



AppOne

2015.1 Platform EXTERNAL Release Notes

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U.S. Patent No. 7,734,530

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Ability to Add Notes on Deal

Users are now able to attach notes to a deal from the portal. The new **Notes** tab includes an **Add Notes** button and a list of existing notes. To attach a note, the user clicks the **Add Notes** button and enters text in the **Add Notes** pop-up. An **Add Notes** button was also added to the **Lenders** tab.

Notes tab

The screenshot shows the Specialty Dealer Portal interface. The header includes the logo and navigation links: HOME, CREDIT REPORTS, LENDERS, ADMIN CONSOLE, SUPPORT, and ANNOUNCEMENTS. A user login bar displays "App ID: 1305632" and "Customer Name: GUY TESTCO". Below this is a tabbed interface with tabs for Customer, Credit Bureau, Collateral, Structure, Lenders, Forms, Notes (selected), and E-Files BETA. An "Add Note" button is visible below the tabs. The main content area shows a table with columns "For", "Note", and "Added By". The table contains one entry: "from dealer", "This Is An Example Note.", and "Kyle Marthaler 4/16/2015 4:29 PM".

Add Notes popup

The screenshot shows the "Add Note" popup window. It has a title bar "Add Note" with a close button. The main area contains a text input field with the text "Note: This is an example note." and a vertical scrollbar. Below the input field is an "Add Note" button.

Add Mailing Address for PO Boxes

We added an **Enter Mailing Address (different than Current/Physical Address)** checkbox to applicant information pages on all portals. If the box is checked, **Address**, **Zip/City/State**, and **County** fields open to allow entry of a mailing address. A post office box number can be entered in the **Address** field for the mailing address.

Applicant #1 - Personal Information (MUST MATCH DRIVER'S LICENSE)
FName: MI: LName: Suffix:
SSN: - -
DOB: / /
Home Phone: - -
Cell Phone: - -
DL No:
Email:

Current Residence Information
Address #: Street: Apt #:
Zip/City/State:
County:
How Long? years months
Status:
Rent/Mortgage Pmt:
Landlord/Mortgage Co:
Landlord/Mortgage Phone: - -
☐ Enter Mailing Address (different than Current/Physical Address)

Current Employment Information
Status:
Occupation:
Employer Name:

☒ Enter Mailing Address (different than Current/Physical Address)
Address:
Zip/City/State:
County:

Faxed Credit App Updates

We updated the faxed credit application template to clarify the status of a secondary applicant and to clarify that the faxed document is not intended to be a signed credit application. The following revisions were made:

- The Secondary Application relation will populate with whatever value chosen by the dealer on the portal. Possible values include:
 - Spouse
 - Joint
 - Cosigner
 - Comaker
 - Guarantor
 - AuthorizedUser
- Add a title: “Transaction Summary to Lender”
- Added language at top of form (below the title): “This form is not an application completed by buyer.”
- Removed both “Alimony” boxes and language at right of form.
- Removed the “certification” paragraph at bottom of form.

