



AppOne

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September 2015

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Add New Lenders - Caching Issue/Max Insurance Deductible

We made the following changes:

- Corrected an issue that prevented dealers from creating a Fax lender and immediately submitting a deal to that lender. The dealer can now submit deals to newly added Fax lenders.
- Added a **Maximum Deductible** field for non-integrated lenders. The value appears in the retail installment contract and dealers have requested the ability to configure it.

Maximum Deductible field on the Add New Lender dialog

The screenshot shows a software dialog box titled "Add New Lender". It contains several sections for data entry:

- Lender Information:** Includes fields for "Lender Name:" and "Credit App Fax #:".
- LienHolder Information:** Includes fields for "Name:", "State Lien Holder Code:", "Phone:", "Address1:", "Address2:", and a "Zip / City / State:" dropdown.
- Insurance (Loss Payee) Information:** Includes fields for "Name:", "Address1:", "Address2:", and a "Zip / City / State:" dropdown. There is a checkbox labeled "Same as above".
- Additional Information:** Includes dropdowns for "Contract Accrual Disclosure:" and "Calculation Method:". The "Maximum Deductible:" field is highlighted with a red rectangle.

At the bottom right of the dialog are "Save" and "Cancel" buttons.

Maximum Deductible on the Retail Installment Contract

<p><input type="checkbox"/> A nonrefundable Waste Tire Fee of \$ <u>0.00</u></p> <p><input type="checkbox"/> An additional <input type="checkbox"/> refundable <input type="checkbox"/> nonrefundable fee of \$ <u>0.00</u></p> <p>These fees will be <input type="checkbox"/> paid in cash. <input type="checkbox"/> financed over the term of the Contract.</p> <p><input type="checkbox"/> paid proportionally with each payment.</p> <p>Itemization of Amount Financed</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">a. Cash Price of Vehicle, etc. (incl. sales tax of \$ <u>1,500.00</u>)</td> <td style="width: 40%; text-align: right;">\$ <u>16,500.00</u></td> </tr> <tr> <td>b. Trade-in allowance</td> <td style="text-align: right;">\$ <u>0.00</u></td> </tr> <tr> <td>c. Less: Amount owing, paid to (includes k): <u>N/A</u></td> <td style="text-align: right;">\$ <u>0.00</u></td> </tr> <tr> <td>d. Net trade-in (b-c; if negative, enter \$0 here and enter the amount on line k)</td> <td style="text-align: right;">\$ <u>0.00</u></td> </tr> <tr> <td>e. Cash payment</td> <td style="text-align: right;">\$ <u>0.00</u></td> </tr> <tr> <td>f. Manufacturer's rebate</td> <td style="text-align: right;">\$ <u>0.00</u></td> </tr> <tr> <td>g. Deferred down payment</td> <td style="text-align: right;">\$ <u>0.00</u></td> </tr> <tr> <td>h. Other down payment (describe) <u>N/A</u></td> <td style="text-align: right;">\$ <u>0.00</u></td> </tr> <tr> <td>i. Down Payment (d+e+f+g+h)</td> <td style="text-align: right;">\$ <u>0.00</u></td> </tr> <tr> <td>j. Unpaid balance of Cash Price (a-i)</td> <td style="text-align: right;">\$ <u>16,500.00</u></td> </tr> <tr> <td>k. Financed trade-in balance (see line d)</td> <td style="text-align: right;">\$ <u>0.00</u></td> </tr> <tr> <td>l. Paid to public officials, including filing fees</td> <td