



AppOne

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Add Co-applicant Name to Callback Approval

We added the co-applicant name to the callback approval for joint applications.

Lender:Bank of America, N.A.



Dealer Name: **DO NOT TOUCH IWP Sale's LA**Customer Name: **MATT TESTCO / MEGAN TESTCO**

App #:	1324039	Transmission #:	100720124	Decision:	APPROVED
Lender AppID:	0	Analyst Name:	Default Organization	Analyst Phone #:	000-000-0000
Buy Rate:	2.00%	Max Rate:	22.00%	Max Term:	160 mths
Advance Amount:	—	Max LTV:	—	Max Pmt:	—
Max Loan Amt:	—	Min Cash:	—	Max VSC:	—
Max GAP:	—	Max Back-End:	—	Acq Fee:	(\$0.00)
Max Credit Insurance:	—	Callback Date:	6/9/2016 10:19:21 AM	Tier:	—

Notes:


- Application processed successfully.

Funding Stips:

- Buyers Order/Bill of Sale (fully completed & signed by all parties)
- Notice to Co-Signer Form (required when a borrower signs the loan contract, but is not listed on the title or Ship Mortgage)
- Insurance policy/binder to include effective date, policy #, agent phone #, loss payee, amount of coverage and deductible. (Coverage should be equal or greater than the amount financed with a minimum deductible of no more than 2% or \$1,000.00, whichever is greater.)
- Copy of title applications for Boat, Motor, Trailer or Recreational Vehicle signed by all parties or Bank of America Guarantee of Lien (required for all titled collateral)

Add New Location

To provide Risk Mitigation Services (RMS) auto dealers with the ability to add new locations, we added an **Add New Location** link to the **ADMIN CONSOLE**. The dealer clicks the link and is brought to a page that steps through the application process.



Dealer Support: 877.277.4633
Welcome Back Kyle (DO NOT TOUCH RMS AUTO SALES LA Lot ID# 7358)
SAP Customer # Tool
[Quick Guide](#) | [Logout](#)

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

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

END APP | Enter AppID OR Last Name | GO



Online Dealership Application

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

Getting Started | Dealership Info | Management Info | Confirm & Submit

Welcome to the Online Dealership Application! This online application process will guide you through in entering and capturing all the information for us to properly process your dealership application. Before you start the online application process, please take a little time to collect the pieces of information outlined below. You will need these to successfully complete the online dealership application.

Dealership Information

- Dealership Name / Legal Business Name
- Address, Phone & Fax Numbers
- Corporation Type (Corporation, LLC, Partnership, Sub-Chapter S or Sole Proprietorship)
- Federal Tax ID Number & Dealer License Number
- Brand Company & Number
- # of Years in Business & Current Management
- # of Owners & Staff

Information on Owners & Managers

- Name / SSN / DOB
- Home Address & Phone Numbers
- Driver License Number & State
- E-mail Address & Ownership Structure
- Years in Community & Industry

References

- Physician (Name, Contact Info & Credit Line)
- Auction (Name & Contact Info)
- Trade Reference (Name & Contact Info)
- Retail Lenders - Financing Sources (Name Only)
- Vehicle Service Contract & GAP Providers (Name Only)

Inventory & Sales Information

- Avg. # of Units Carried
- Avg. Year Model & Mileage
- Avg. Monthly Sales (Cash & Retail)
- Avg. Monthly Sales
- Avg. Monthly Prime & Non-Prime Finance Sales
- Avg. Vehicle Service Contract & GAP Sales

Fees

- Setup & Activation Fee: \$299 per dealership location
- Subscription Fee: \$100/month