Transaction Summary to Lender					
This form is not an application completed by buyer					
DO NOT TOUCH IWP SALES LA					
123 SOME DEALERSHIP ST. SUITE 101A DEALERSHIP CITY LA 00001 PHONE: 000-000-1234 FAX: 866-422-9910					
PRIMARY APPLICANT					
Full Name: MIKE TEST		SSN: 423-42-4234		DOB: 5/5/1975	
Address: 1111 1ST ST S		City: BROOKLYN		State: NY Zip: 11211	
How Long: 3Yrs.	Phone: 423-423-4324	Pmt: \$0.00	To:	Status: Own	
Previous Address:					
Employer: NURSECO	Occupation: NURSE	Address: BROOKLYN, NY 11211		Ph: 423-423-4324	
Salary: \$4,343.00 monthly.	How Long: 3Yrs.	Other Income: \$0.00/month	Source:		
Previous Employer:					
Second Job:					
Personal Reference #1:		Personal Reference #2:			
Bank References:		Signature: On file dated 4/17/2015		Drivers License No:	
SECONDARY APPLICANT					
Full Name: JILL TEST		SSN: 423-42-4234		DOB: 5/5/1975 Relation: Cosigner	
Address: 1111 1ST ST S		City: BROOKLYN		State: NY Zip: 11211	
How Long: 3Yrs.	Phone: 789-564-6542	Pmt: \$0.00	To:	Status: Own	
Previous Address:					
Employer: WALMART	Occupation: SALESMAN	Address:		Ph: 423-423-4234	
Salary: \$2,850.00 monthly.	How Long: 3Yrs.	Other Income: \$0.00/month	Source:		
Previous Employer:					
Second Job:					
Personal Reference #1:		Personal Reference #2:			
Bank References:		Signature: On file dated 4/17/2015		Drivers License No:	
COLLATERAL INFORMATION					
Serial No: 1N6AD07U66C407987	Year: 2006	Age: Used	Make: NISSAN	Model: FRONTIER CREW CAB-V6	
Style: CREW CAB SE 2WD	Book Value w/adds: \$11,025.00			Mileage: 45120	
Options/Accessories: ALUMINUM/ALLOY WHEELS					
TRADE-IN INFORMATION					
Trade #1: 2007 TRADEMAKE TRADEMODEL US BANK			Trade #2:		
DEAL STRUCTURE					
Selling Price: \$12,550.00	Taxes: \$1,155.00	Trade In Allowance: \$1,000.00	Trade In PayOff: \$500.00	Cash Down: \$3,000.00	Amt. Requested: \$9,775.00
Payment: \$108.47	Total Fees: \$70.00	Total Products: \$0.00	Rebate: \$500.00	Term: 120	Rate: 5.99

Generated from the AppOne System. To learn more about AppOne and how it can help automate your indirect lending processes go to <http://www.appone.net>.

MB Finance - App Resubmission Turned Off

We turned off app resubmission for all MB Finance programs.

[illegible]

NADA Motorcycle Book-Out

We implemented NADA book-out functionality for MotorCycle/ATV dealers. On the Collateral page, if the dealer is enabled for a MotorCycle/ATV lender program that requires an NADA book-out, the following message is displayed:

If you plan on submitting this application to one of the following lenders, you must perform a NADA book-out prior to submitting the application to the lender.

Note:

Currently, only MB Financial Bank MotorCycle & ATV programs will be enabled to require a book-out.

The **Nada Book-Out** button opens a series of pop-ups that step the user through **Year**, **Make**, **Model Type**, **Model & Trim**, and **Options** selections. The final pop-up shows **Pricing** information and includes a **Save Collateral & Book Out to Application** button.

Collateral tab before book-out

App ID: 1305053 Customer Name: JOHN DOE

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

Save Proceed To Next Step >>

Collateral Information


Collateral Type: Motorcycle Inventory Stock Number:

NADA Book-Out

Type: Year: Make: Fuel Type: Serial Number: Model: Body Style: Mileage: 0

ORIGINAL MSRP: \$0.00

NADA book-out pop-up, select Year




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Vehicle Information

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Click on a year below to get the Manufacturers.

[Home](#) > [Year](#) > [Make](#) > [Model Type](#) > [Model & Trim](#) > [Options](#) > [Values](#)



Motorcycles

[2015](#) [2014](#) [2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#)
[2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#) [2000](#)
[1999](#) [1998](#) [1997](#) [1996](#)

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Collateral tab after book-out

Customer

Credit Bureau

Collateral

Structure

Lenders

Forms

Notes

E-Files BETA

App ID: 1305053 Customer Name: JOHN DOE

Save

Proceed To Next Step >>

Collateral Information

Collateral Type: Motorcycle

Inventory Stock Number:

NADA Book-Out

Type: Used

Year: 2013

Make: Harley-Davidson

Body Style:

ORIGINAL MSRP: \$11,124.00

Fuel Type:

Serial Number:

Model: XL1200X Forty-Eight

Mileage: 0


Bookout Information

	Rough Trade-In/Wholesale	Clean Trade-In/Wholesale	Average Retail
Base:	7,090	8,740	10,120
Accessory:	0	290	467
Final:	7,090	9,030	10,587

Vehicle Accessories

AM/FM Radio/CD/Aux w/Speakers


NADA book-out pop-up, final values



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[Home](#) > [Year](#) > [Make](#) > [Model Type](#) > [Model & Trim](#) > [Options](#) > Values