style="text-align: right;">\$ <u>0.00</u></td> </tr> <tr> <td>m. Insurance premiums paid to insurance company(ies)</td> <td style="text-align: right;">\$ <u>0.00</u></td> </tr> <tr> <td>n. Service Contract, paid to: <u>N/A</u></td> <td style="text-align: right;">\$ <u>0.00</u></td> </tr> <tr> <td>o. Documentation Fee paid to Seller</td> <td style="text-align: right;">\$ <u>70.00</u></td> </tr> <tr> <td>p. <u>N/A</u></td> <td style="text-align: right;">\$ <u>0.00</u></td> </tr> </table>	a. Cash Price of Vehicle, etc. (incl. sales tax of \$ <u>1,500.00</u>)	\$ <u>16,500.00</u>	b. Trade-in allowance	\$ <u>0.00</u>	c. Less: Amount owing, paid to (includes k): <u>N/A</u>	\$ <u>0.00</u>	d. Net trade-in (b-c; if negative, enter \$0 here and enter the amount on line k)	\$ <u>0.00</u>	e. Cash payment	\$ <u>0.00</u>	f. Manufacturer's rebate	\$ <u>0.00</u>	g. Deferred down payment	\$ <u>0.00</u>	h. Other down payment (describe) <u>N/A</u>	\$ <u>0.00</u>	i. Down Payment (d+e+f+g+h)	\$ <u>0.00</u>	j. Unpaid balance of Cash Price (a-i)	\$ <u>16,500.00</u>	k. Financed trade-in balance (see line d)	\$ <u>0.00</u>	l. Paid to public officials, including filing fees	\$ <u>0.00</u>	m. Insurance premiums paid to insurance company(ies)	\$ <u>0.00</u>	n. Service Contract, paid to: <u>N/A</u>	\$ <u>0.00</u>	o. Documentation Fee paid to Seller	\$ <u>70.00</u>	p. <u>N/A</u>	\$ <u>0.00</u>	<p>Your signature below means you want (only) the insurance coverage(s) quoted above. If "None" is checked, you have declined the coverage we offered.</p> <p style="text-align: right;">05/05/1988</p> <p>By: <u>BEN TESTCO</u> DOB</p> <p style="text-align: right;">N/A</p> <p>By: <u>N/A</u> DOB</p> <p style="text-align: right;">N/A</p> <p>By: <u>N/A</u> DOB</p> <p>Property Insurance. You must insure the Property. You may purchase or provide the insurance through any insurance company reasonably acceptable to us. The collision coverage deductible may not exceed \$ <u>500.00</u>. If you get insurance from or through us you will pay \$ <u>0.00</u> for <u>N/A</u> of coverage.</p> <p>This premium is calculated as follows:</p> <p><input type="checkbox"/> \$ <u>0.00</u> Deductible, Collision Cov. \$ <u>0.00</u></p> <p><input type="checkbox"/> \$ <u>0.00</u> Deductible, Comprehensive \$ <u>0.00</u></p> <p><input type="checkbox"/> Fire-Theft and Combined Additional Cov. \$ <u>0.00</u></p> <p><input type="checkbox"/> <u>N/A</u> \$ <u>0.00</u></p> <p><input type="checkbox"/> Liability insurance is provided or obtained by Seller.</p>
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Business Application Submission Filters

The portal was updated to prevent dealers from submitting business applications to lenders that do not accept these applications. Filters were added for the following lenders:

- Bank of America
- Banterra
- Business Bank of Saint Louis
- MarineOne
- MB Finance
- Medallion
- Merrick

Bank of America

	BOA Marine Indirect
Collateral Age	✓
Boat Collateral	✓
Collateral Mileage	✓
Business Application	✗
Down Payment	n/a
Min Loan Amount	n/a
Lending Area	n/a
Max Loan Amount	n/a
Max Advance	n/a
Income	n/a
FICO Score	n/a
Notes	-
SELECT LENDER	<input type="checkbox"/>
	<input type="button" value="Manual Print"/>

Bank of America does not accept business applications via AppOne currently.