Start the Application

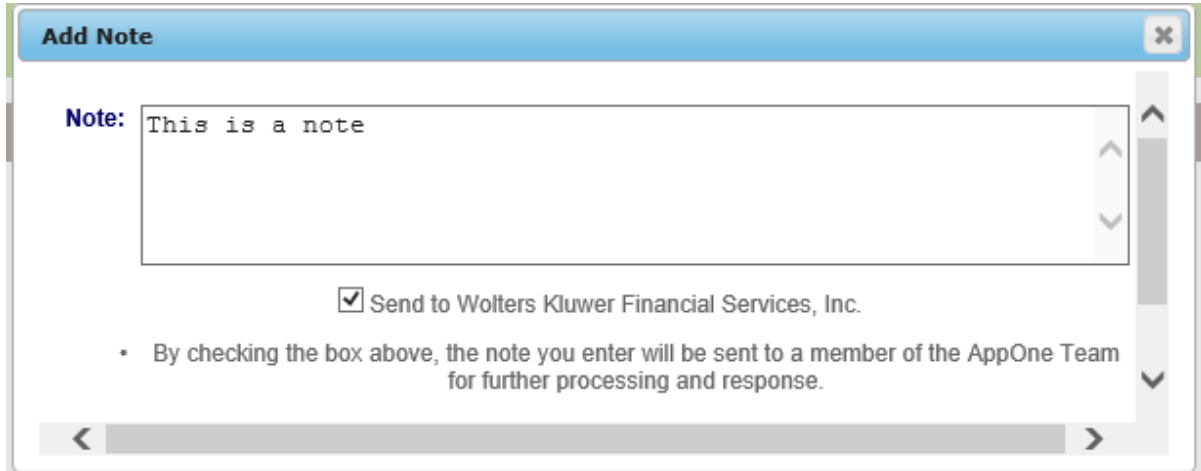
1

 **Wolters Kluwer**
Financial Services

Add Note

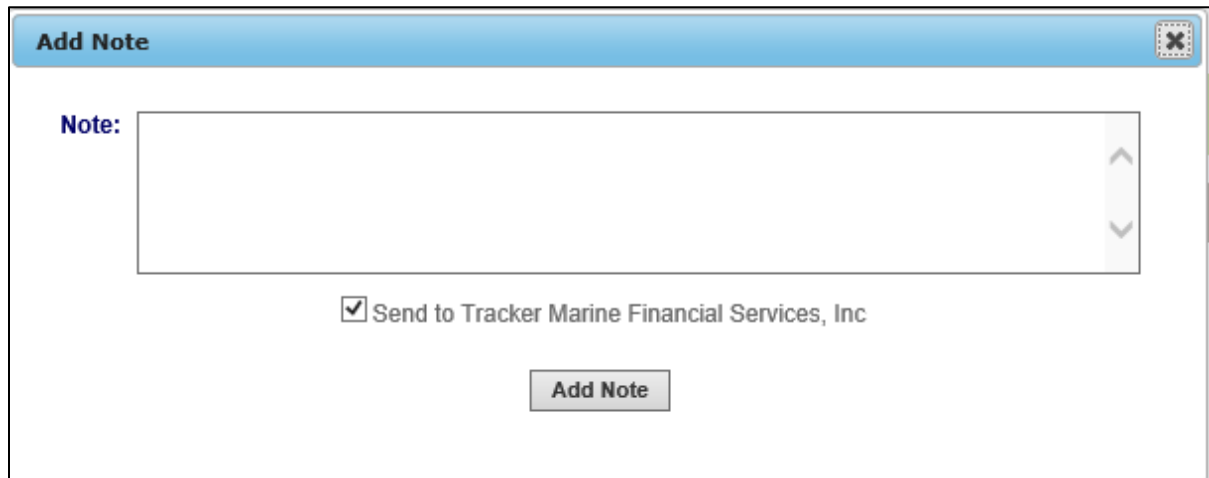
We updated the **Add Note** dialog (**Notes** tab) so that the **Send to Wolters Kluwer Financial Services** box is checked when it is present (such as for RMS, TMFS, and S1 dealers). For RMS dealers, instructions were added to the dialog.

RMS



The screenshot shows a dialog box titled "Add Note" with a close button (X) in the top right corner. Inside the dialog, there is a text area labeled "Note:" containing the text "This is a note". Below the text area, there is a checked checkbox labeled "Send to Wolters Kluwer Financial Services, Inc.". Underneath the checkbox, there is a bullet point that reads: "By checking the box above, the note you enter will be sent to a member of the AppOne Team for further processing and response." The dialog has a scroll bar on the right side.

TMFS



The screenshot shows a dialog box titled "Add Note" with a close button (X) in the top right corner. Inside the dialog, there is a text area labeled "Note:" which is currently empty. Below the text area, there is a checked checkbox labeled "Send to Tracker Marine Financial Services, Inc". At the bottom center of the dialog, there is a button labeled "Add Note".

Apostrophe in Dealership Name Disables Send Message Functionality

We corrected an issue caused by apostrophes in dealer names when using the **Send Message** function. Now, the user submits a message from the lender callback, the message goes through regardless of the dealership name.

Type	Comment	Comment User	Comment Date
dealer comment	Kyles Message	kmtestrecla	6/9/2016 11:14:39 AM
dealer comment	This is a Message from a dealer with an apostrophe	rmtestrecla	6/21/2016 10:57:13 AM

E-Files Enhancements

To clarify the e-files process and make it easier for the dealer to route e-files, we made the following updates:

- A **Department** list was added to the **Send Files** dialog.
 - The **Department** list opens when the dealer selects a lender if email addresses and departments are configured for that lender. The dealer then selects a department, and the **To** field populates with an email address configured for the lender and department.