Motorcycles
2013
Harley-Davidson
XL1200X Forty-Eight

2013 Harley-Davidson Cruisers

4/1/2015 10:10:16 AM



Save Collateral & Book Out to Application

PRICING

	Rough Trade-In/Wholesale	Clean Trade-In/Wholesale	Average Retail
Base Price	8740	7090	11124
Options			
AM/FM Radio/CD/Aux w/Speakers	467	290	0
Total Price	9030	7090	11124

NADA bookout filter rule

Submit to Selected Lenders

Integrated Lenders						
	Default Program	Default Program	CUAC Motorcycle Indirect (LA)	Marine One Motorcycle Program	MBF Motorcycle Indirect	Merrick Default Program
FICO Score	n/a	n/a	?	?	?	n/a
Time on Credit File	n/a	n/a	?	n/a	?	n/a
# of Tradelines	n/a	n/a	?	n/a	?	n/a
Job Time	n/a	n/a	✓	n/a	✓	n/a
Residence Time	n/a	n/a	✓	n/a	✓	n/a
Max Advance	n/a	n/a	✓	✓	✓	n/a
Down Payment	n/a	n/a	n/a	✓	n/a	n/a
Min Loan Amount	n/a	n/a	n/a	✓	n/a	n/a
Max Loan Amount	n/a	n/a	n/a	✓	n/a	n/a
Lending Area	n/a	n/a	n/a	✓	n/a	n/a
Income	n/a	n/a	n/a	✓	n/a	n/a
Collateral	n/a	n/a	n/a	✓	n/a	n/a
NADA Bookout	n/a	n/a	n/a	n/a	✓	n/a
Notes	-	-	-	This lender's application interface appears to be experiencing intermittent connectivity issues. If you notice that callbacks are not coming back in a timely manner for this lender, then that could mean that the lender did not receive the application and you might need to re-submit the application. Please be sure to check with your lender prior to re-submitting any applications.		
SELECT LENDER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	-	-	-	-	-	-

Re-Activate Medallion Motorcycle Program

We re-activated the previously-disabled Medallion Motorcycle program. The program is enabled for Motorcycle, ATV, and UTV collateral types and has a CRIF ProductID to 192. It is enabled for these organizations:

- Blue Water
- EPIC
- INet
- Rock Solid
- MCF (Marine Coast Finance)

Remove "Documentation Fee" from Deal Structure for all Collateral Types in DE

We removed the **Documentation Fee** from the **Structure** tab for Delaware. Based on American Financial Services Association and the State Bank Commissioner's office interpretation of Delaware statutes, we have concluded that documentation fees are not permitted to be imposed on the buyer. Delaware dealers will no longer have a **Documentation Fee** available on the **Structure** tab.

Public Officials & Fees		
Title Fee:	<input type="text" value="\$0.00"/>	<input type="checkbox"/> tax
License Fee:	<input type="text" value="\$0.00"/>	<input type="checkbox"/> tax
Registration Fee:	<input type="text" value="\$0.00"/>	<input type="checkbox"/> tax
Lien Fee:	<input type="text" value="\$0.00"/>	<input type="checkbox"/> tax
UCC Filing Fee:	<input type="text" value="\$0.00"/>	<input type="checkbox"/> tax
Total Front-End:	\$25,000.00	

Remove URL in Text alerts

We removed the AppOne URL from alerts that are sent as text messages as the URL was getting transmitted properly on text messages causing it to not work properly on mobile devices.

Verizon 9:30 AM

< (2) donotreply@appone.... Contact

Text Message
Today 9:26 AM

(Application Status
Update - #
[1000683](#))
ApplicationID:
[1000683](#)
Customer Name:
TODD TESTCO

Status: Approved

Text Message Send

Scanned Docs Upload

We provided the ability to upload one or more scanned files, add them to a deal, and send them to an email recipient. An **E-Files** tab was added to each individual deal. From the **E-Files** tab, users can add, delete, and send files.

- The **Add Files** button opens an **Add Files** pop-up, which allows the user to select files, give each file a title and description, and upload the file. Files are restricted to PDF, JPG and TIFF files at this time.
- The **Send Files** button sends files to an email recipient. The recipient receives an email with a secure link which can be used to view and retrieve files.
- Each **View Log** link in the **File Access** log column opens a **File Access Log** pop-up listing the User Name and Access Date (including time) of all users who clicked on the file.
- Each **View Log** link in the **Transmission Log** column opens a **Transmission Log** pop-up listing the Recipient Email, Date Sent (including time), and Status (Not Accessed or Accessed plus user name, date, and time).