Banterra

Integrated Lenders

	Banterra Bank RV Program
FICO Score	✗
Down Payment	✗
Lending Area	✓
Income	✗
Banterra Bank does not accept business applications via AppOne currently.	
Business Application	✗
Notes	-
SELECT LENDER	<input type="checkbox"/>
	<input type="button" value="Manual Print"/>

Business Bank of Saint Louis

Integrated Lenders

	The Business Bank Recreational Program
FICO Score	?
Business Application	✗
Notes	-
SELECT LENDER	<input type="checkbox"/>
	-

Business Bank of St. Louis does not accept business applications via AppOne currently.

MarineOne

	Marine One Motorhome Program
FICO Score	✗
Down Payment	✗
Min Loan Amount	✓
Max Loan Amount	✓
Lending Area	✓
Max Advance	✓
Income	✗
Collateral	✓
Business Application	✗
Collateral Age	n/a

MarineOne does not accept business applications via AppOne currently.

MB Finance

Integrated Lenders

	MBF Motorcycle Indirect
FICO Score	✓
Time on Credit File	✓
# of Tradelines	✓
Job Time	✗
Residence Time	✓
Business Application	✗
Notes	-
SELECT LENDER	<input type="checkbox"/>
	-

MB Finance does not accept business applications via AppOne currently.

Medallion

Medallion – RV	
Collateral Age	✓
Boat Collateral	n/a
Collateral Mileage	n/a
Down Payment	✗
Min Loan Amount	✓
Lending Area	✗
Max Loan Amount	✓
Max Advance	✓
Business Application	✗
Income	✓
FICO Score	✗
Notes	-
SELECT LENDER	<input type="checkbox"/>
	-

Medallion Bank does not accept business applications via AppOne currently.

Merrick

Integrated Lenders	
Merrick - MotorCycle	
FICO Score	n/a
Time on Credit File	n/a
# of Tradelines	n/a
Job Time	n/a
Residence Time	n/a
Business Application	✗
Notes	-
SELECT LENDER	<input type="checkbox"/>
	-

Merrick Bank cannot process business applications through AppOne currently.

Forms Tab - Editing Lien Holder Information

The portal was updated to restrict the ability to edit lienholder information on the Forms tab.

- When the lienholder is one of the following Ally programs, a drop-down list allows the dealer to select the lienholder name:
 - Ally RV
 - RV Express
 - Commercial Truck Commercial Auto

The dealer must make a selection before printing forms.

- For other AppOne integrated lenders, the lienholder and insurance information cannot be edited from the Forms tab.

- When the lienholder is a nonintegrated, non-AppOne lender, all lienholder and insurance fields are editable.

Lenders Tab - Save Button

A **Save** button was added to the Lenders page and appears in the button toolbar if one or more transmissions has been sent or if manual callback is enabled.

Merrick Withdrawn Callbacks

We updated the handling of applications that are withdrawn by Merrick. AppOne now marks these applications as declined, and they appear on the lender callback with a Decision status of **Declined**. The callback **Notes** field and the decision dialog show the reason as **Withdrawn**.

Lender:	Merrick - RV/HT
Transmission Status:	COMPLETED 9/11/2015 03:12 PM (kmtestrecla)
Lender ApplID:	5131126
Analyst Name:	-
Analyst Phone:	-
Decision:	DECLINED 9/11/2015 3:22 PM
Expiration Date:	
Buy Rate:	-
Max Rate:	-
Max Term:	72 mths
Max Advance:	\$28,274.24
Max Loan Amount:	-
Max Payment:	-
Max VSC:	-
Max GAP:	-
Max Back-End:	-
Min Cash Down:	-
Acq Fee:	-
Trade Equity:	-
Special Stips:	
Submit Notes to Lender:	-
Notes:	WITHDRAWN BY LENDER, .
SELECT CALLBACK:	-

https://testappone.net/?enc=mVvpNEMrJkPWuPOX4UVTmi9nZd5UmEYYSQuYagW89nN+2RkG+YCOld4Ghox90hc...

