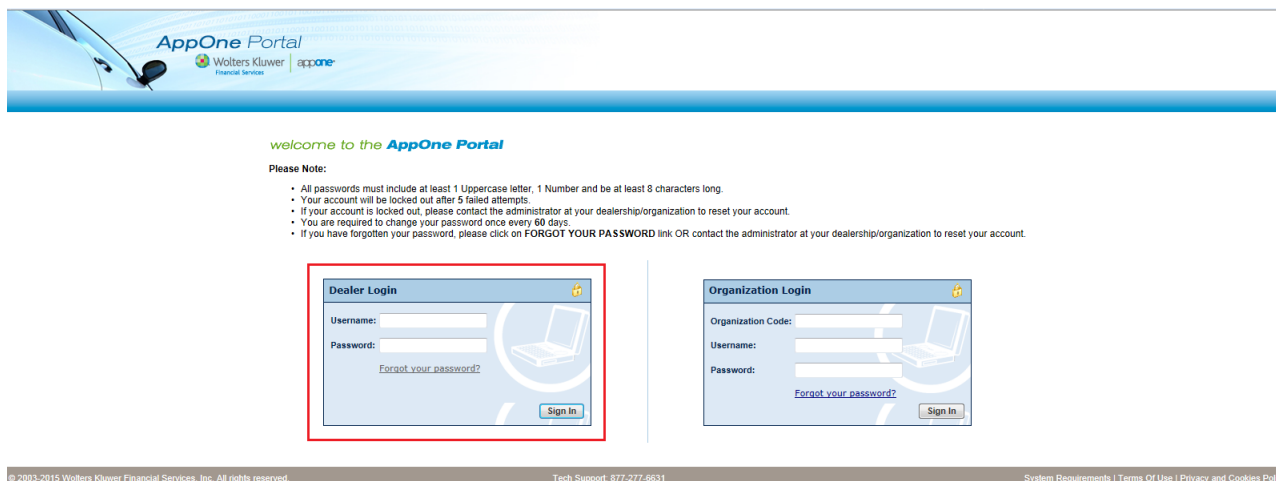
Welcome to the new AppOne dealer portal. To log in, go to <https://gateway.appone.net/dealer/>.

## Dealer Login

To log in as a dealer, enter your **Username** and **Password** on the **left** side in the **Dealer Login** area.

### Note:

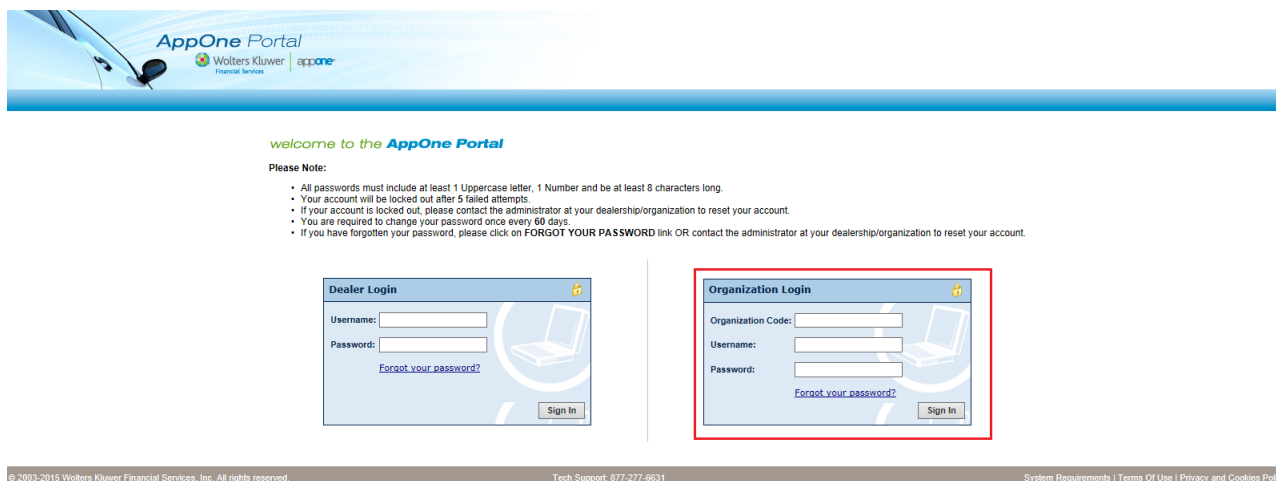
Always use the left side, **Dealer Login** area if you are logging in from a dealership.



The screenshot shows the AppOne Portal login page. At the top, there is a header with the AppOne Portal logo and Wolters Kluwer Financial Services branding. Below the header, a welcome message reads "welcome to the AppOne Portal". A "Please Note:" section contains several bullet points regarding password requirements and account lockouts. Below this, there are two login forms: "Dealer Login" on the left and "Organization Login" on the right. The "Dealer Login" form is highlighted with a red rectangular box. It contains fields for "Username:" and "Password:", a "Forgot your password?" link, and a "Sign In" button. The "Organization Login" form contains fields for "Organization Code:", "Username:", and "Password:", a "Forgot your password?" link, and a "Sign In" button. At the bottom of the page, there is a footer with copyright information, tech support contact, and links to system requirements, terms of use, and privacy policy.