E-Files tab

App ID: 1253969 Customer Name: CODY TESTCO

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

[Add Files](#) [Send Files](#) [Delete Files](#)

Title	Description	File Access Log	Transmission Log	Last Modified
Titling/Registration		View Log	View Log	Kyle Marthaler 3/10/2015
Driver's License	Picture of Driver's License	View Log	View Log	Kyle Marthaler 3/10/2015
Funding Package		View Log	View Log	Kyle Marthaler 3/10/2015

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](#).

[Add Files](#) [Send Files](#) [Delete Files](#)

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Add Files pop-up

Add Files

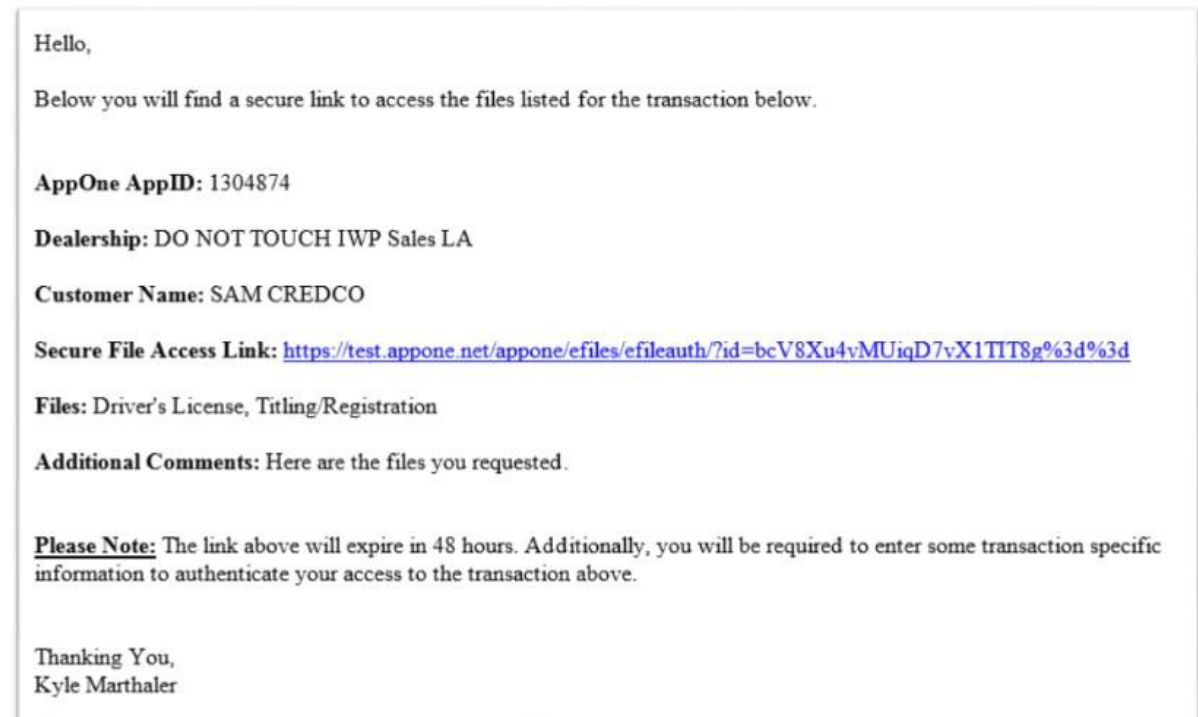
File Requirements

- 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.