Lender: Merrick Bank

Dealer Name: DO NOT TOUCH IWP Sales LA Customer Name: JAMIE TESTCO

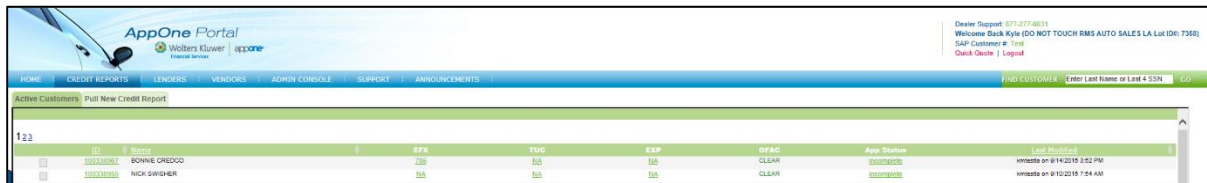
App #: 1309018 Transmission #: 100714440 Decision: DECLINED
 Lender ApplID: 5131126 Analyst Name: - Analyst Phone #: -
 Tier: -

Reasons Declined:
 • WITHDRAWN BY LENDER, .

Notes:

New Deal Top Level Credit Report Tab Saving

We corrected an issue that caused duplicate customer records to be created on the top-level **Credit Reports** tab. Previously, a record was created for every application submitted. Now, a credit report shows up on the top-level Credit Reports tab only if the dealer pulled a credit report manually from the top-level tab.

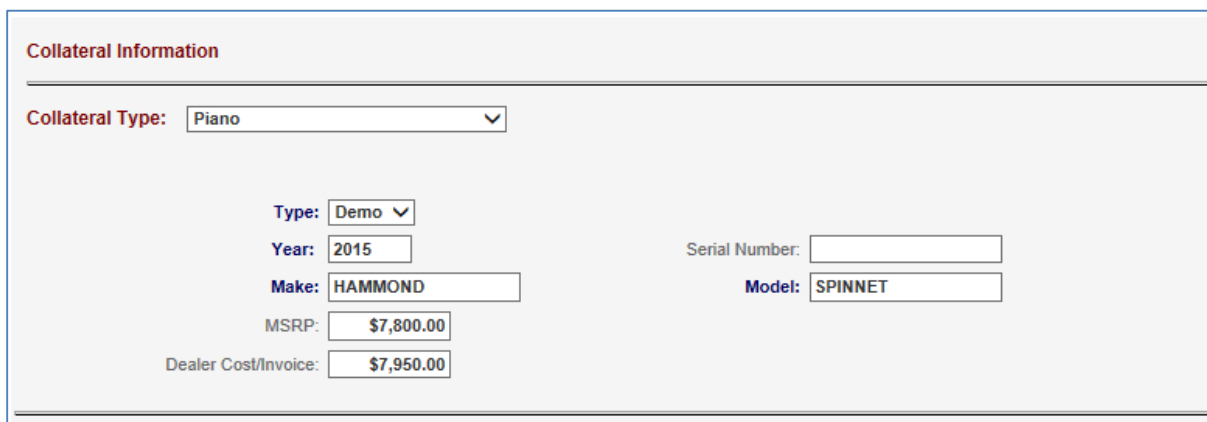


The screenshot shows the AppOne Portal interface. At the top, there's a navigation bar with links like HOME, CREDIT REPORTS, LENDERS, VENDORS, ADMIN CONSOLE, SUPPORT, and ANNOUNCEMENTS. Below this, there's a section titled 'Active Customers' with a 'Pull New Credit Report' button. A table lists two customers: BONNIE CREDO and NICK SWISHER. The table has columns for ID, Name, SFX, TMS, EXP, DPAG, App Status, and Last Modified. The last modified dates are 9/14/2015 3:52 PM and 9/10/2015 7:54 AM.