- When the dealer selects a lender, but email addresses and departments are not configured for that lender, no **Department** list opens and the dealer can enter email addresses manually in the **To** field.

■ In the **E-Files** tab:

- A **Delete** link was added to files that have not been sent.
- The instructions were updated.
- References to **Beta** were removed.

Send Files dialog—departments and email addresses configured for the lender

Send Files

From: test@email.com

Lender: Wells Fargo Dealer Services - Wells Fargo Program ▼

Department: Underwriters ▼

To: underwriter1@wellsfargo.com;underwriter2@wellsfargo.com

Comments:

Send Files **Cancel**

Instructions

- Please enter one or more email addresses separated by semi-colons of the recipients to whom you wish to securely send the selected files.
- 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.

Send Files dialog— departments and email addresses not configured

Send Files

From: test@email.com

Lender: Wells Fargo Dealer Services - Wells Fargo Program

Department: Underwriters

To: underwriter1@wellsfargo.com;underwriter2@wellsfargo.com

Comments:

Send Files Cancel

Instructions

- Please enter one or more email addresses separated by semi-colons of the recipients to whom you wish to securely send the selected files.
- 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.

E-Files tab-- — E-Files tab—New Delete link and updated Instructions

AppOne Portal

Wolters Kluwer

Dealer Support: 877-277-4631

Welcome Back Kyle (DO NOT TOUCH RMS AUTO SALES LA Lot ID: 7368)

SAP Customer #: 1161

Quick Guide | Logout

HOME CREDIT REPORTS LENDING VENDORS ADMIN CONSOLE SUPPORT ANNOUNCEMENTS

App ID: 1321255 Customer Name: SIMONE MARTY

ENTER APPID Enter AppID OR Last Name

Customer Credit Bureau Collateral Structure Lenders Forms Notes E-Files

Add Files Send Files

Title	Description	File Access Log	Transmission Log	Timestamp	Delete
<input type="checkbox"/> Stipulation	Example Description	View Log	View Log	Kyle Matheson 5/20/16 9:55 AM CT	Delete
<input type="checkbox"/> Proof of Residence		View Log	View Log	Kyle Matheson 5/20/16 9:56 AM CT	Delete
<input type="checkbox"/> Proof of Income		View Log	View Log	Kyle Matheson 5/20/16 9:56 AM CT	Delete
<input type="checkbox"/> Funding Notice		View Log	View Log	Kyle Matheson 5/20/16 9:56 AM CT	Delete
<input type="checkbox"/> Credit Application		View Log	View Log	Kyle Matheson 5/20/16 9:56 AM CT	Delete

Instructions

- DOCUMENT UPLOAD
 - Click on the Add Files button to upload one or more scanned documents and files to the e-file repository for this deal.
 - Examples of documents could include consent 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.
- DOCUMENT SUBMISSION
 - Once you have uploaded your documents, select the documents and click on the Send Files button to securely send the documents to a recipient such as a lender.
 - When you click on the Send Files button, 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.

Add Files Send Files

Expand Serial Number Field for Foreign HIN for Boats

To accommodate international hull identification numbers (HIN's), we expanded the **Serial Number** field for boats to 15 characters.

Collateral Information

Collateral Type: Marine Includes power boats, sail boats, outboard motors & boat trailers.

☒ **Boat Information**

Type	Year	Make	Model	Boat Length	Serial	Dealer Cost/Invoice	MSRP	Selling Price
New	2016	BoatMake	BoatModel	0	123456789012345	\$0.00	\$50,000.00	\$0.00

☐ **Motor Information**

☐ **Trailer Information**

Expand Serial Number Field for Marine Trailer Collateral

We expanded the **Serial Number** field for **Marine** collateral trailers from 16 to 17 digits. Trailer serial numbers typically have 17 digits.

Collateral Information

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

☒ **Boat Information**

Type	Year	Make	Model	Boat Length	Serial	Dealer Cost/Invoice	MSRP	Selling Price
New	2016	BoatMake	BoatModel			\$0.00	\$30,000.00	\$0.00

☒ **Motor Information**

Motor #1

Type	Year	Make	Model	HP	Fuel	Serial	Dealer Cost/Invoice	MSRP	Selling Price
New		MotorMake	MotorModel	0.00	INBOARD		\$0.00	\$10,000.00	\$0.00

(Add applicable Rigging Fees here)

+ Add Additional Motors

☒ **Trailer Information**

Type	Year	Make	Model	Axles	Serial	Dealer Cost/Invoice	MSRP	Selling Price
New	2016	TrailerMake	TrailerModel	0	12345678901234567	\$0.00	\$20,000.00	\$0.00

(Add applicable Freight Fees here)

F&I Express - Other Collateral Types

We updated the portal to make F&I Express available for service companies and for all collateral types. Previously, F&I Express was available to auto dealers only.