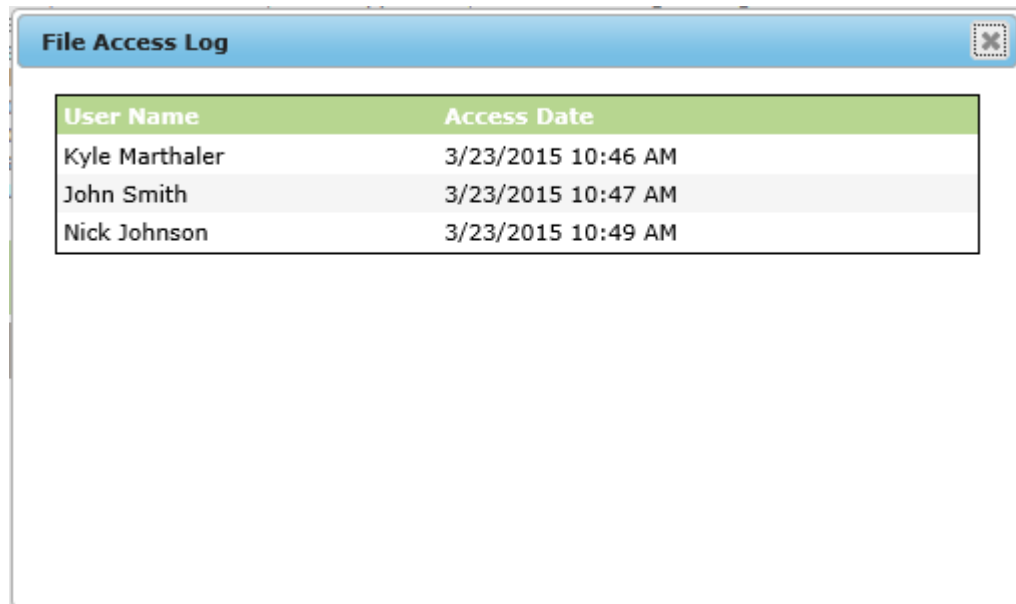
#	File Name	Document Title	Description	Size	Progress	Status
1	CCITT_1.TIF	Driver's License	Picture of Driver's License	18 kb	0%	Queued
2	MARBIBM.TIF	Titling/Registration		2.5 mb	0%	Queued
3	Certificate.pdf	Funding Package		96 kb	0%	Queued
4	embeddedsection.pdf	Contract	RIC	8.1 mb	0%	Queued
				10.7 mb	0%	Remove All

[Add Files](#) [Start Upload](#)

Email with link to file



File Access Log pop-up



Transmission Log pop-up

File Transmission Log		
Recipient Email	Date Sent	Status
support@appone.net	3/23/2015 10:48 AM	Not accessed
kyle.marthaler@wolterskluwer.com	3/23/2015 10:48 AM	Last accessed by Nick Johnson on 3/23/2015 10:49 AM

Set Up MarineOne Stips on all Programs

We updated the portal so that all MarineOne stips display on callbacks for all MarineOne programs.

Funding Stips:

- Signed Completed Original Retail Installment Contract (must be printed out from AppOne System) ✖
- Authorization Agreement for Preauthorized Payments (when applicable) ✖
- Sales Tax form (if sales tax is not included on the contract) ✖
- Original signed Credit Application ✖
- Insurance Binder ✖
- Application for Title ✖
- Copy of Warranty, Gap Insurance and Service Contract (when applicable) ✖
- Copy of Credit Life or Accident and Health (when applicable) ✖
- Telephone Bill (Home phone OR Cell Phone Bill / AND Utility Bill) ✖
- Proof of Income - Primary Signer (Taxable Income only. Tax return required for self-employed customers; 1099's alone are not acceptable as proof of income.) ✖
- Proof of Income - Co-Signer (when applicable) ✖
- Drivers License ✖
- Personal References (need four names and phone numbers) ✖
- Arkansas Financing Notification ✖
- Factory invoice or bookouts for boat, motor and trailer ✖
- Title Applications for Boat and Trailer ✖
- UCC – 1 forms where applicable ✖
- USED UNITS: Copy of front and back of previous title - Boat and Trailer ✖
- Completed Funding Checklist for Customer's State ✖
- Copy of signed Buyers Order. ✖
- Please refer to the Marine One factsheet for program details ✖
- Employment for Primary Applicant must Verify Current at the time of Funding ✖
- Employment for Co-Applicant must Verify Current at the time of Funding ✖
- Registration and title fees receipt (if applicable) ✖
- Marine One Notarized Power of Attorney form ✖
- New UNITS: Copy of the front and Back of the MSO. Please send the Original MSO for Non-titling states. ✖

Terms of Use Update

The terms of use have been updated and are available on the portal in the following locations:

- New user announcement
- Terms of Use links in footer & also on EFiles pages.
- Support tab