## Organization Login

To log in as a user from an organization or service company, enter your **Organization Code**, **Username**, and **Password** on the **right** side, in the **Organization** area.



This screenshot is identical to the one above, showing the AppOne Portal login page. However, in this version, the "Organization Login" form on the right is highlighted with a red rectangular box, while the "Dealer Login" form on the left is not highlighted.

## New for Auto

- 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

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

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

App ID: 1306729 Customer Name: ROBERT TESTCO

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

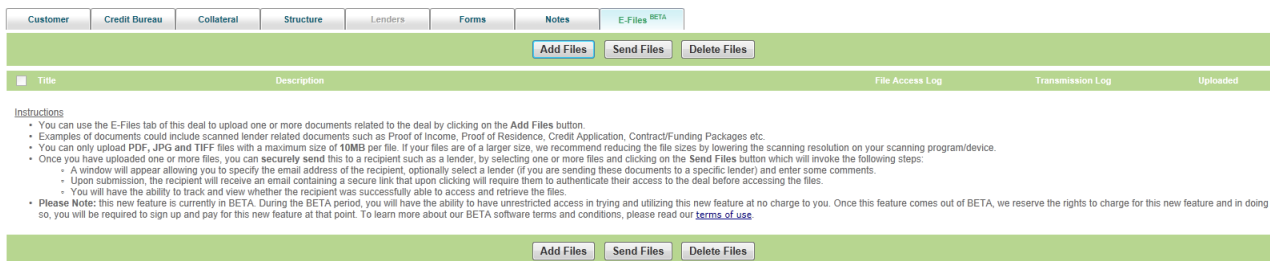
Save Proceed To Next Step >>

☐ **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

- Upload stips or other files, such as a driver's license, on the **E-Files** tab—easily send required information to your lender.



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

Add Files Send Files Delete Files

Title	Description	File Access Log	Transmission Log	Uploaded
<p><b>Instructions</b></p> <ul style="list-style-type: none"> <li>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.</li> <li>Examples of documents could include scanned lender related documents such as Proof of Income, Proof of Residence, Credit Application, Contract/Funding Packages etc.</li> <li>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.</li> <li>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"> <li>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.</li> <li>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.</li> <li>You will have the ability to track and view whether the recipient was successfully able to access and retrieve the files.</li> </ul> </li> <li><b>Please Note:</b> 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 <a href="#">terms of use</a>.</li> </ul>				

Add Files Send Files Delete Files

- Enable all your lenders on the My Lenders page—your integrated AppOne lenders, RouteOne lenders, and lenders that you contact by FAX can all be set up or enabled in one place.

## AppOne's Recent Enhancements

- Create documents for a cash deal—do all your deals on AppOne by subscribing to AppOne on the **Admin Console** tab.
- Create Buy Here/Pay Here deals--provide financing directly to your customers, instead of submitting deals to third-party lienholders.
- 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

- Access multiple integrated lenders—reach all your lenders easily from one place.
- 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						<a href="#">Virginia Fee Updates</a>

- 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 your lender.

## Check your set-up on the Admin Console Tab

### Check your lenders

- Make sure your lenders are set up or enabled on the **myLenders** page.
- To enable your **Other Lenders**:
  - Click the **Activate Free 30-Day Trial** button to activate a free trial.
  - Click the **click here** link to subscribe.

To sign up for this option, [click here](#) to download and complete the Subscription Form to enable this access.

**Activate Free 30-Day Trial**

By subscribing, you'll be able to set up and configure all your lenders in your AppOne portal, even local ones. With this functionality, you can:

- Set up and configure lenders that are currently not integrated into the platform.
- Set up custom form batches for use with non-AppOne lenders and even cash deals!
- Enter and track fax callbacks received from non-AppOne lenders.
- Access and print the latest versions of Bankers Systems Motor Vehicle and Goods and Services loan documentation to help you better stay compliant with the ever-changing regulatory landscape.

### Enable the online credit app feature

To set up a credit application for your customers to fill out online, go to the Online Credit Application page and enable the feature.



## Create a Deal

### Starting the deal

- Log on at <https://gateway.appone.net/dealer/>.
- On the **Home** tab, click the **New Deal** button.

### Customer tab

- 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.
- Check the **Cash Deal** box to make this a cash deal.
- **Customer** tab fields are locked once you've submitted the deal to a lender. Check the **Edit Info** box if you need to make changes.
- Enter references on the **Customer** tab, not with the structure information.
- When information on the **Customer** tab is complete, click the **Proceed to Next Step** button.
- Updates facilitate compliance with Equal Credit Opportunity Act (ECOA) - Regulation B :
  - A box with the following disclaimer was added when more than one applicant is entered:

By entering multiple applicants, you hereby affirm and certify that the applicants have been informed and have consented to jointly applying for credit and are relying on joint income and assets as the basis for repayment for the credit requested.