- Users can enable F&I Express through the **ADMIN CONSOLE 3rd Party Interfaces** page by checking the **Enable/Disable** box for F&I Express.

The screenshot shows the 'ADMIN CONSOLE' with the '3rd Party Interfaces' tab selected. Under 'Enable CREDCO', there is a checkbox labeled 'Enable CREDCO'. Below this, the 'OMS System Interfaces' section is visible, showing a table of system interfaces. The 'F&I Express' system is highlighted with a red box, and its 'Enable/Disable' checkbox is checked. The 'Save' button is at the bottom.

Enable/Disable	System Name	Description	System DealerID	Modified
<input type="checkbox"/>	IDS Astra DMS	This is an interface between the IDS Astra DMS and AppOne and enables dealers to export applications from IDS to AppOne.		--
<input type="checkbox"/>	System 2000	This is an interface between the Systems 2000 DMS and AppOne and enables dealers to export applications from Systems 2000 to AppOne.		--
<input type="checkbox"/>	Everlogic	This is an interface between the Everlogic DMS and AppOne and enables dealers to export applications from Everlogic to AppOne.		--
<input type="checkbox"/>	Supreme Software	This is an interface between the Supreme DMS and AppOne and enables dealers to export applications from Supreme to AppOne.		--

Enable/Disable	System Name	Description	Website	Modified
<input checked="" type="checkbox"/>	F&I Express	F&I Express is bringing aftermarket sales into the digital age with innovative technology that cuts costs, increases efficiency, and adds CSI never before seen in the industry.	Go to Website	Intouch 6/12/16 6:37 AM

[Save](#)

- Once enabled, users can use F&I Express to set up back-end products using the **Structure** tab or the **Forms** tab by clicking the **F&I Express** button.

The screenshot shows the 'F&I Express' form. The 'Structure' tab is selected. The 'Front-End Itemization' section on the left shows various pricing fields. The 'Back-End Products' section on the right has a red box around the 'F&I Express' button. Below the button, there are checkboxes for 'Vehicle Service Contract', 'GAP', 'Credit Life', 'Credit Disability', 'Pre-Paid Maintenance', 'Tire & Wheel Protection', and 'Theft Protection'.

Front-End Itemization

Selling Price: \$15,000.00
 Dealer Installed Options: \$0.00 [Modify Options](#)
 Total Selling Price: \$15,000.00 (Taxable Selling Price: \$15,000.00)
 Trade-In Allowance: \$0.00
 Trade-In Payoff: \$0.00
 Sales/Other Tax: (8.25000%) \$937.50 ☐ manual override
 Rebate: \$0.00
 Total Cash Down: \$0.00 [Deferred Down Payment?](#)
 Net Purchase: \$15,937.50

Back-End Products

[F&I Express](#)

☐ Vehicle Service Contract \$0.00
☐ GAP \$0.00
☐ Credit Life \$0.00
☐ Credit Disability \$0.00
☐ Pre-Paid Maintenance \$0.00
☐ Tire & Wheel Protection \$0.00
☐ Theft Protection \$0.00

Clicking the button opens a pop-up that allows the dealer to add products.

F&I Express

ExpressQuote


Quote ID: 1321372
Quote date: 11 May 2016

Customer Information
First Name Last Name

Vehicle Information
VIN Odometer In Service Date
Make Model Year

Products (click company name to expand)

Old Republic	Processing: 0
Penn Warranty	Processing: 0
Royal	Processing: 1

 **F&I EXPRESS**

[\[back to top\]](#)

Lenders Tab

In the top-level **LENDERS** tab, the **Contact/Send Message** link was changed to **Contact/Request More Information**. The link is used to send an email message to the lender.