Update ELT Codes for MarineOne

The ELT codes for MarineOne for fourteen states were updated as follows:

State	Code
Arizona	752686951
California	W54
Florida	201588330
Georgia	1106762042
Kansas	KSElien
Kentucky	752686951
Louisiana	EDMA
Missouri	90011108800
North Carolina	30919380
Nevada	860695380
Pennsylvania	75268695101
South Carolina	30733309 or MAC3309
Texas	75268695100
Virginia	ELTM6

Full Legal Name or Business Name & Address: DO NOT TOUCH IWP Sales GA 123 Some Dealership Street, Suite 101A Dealership City, GA 00000		Lessee
If Georgia Seller, GA County Name Dealership County	*Directly Financed Dealer Sale <input type="checkbox"/>	Lessee
Number of Security Interests or Liens: 1		Security Interest
Security Interest Holder's/Lien Holder's ELT 12 Digit Customer ID # 001106762042		Security Interest N/A
Name & Address of 1st Security Interest Holder/Lien Holder:		Name

Update UAC Loss Payee Address

We updated the UAC loss payee address on the Agreement to Provide Insurance. The address now prints as follows:

United Auto Credit Corporation
P.O. Box 390008
Minneapolis, MN 55439-0008

100000943	
Agreement to Provide Insurance	
Seller\Lessor (Name and Address) DO NOT TOUCH RMS Auto Sales LA 2345 PAUL ST Ste 10 Baton Rouge, LA 70809	Buyer\Lessee (Name(s) and Address(es)) DANA STOERMANN 444 4TH ST S CLEVELAND, OH 44144
Transaction No. 54645	Date 03/13/2015
Insurance Requirements	Coverage
Acknowledgment of Insurance Requirements. You have entered into a transaction with the Seller\Dealer that requires you to keep the collateral associated with the transaction insured. Your transaction documents contain the details of the insurance requirements. You agree that the Seller\Lessor (or its Assignee) has the authority to contact the insurance company for any issues related to the insurance coverage for this transaction.	<input type="checkbox"/> Collision Deductible \$ _____ <input type="checkbox"/> Comprehensive Deductible \$ _____ <input type="checkbox"/> _____ Deductible \$ _____
	Loss Payee (Name and Address) United Auto Credit Corporation P.O. Box 390008 Minneapolis, MN 55439-0008

User Provisioning Updates

We simplified the ability for users to reset passwords on the portals without needing to contact SupportLine. The following changes were made:

- The **Admin Console Add/Edit User** screen was updated to add an **AutoGenerate** button and a **Send email to user with login credentials** checkbox.
- On the **Password Reset Form**, the validation message now instructs the user to contact the Dealer Owner or Administrator with log-in problems. Previously, the validation message advised users to contact Supportline.
- An **Email** field was added to the **Password Change Form**.

After 3 failed login attempts, the user is brought automatically to the **Forgot Password** screen to reset the password. After 5 failed login attempts, the user account is locked and the user must contact the Dealer Administrator to unlock the account and generate a new temporary password.

Admin Console

Specialty Dealer Portal

Wolters Kluwer

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appone

Tech Support: 877.404.6788

Welcome Back Kyle (DO NOT TOUCH RWP SALES LA Lot ID#: 7737)

SAP Customer #: 13245X

Quick Quote | Logout

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

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 | 3rd Party Interfaces

Add/Edit User

First Name:

Last Name:

Email Address:

Title: Accounting

Username:

AutoGenerate

Password: (Click the AutoGenerate button to generate a password.)

Mobile Phone Number: - -

Admin: no

Status: active

☒ 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.

Add

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New validation message

The following errors were found on this form:

The system was unable to locate any user record based upon the information entered. Please verify the information and try again. If you are still having difficulty, then please contact the Dealership Owner/Administrator.

welcome to the AppOne Dealer Portal

Instructions:

- Please enter your username or your email address. It is recommended that you enter your username if you know it.
- If the system is unable to locate your user record, then please contact the administrative user for your dealership to reset your account password for your user account.

Password Reset Form


Username: fakeusername1

OR

Email:

Change Password

Password Change Form

Password Change Form 

User: kmtestrecla

New Password:

Confirm New Password:

Email:

Security Question:

* Security Answer:

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