Users must check the box above when entering deals with more than 1 applicant to proceed.
  - The following disclaimer was added to the **Other Income Information** section:

Alimony, child support, or separate maintenance income need not be revealed if you do not wish to have it considered as a basis for repaying this obligation.

Customer	Credit Bureau	Collateral	Structure	Lenders	Forms	Notes	E-Files <small>BETA</small>
----------	---------------	------------	-----------	---------	-------	-------	-----------------------------

Save Proceed To Next Step >>

Application Type: 2 Individuals

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

☒ By entering multiple applicants, you hereby affirm and certify that the applicants have been informed and have consented to jointly applying for credit and are relying on joint income and assets as the basis for repayment for the credit requested.

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

FName: JARED MI: LName: TESTCO Suffix:   
 SSN: 749-83-2479   
 DOB: 05/05/1981   
 Home Phone: 749-283-7423   
 Cell Phone:   
 DL No:   
 Email:   
**Current Residence Information**   
 Address: # 111 Street: 1ST ST S Apt #:   
 Zip/City/State: 11211 BROOKLYN NY   
 County: KINGS   
 How Long? 3 years 0 months   
 Status: own   
 Rent/Mortgage Pmt: \$0   
 Landlord/Mortgage Co:   
 Landlord/Mortgage Phone:   
 mm

**Applicant #2 - Personal Information (MUST MATCH DRIVER'S LICENSE)**

FName: MI: LName: Suffix:   
 SSN:   
 DOB:   
 Applicant Relation:   
 Home Phone: 749-283-7423   
 Cell Phone:   
 DL No:   
 Email:   
**Current Residence Information** Check here to copy Applicant 1's Info   
 Address: # 111 Street: 1ST ST S Apt #:   
 Zip/City/State: 11211 BROOKLYN NY   
 County: KINGS   
 How Long? 3 years 0 months   
 Status: own   
 Rent/Mortgage Pmt: \$0   
 Landlord/Mortgage Co:   
 Landlord/Mortgage Phone:   
 mm

## 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

- **Collateral** tab fields are locked once you've submitted the deal to a lender. You must submit a vehicle change request to change the collateral information. Click the **Vehicle Change Request** button to begin the process.
- Enter the **VIN** and **Mileage**, and click the **Lookup** button. Then click the **Bookout** button. If the **VIN** is correct, the system values the vehicle.
- If the **Lookup** and **Bookout** buttons do not return the correct vehicle information, check the **Enable Manual Entry** box to enter the information manually.
- 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 <small>BETA</small>
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Save Proceed To Next Step >>

**Vehicle Information**

Collateral Type: Auto Includes automobiles, light/medium duty trucks and vans. Inventory Stock Number:

Type: Used ☐ Certified Pre-Owned

VIN: RESET

☒ Enable Manual Entry

Year: 2015

Make: MAKE

Model: MODEL

Body Style:

Mileage:

Color:

MSRP: \$12,500.00

Dealer Cost/Invoice: \$0.00

**Bookout Information**

You have chosen to manually enter the details of the unit. The book-out function is not available with the manual entry option.

Save Proceed To Next Step >>

## 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 **Proceed to Next Step** button.
- When you are done selecting a lender, come back to the **Structure** tab to confirm the structure and add back-end products.
- **Structure** tab fields are locked if the deal status is **Sent to Bank** or greater.

#### Lenders tab

- Select a lender by checking the corresponding **Select Lender** box, and click the **Submit to Selected Lenders** button.
- For AppOne lenders, click the browser's refresh button to check if the decision was returned.
- For non-AppOne lenders, select an option in the **Decision** list and complete the remaining information.
- Click the **Select/Print** button for the lender.

#### Forms tab

- Enter insurance information.
- Print the Risk-Based Pricing Notice and the Adverse Action by clicking the appropriate button.
- Click the **Print Selected Forms** button to open a PDF with all the forms.
- **Forms** tab fields and buttons are locked if the deal status is **Sent to Bank** or greater.

#### Notes tab

- You can add a note to the deal at any time.

#### E-Files tab

- Attach scanned document files, such as driver's licenses or credit applications, to the deal.
- Send the attached files by email to the lender.

Customer	Credit Bureau	Collateral	Structure	Lenders	Forms	Notes	E-Files <small>BETA</small>
<div> <input type="button" value="Add Files"/> <input type="button" value="Send Files"/> <input type="button" value="Delete Files"/> </div>							
Title	Description	File Access Log		Transmission Log		Uploaded	
<p><b>Instructions</b></p> <ul style="list-style-type: none"> <li>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.</li> <li>Examples of documents could include scanned lender related documents such as Proof of Income, Proof of Residence, Credit Application, Contract/Funding Packages etc.</li> <li>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.</li> <li>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"> <li>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.</li> <li>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.</li> <li>You will have the ability to track and view whether the recipient was successfully able to access and retrieve the files.</li> </ul> </li> <li>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 <a href="#">terms of use</a>.</li> </ul>							
<div> <input type="button" value="Add Files"/> <input type="button" value="Send Files"/> <input type="button" value="Delete Files"/> </div>							

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