The screenshot shows the 'Lenders' tab in the AppOne RMS Platform. The top navigation bar includes links for HOME, CREDIT REPORTS, LENDERS, VENDORS, ADMIN CONSOLE, SUPPORT, and ANNOUNCEMENTS. The 'LENDERS' tab is active, and the sub-tab 'RouteOne DSP Lenders' is selected. Below the navigation bar, there is a dropdown menu for 'Collateral Type' set to 'Auto'. A link 'Click here to view lender specific documents & forms' is present. The main content area displays the profile for 'CPS Consumer Portfolio Services, Inc.' with a logo and the text 'Consumer Portfolio Services'. To the right of the profile, there are two links: 'Contact/Request More Information' (highlighted in yellow) and 'Check Dealer App Status'. The profile text describes CPS as a consistent and profitable subprime solution for franchise and independent dealers, offering 7 proven programs with generous advance and covering a wide spectrum of credit including thin files, low FICO's, open CH 7's, recent repos and delinquent mortgages. It also states that this lender is an automotive lender that does business through the AppOne RMS Platform with independent auto dealers only. At the bottom, it lists the states where CPS is currently available: AL, AK, AZ, AR, CA, CO, CT, DE, FL, GA, HI, ID, IL, IN, IA, KS, KY, LA, ME, MD, MA, MI, MN, MS, MO, NE, NV, NH, NJ, NM, NC, ND, OH, OK, OR, PA, SC, SD, TN, TX, UT, VA, WA, WV, WI, WY.

The screenshot shows a 'Send Message To Lender' contact form. The form has a title bar 'Send Message To Lender' with a close button. The main heading is 'Contact Form'. Below the heading, there are four input fields: 'From:' with the value 'noreply@appone.net', 'To:' with the value 'rvfinancing@ally.com', 'Subject:' with the value 'Message from AppOne Dealer', and 'Message:' with a large text area. At the bottom of the form is a 'Send Message' button.

Mark Deal Dead

We updated the portal so that the **Lenders** tab does not display **Mark Dead** and **Mark Active** buttons for an RMS deal with a status of **Docs Received** or greater. Once an RMS deal has been **Docs Received**, the dealer must contact AppOne Staff member to mark the deal dead OR to re-activate it.

New Alert - Upcoming Release Notification

We added a new alert, **Upcoming Release Notification**, which allows lenders and portal users (both dealers and organization users) to subscribe to the release notification that are sent out with each sprint. Portal users can subscribe to the alert through the **ADMIN CONSOLE My Lenders** page.

Alert Name	Description	Recipient Addresses	Modified
App Status Change	Application Status Change	Kyle.Marthaler@wolterskluwer.Com	kmtestrecia 9/24/2015 11:08 AM
Lender Callback Status Change	Lender Callback Status Change	Kyle.Marthaler@wolterskluwer.Com	kmtestrecia 9/24/2015 11:29 AM
Failed Fax Transmissions	This alert will be triggered when a fax application transmission has failed.		edgetestuser 10/20/2015 10:08 PM
System Downtime Notification	Configure this alert to be notified of planned and un-planned system outages & issues.		kmtestrecia 9/24/2015 11:00 AM
Upcoming Release Notification	Subscribe to this alert to receive advance notification of system changes being undertaken as part of each platform release. Our platform releases usually comprise of 3 Sprints of 3 weeks duration to each Sprint.	Dustin.Naquin@wolterskluwer.Com	dustin.naquin 4/20/2016 8:51 AM

Online Credit Application

We implemented a new, mobile-friendly online consumer online credit application. The application leads the user through a series of pages to enter personal and collateral information and to submit the application.

Online Application

The first page of the online credit application has three questions.

Online Credit Application for DO NOT TOUCH IWP Sales LA

123 Some Dealership St., Dealership City, LA 70801. Phone: 000-000-1234, Fax: 866-422-9910

Are you applying jointly with another individual? ☒ NO

Do you know which unit you are interested in purchasing? ☒ NO

Do you have a unit that you will be trading in? ☒ NO

Next >

Question	If Yes ...
Are you applying jointly with another individual?	The user is prompted with screens to enter secondary applicant information.
Do you know which unit you are interested in purchasing?	The user is prompted with screens to enter collateral information. Note: You can now link collateral information from your dealership inventory website into the online credit application. Follow the instructions below to do this.
Do you have a unit that you will be trading in?-	The user is prompted with screens to enter trade-in information.

Applicants navigate through the application using the **Back** and **Next** buttons at the bottom of the page.

1

2

3

4

5

Primary Applicant

Secondary Applicant

Collateral

Trade-In

Confirm & Submit

Fred Borrower - Current Employment

Please enter the current employment information for Fred. All **bold *** fields are required.

Status *

Employed

Occupation *

job

Employer Name *

boss

Gross Salary *

\$

3500.00

Work Phone *

Monthly

999-999-9999

How Long *

10

 years

0

 months

Address

Zip Code

City

State

Does Fred have a secondary job/employment with a minimum of 1 year tenure?

NO

Does Fred have any other sources of income? (e.g. Alimony, Child Support, etc.)