ID	Name	SFX	TMS	EXP	DPAG	App Status	Last Modified
12345678	BONNIE CREDO	239	SA	SA	CLEAR	APPROVED	9/14/2015 3:52 PM
12345679	NICK SWISHER	SA	SA	SA	CLEAR	APPROVED	9/10/2015 7:54 AM

Piano Collateral

The **Collateral** tab was updated for **Piano** collateral. The **Mileage** field was removed. Both **MSRP** and **Invoice/Cost** fields appear. The dealer must enter at least one value if entering collateral manually. All **Type** values save correctly, including **Demo**.



The screenshot shows the 'Collateral Information' form. It has a 'Collateral Type' dropdown set to 'Piano'. Below this, there are several input fields: 'Type' (set to 'Demo'), 'Year' (set to '2015'), 'Make' (set to 'HAMMOND'), 'Model' (set to 'SPINET'), 'MSRP' (set to '\$7,800.00'), and 'Dealer Cost/Invoice' (set to '\$7,950.00'). There are also 'Serial Number' and 'Clear' buttons.

Collateral Information

Collateral Type:

Type:

Year:

Make:

Model:

MSRP:

Dealer Cost/Invoice:

Serial Number:

Portal Convergence Updates

The following updates were made:

- A **Save & Print Forms** button was added to the **Structure** tab.
- A confirmation message was added to the **Forms** tab prompting users to enter the VIN or serial number before printing forms.
- A **Contact Date** field was added to the **Forms** tab. It appears after a lender has been selected.
- A **Clone** button was added to the **Customer**, **Collateral**, **Structure**, and **Lender** tabs.

Save & Print Forms button

App ID: 1308313 Customer Name: JENNY CREDCO

Structure Lenders Forms Notes E-Files BETA

Clone Application Save Save & Print Forms

VIN prompt

App ID: 1308313 Customer Name: JENNY CREDCO

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

Print Adverse Action Print Risk Based Pricing Notice Print Credit Application

Save Print Selected Forms ☐ Also Save to E-Files BETA

Integrated Lender Forms

<input checked="" type="checkbox"/> Generic Funding Cover Sheet for MVM/GSM	<input checked="" type="checkbox"/> Bank of America Delivery Receipt and Storage Agreement	<input checked="" type="checkbox"/> Bank of America Retail Installment Contract for Consignment and Arkansas - Marine and RV
<input checked="" type="checkbox"/> Bank of America Credit Application - Applicants 1 & 2	<input checked="" type="checkbox"/> Bank of America Memorandum of Acceptance (RV)	
<input checked="" type="checkbox"/> Bank of America Customer Identification Verification Form - Applicants 1 - 2	<input checked="" type="checkbox"/> Odometer Disclosure Statement (General)	
<input checked="" type="checkbox"/> Bank of America Certificate of Financial Statement	<input checked="" type="checkbox"/> Agreement to Provide Insurance (General)	
<input checked="" type="checkbox"/> Bank of America Power of Attorney	<input checked="" type="checkbox"/> Buyers Order (Louisiana) Rev. 10/31/2010	

Confirmation Dialog

The VIN/Serial # has not yet been entered for the unit. Would you like to go to the Collateral tab to enter the VIN/Serial # before printing forms?