NO

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.

< Back

Next >

The top navigation bar shows progress through application areas. Green nodes with checkmarks indicate completed areas. A blue node indicates the current area.

Online Credit Application for DO NOT TOUCH IWP Sales LA
123 Some Dealership St., Dealership City, LA 70801. Phone: 000-000-1235. Fax: 866-422-7889

✓

✓

✓

4

5

Primary Applicant
Secondary Applicant
Collateral
Trade-In
Confirm & Submit

Trade-In

Please enter the information for the unit you are looking to trade in below. All **bold** * fields are required.

Year *

Make *

Model *

2014

OldMake

OldModel

The final **Confirm & Submit** page includes summaries of applicant, collateral, and trade-in information. Before submitting, the applicant can change information by clicking one of the **edit** links. The applicant can print the application by clicking the printer icon.

Online Credit Application for DO NOT TOUCH IWP Sales LA
123 Some Dealership St., Dealership City, LA 70801. Phone: 000-000-1235. Fax: 866-422-7889

✓


✓

✓

✓

5

Primary Applicant
Secondary Applicant
Collateral
Trade-In
Confirm & Submit



Primary Applicant

Name: **Mary Borrower**
Date of Birth: 03/03/1987
SSN: ***-**-9999

Current Residence: 55 5th, Minneapolis, MN, 55409 (\$1,200.00 / month)

Current Employment: **job, boss** (\$3,500.00 / month)

Edit
Edit
Edit

Secondary Applicant

Name: **Bill Borrower**
Date of Birth: 02/02/1987
SSN: ***-**-9999

Current Residence: 55 5th, Minneapolis, MN, 55409 (\$1,200.00 / month)

Current Employment: **job, boss** (\$120,000.00 / year)

Edit
Edit
Edit

Collateral


2016 AUDI A6-V6 Sedan 4D 3.0T Premium Plus AWD

Edit

Trade-In

2012 Make Model

Edit


Wolters Kluwer
Financial Services

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The applicant submits the application by completing the **Enter Your Full Name** field and clicking the **Submit Online Application** button.

Legal Disclosure

You agree that your telephone communications with us and any financial company that reviews this credit application may be monitored and/or recorded to assure the quality of service. You give your consent to receive calls and text messages from the creditor or its third party debt collector at any number you have given us in this credit application or in the future; including calls and messages made using an auto dialer or prerecorded message, even if the telephone number is a cell phone number or other wireless device and the contact or message results in a charge to you. You agree that we can send disclosures or other communications to you electronically at the e-mail address you have given us.


IMPORTANT APPLICANT INFORMATION: Federal law requires financial companies to obtain sufficient information to verify your identity. You may be asked several questions and to provide one or more forms of identification to fulfill this requirement. In some instances we may use outside sources to confirm the information.

Enter Your Full Name *

By entering your name above & submitting this application, you agree to provide your electronic signature & consent to the terms outlined above. Upon successful submission of this application, you will receive an email with a link to download a copy of the completed credit application for your records. If you do not wish to electronically sign & submit this application online, you may print the credit application (by clicking on the printer icon above) and manually sign and submit it offline.

Sales Person Name (optional)

Notes to Dealer (optional)



Submit Online Application

The application appears immediately on the dealer portal.

Setting up the online credit application

Set up the online credit application feature on the **ADMIN CONSOLE Online Credit App** page. To complete set-up:

1. Check the **Enable the Online Credit App feature for my dealership** box.
2. Fill in the **Unique Website Folder Name**
3. Fill in the **Notification Email Addresses**.
4. Select a **Website Theme**.

5. Click the link to generate the script for embedding collateral values in the URL.

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

Online Credit App

☒ Enable the Online Credit App feature for my dealership

Unique Website Folder Name: e.g. abcmotors, jakesrvworld, etc. <https://test.appone.net/CreditApp/test7737>

Notification Email Addresses: 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.

Website Theme: [Preview](#)

[Click here to customize and/or embed collateral information from your inventory website into the online credit application URL](#)

6. To customize or embed collateral information, select **Collateral Type** and **Display Credit App In** options, then click **Generate Script**. You will need to provide this script to your website developer to link from your inventory page.

Generate Collateral Options Script

Collateral Type: ☒ Non-Marine ☐ Marine

Display Credit App In: ☒ New Window ☐ Current Window

Script: [Select/Copy](#)

```
<script type='text/javascript'>
function AppOne_OpenCreditApp(showHeader, unitType, stockNumber, vin, age, year, make, model, bodyStyle, mileage,
conversionSN, conversionAge, conversionYear, conversionMake, conversionModel) {
// Age values (0 = New, 1 = Used)
// UnitType values (0 = Auto, 1 = Powersports - Motorcycle, 2 = Marine, 3 = RV, 5 = Powersports - ATV, 7 = Trucks -
Commercial, 15 = Powersports - Personal Watercraft, 18 = Trailers, 20 = Powersports - UTV/Side-by-Side, 23 = Piano, 24
= Auto - Classic Cars, 25 = Auto - Conversion, 26 = Powersports - Snowmobiles, 27 = Powersports - Side Cars, 28 =
Powersports - Trailers)
// Pass null for parameters that are not being passed in
// If there is not a conversion package or trike kit, the conversion parameters do not need to be passed in.
// Usage Examples: <a href="javascript:AppOne_OpenCreditApp(true, 0, 'A123', null, 1, 2015, 'Honda', 'Civic')">Loan
Application</a>
```

Instructions:

- Make your selections above on how you want to link/embed our online credit application into your website and then click on the Generate Script button.
- Once the script has been generated, click on the Select/Copy link to copy the script code snippet and provide that to the developer for your dealership website.

7. Click **Save**.

Print Credit App

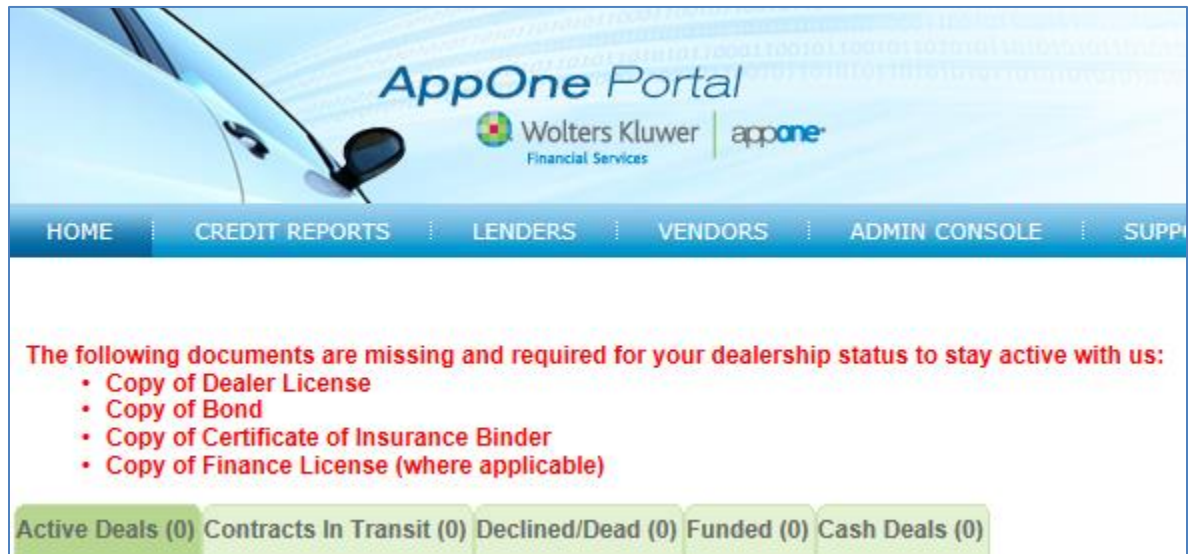
Due to user requests, we added a **Print Credit Application** button to the **Customer** and **Collateral** tabs (The **Lender** and **Forms** tabs already have **Print Credit Application** buttons). The **Print Credit Application** button appears on the **Customer** tab after information is saved. When the button is pressed on any tab, the portal prints a credit application based on the collateral and the customer's current state.

The screenshot shows the AppOne Portal interface. The top navigation bar includes links for HOME, CREDIT REPORTS, LENDERS, VENDORS, ADMIN CONSOLE, SUPPORT, and ANNOUNCEMENTS. Below this, a sub-navigation bar shows tabs for Customer, Credit Bureau, Collateral, Structure, Lenders, Forms, Notes, and E-Files. The 'Customer' tab is active. In the top right corner, it displays 'App ID: 1324047' and 'Customer Name: HENRY TESTCO'. Below the tabs, there is a green bar with buttons: 'Print Credit Application' (highlighted with a red box), 'Clone Application', 'Save', and 'Proceed To Next Step >>'. Below this bar, there is a section for 'Cash Deal' with a dropdown for 'Application Type' set to '1 Individual'. The main form area is titled 'Applicant #1 - Personal Information (MUST MATCH DRIVER'S LICENSE)' and contains fields for FName (HENRY), MName, LName (TESTCO), Suffix, SSN (482-39-4238), and DOB (05/05/1981).