YES NO

Forms tab Contact Date field

App ID: 1308313 Customer Name: JENNY CREDCO

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

Print Adverse Action Print Risk Based Pricing Notice Print Credit Application

Save Print Selected Forms ☐ Also Save to E-Files BETA

Integrated Lender Forms

<input checked="" type="checkbox"/> Generic Funding Cover Sheet for MVM/GSM	<input checked="" type="checkbox"/> Bank of America Delivery Receipt and Storage Agreement	<input checked="" type="checkbox"/> Bank of America Retail Installment Contract for Consignment and Arkansas - Marine and RV
<input checked="" type="checkbox"/> Bank of America Credit Application - Applicants 1 & 2	<input checked="" type="checkbox"/> Bank of America Memorandum of Acceptance (RV)	<input checked="" type="checkbox"/> Motor Vehicle Title Application (Louisiana) Rev. 05/31/2012
<input checked="" type="checkbox"/> Bank of America Customer Identification Verification Form - Applicants 1 - 2	<input checked="" type="checkbox"/> Odometer Disclosure Statement (General)	<input checked="" type="checkbox"/> Bank of America ACH Form
<input checked="" type="checkbox"/> Bank of America Certificate of Financial Statement	<input checked="" type="checkbox"/> Agreement to Provide Insurance (General)	<input checked="" type="checkbox"/> Bank of America Funding Checklist (Rev. 06/2015)
<input checked="" type="checkbox"/> Bank of America Power of Attorney	<input checked="" type="checkbox"/> Buyers Order (Louisiana) Rev. 10/31/2010	<input checked="" type="checkbox"/> Bank of America Guarantee of Lien

Select All Un-Select All

Deal Information

Contact Date: 05/20/2014

Clone Application button

AppOne Portal
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Financial Services

HOME CREDIT REPORTS LENDERS VENDORS ADMIN CONSOLE SUPPORT ANNOUNCEMENTS

App ID: 1308313 Customer Name: JENNY CREDCO

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

Refresh Add Note Mark In-Transit Mark Dead Submit To Lenders Clone Application

Lender:	BOA RV Consignment ✓
Transmission Status:	COMPLETED 07/14/2014 07:10 PM EST

Previous Employment Optional Fields

The **Gross Salary** and **Work Phone** fields for Previous Employment were made optional. Applications can now be submitted and transmitted to lenders without a salary or work phone number for previous employment.

Current Employment Information		
Status:	employed ▼	
Occupation:	JOB	
Employer Name:	BOSS	
Address:		
Zip/City/State:		▼
Gross Salary:	\$2,000 / Monthly ▼	
Work Phone:	612-876-8765	
How Long?	1 years 6 months	
<input type="checkbox"/> Click Here To Enter a Second Job		
Previous Employment Information (If less than 2 years at current job)		
Status:	employed ▼	
Occupation:	OTHER JOB	
Employer Name:	OTHER BOSS	
Address:		
Zip/City/State:		▼
Gross Salary:	\$0 / ▼	
Work Phone:		
How Long?	5 years 0 months	

TESLA Auto Changes

We made the following updates:

- Made the VIN field optional when entering Auto collateral manually.
- Corrected an issue that prevented MSRP from transmitting correctly over the RouteOne DSP interface.

Vehicle Information

Collateral Type: **Includes automobiles**

Type: ☐ Certified Pre-Owned

VIN:

☒ **Enable Manual Entry**

Year:

Make:

Model:

Body Style:

Mileage:

Color:

MSRP:

Dealer Cost/Invoice:

Training Videos Button

Because the training videos are no longer being updated, the **Training Videos** button was removed from the upper, left corner of portal's Home page.

Tech Support: 877-277-6631

Welcome Back Rosalind (C.L. HANSON)

[Quick Quote](#) | [Logout](#)

FIND APP [GO](#)

[+ New Deal](#) [Refresh](#)

Submitted	Modified
rrtestclh 9/4/2015 4:29 PM	rrtestclh 9/4/2015 4:29 PM

Turn on Itemized Backend Products for GROW and Wells

We itemized backend product for GROW and Wells Fargo. In the example below, the Vehicle Service Contract and GAP will be itemized when submitted to GROW and Wells Fargo.

Back-End Products

[Click here for AppOne Integrated Product Providers](#)

☒ **Vehicle Service Contract** \$600.00

Company:

Coverage Term: ☐ Unlimited? Mileage: ☐ Unlimited?

Coverage Description:

Deductible:

Dealer Cost: Tax: ☐ Override

☒ **GAP** \$840.00

Company:

Coverage Term: ☐ Unlimited?

Coverage Description:

Dealer Cost:

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