The screenshot shows the AppOne Portal interface with the 'Collateral' tab active. The top navigation bar and sub-navigation bar are the same as in the previous screenshot. The 'Collateral' tab is highlighted. In the top right corner, it displays 'App ID: 1324047' and 'Customer Name: HENRY TESTCO'. Below the tabs, there is a green bar with buttons: 'Print Credit Application' (highlighted with a red box), 'Clone Application', 'Save', and 'Proceed To Next Step >>'. Below this bar, there is a section for 'Collateral Information'. It includes a dropdown for 'Collateral Type' set to 'RV' with a note 'Includes motorized & towable recreational vehicles.'. Below this, there are fields for 'Type' (Used), 'Year' (2010), 'Class Type' (CLASS A), 'Make' (HONDA), 'Length' (1234), 'MSRP' (\$8,600.00), 'Dealer Cost/Invoice' (\$12,000.00), 'Serial Number' (48935789234758934), 'Model' (HONDA ACCORD), and 'Mileage' (23,000). On the right side, there is a section for 'Dealer Installed Options' with a table for 'Option Name' and 'Selling Price' (currently \$0.00) and an 'Add Option' button.

Refresh Docs Reminder

We established a notice to remind Independent Automotive dealers who are missing documents required to maintain an active RMS dealership status. When one or more documents are needed, a message listing the documents appears on the Home page.

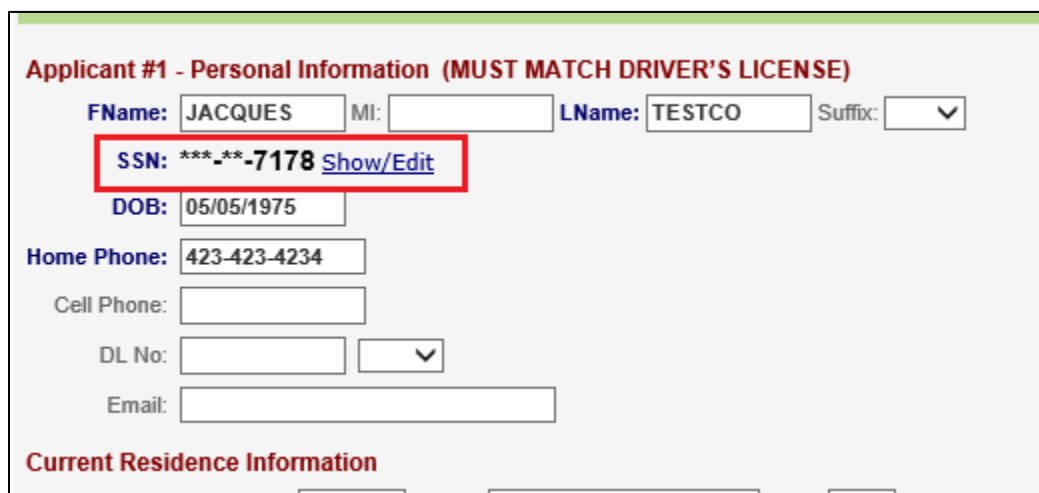


The screenshot shows the AppOne Portal interface. At the top, there's a header with the AppOne Portal logo and Wolters Kluwer Financial Services branding. Below the header is a navigation bar with links: HOME, CREDIT REPORTS, LENDERS, VENDORS, ADMIN CONSOLE, and SUPP. The main content area features a red alert message: "The following documents are missing and required for your dealership status to stay active with us:". Below this message is a bulleted list of missing documents: Copy of Dealer License, Copy of Bond, Copy of Certificate of Insurance Binder, and Copy of Finance License (where applicable). At the bottom of the alert area, there are several green buttons labeled: Active Deals (0), Contracts In Transit (0), Declined/Dead (0), Funded (0), and Cash Deals (0).

SSN Masking

We updated the portal to mask the first 5 digits of the social security number (for example, ***-**-*333) and added a **Show/Edit** link that unmask the digits and allows the user to edit them.

Customer tab



The screenshot shows a form titled "Applicant #1 - Personal Information (MUST MATCH DRIVER'S LICENSE)". The form contains several input fields: FName: JACQUES, MI: (empty), LName: TESTCO, Suffix: (dropdown menu), SSN: ***-**-7178 (with a red box around it and a "Show/Edit" link), DOB: 05/05/1975, Home Phone: 423-423-4234, Cell Phone: (empty), DL No: (empty), and Email: (empty). Below the SSN field, there is a section titled "Current Residence Information" with some partially visible input fields.

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