



AppOne

**2015.5.1 Dealer Portal EXTERNAL Release
Notes**

January 2016

Publication Information / Version

Full Product Name: AppOne
Document Title: Dealer Portal EXTERNAL
Software Version Information: 2015.5.1
Document Version Information: 1.0
Release Date: January 2016

Distributed Subject to Terms of a License or other Agreement

The contents of this publication, including its appendices, exhibits, and other attachments, as updated or revised, are highly confidential and proprietary to Wolters Kluwer Financial Services, Inc. or its subsidiaries or affiliates (“Wolters Kluwer Financial Services”). This publication is distributed pursuant to a Non-Disclosure Agreement, Evaluation Agreement, License Agreement and/or other similar agreement(s) with Wolters Kluwer Financial Services, Inc. or its subsidiary or affiliate. Unless otherwise specifically provided in such agreement(s), the reproduction of this publication is strictly prohibited. Use and distribution of this publication are also subject to the responsibilities and obligations of such agreement(s), which require confidential treatment of this publication and its contents.

Information in this guide is subject to change without notice and does not represent a commitment on the part of Wolters Kluwer Financial Services.

Do Not Reproduce or Transmit

Unless otherwise specifically authorized in the agreement or license under which this publication has been provided, no part of this publication may be posted, played, transmitted, distributed, copied or reproduced in any form or by any means, electronic or mechanical, including photocopying, recording, or retaining on any information storage and retrieval system, without prior written permission from Wolters Kluwer Financial Services.

Requests for permission to reproduce content should be directed to Wolters Kluwer Financial Services, Inc., Corporate Legal Department, by telephone at 1-800-397-2341.

Not a Substitute for Legal Advice

This publication is intended to provide accurate and authoritative information about the subject matter covered based upon information available at the time of publication. Examples given in this publication are for illustrative purposes only.

Development of this publication and the software (including forms, disclosures, reports, and other documents generated by the software) or other products that it describes was based on Wolters Kluwer Financial Services' understanding of various laws, regulations and commentaries. Wolters Kluwer Financial Services cannot and does not guarantee that its understanding is correct.

This publication is not intended, and should not be used, as a substitute for legal, accounting, or other professional advice. Wolters Kluwer Financial Services is not engaged in providing legal, accounting or other professional services. If legal or other professional assistance is required, you should seek the services of a competent professional. We encourage you to seek the advice of your own attorney concerning all legal issues involving the use of this publication and any products described in this publication. If your interpretations or your counsel's interpretations are contrary to those expressed in this publication, you should of course, follow your/your counsel's interpretations.

The following notice is required by law:

WOLTERS KLUWER FINANCIAL SERVICES' PRODUCTS AND SERVICES ARE NOT A SUBSTITUTE FOR THE ADVICE OF AN ATTORNEY.

Warranty Disclaimer

Except only for the warranties (if any) expressly set forth in the agreement(s) under which this publication is provided (i.e., your agreement or license for the described product), this publication is provided “as is”, and Wolters Kluwer Financial Services makes no warranty, express, implied, by description, by sample or otherwise, and in particular and without limitation, makes no implied warranties of merchantability or fitness for purpose. No modifications to this Warranty Disclaimer are authorized unless in writing and signed by the President or a Vice President of the Wolters Kluwer Financial Services entity licensing the product described in this publication.

Attributions and Acknowledgements

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

AppOne® and DocOne® are the registered trademarks of Wolters Kluwer Financial Services, Inc. All other trademarks are the property of their respective owners.

Copyright Information

© 2015 Wolters Kluwer Financial Services, St. Cloud, Minnesota

This publication is the confidential information of Wolters Kluwer Financial Services. Distribution of this publication is subject to restrictions in the license or agreement under which this publication is provided to authorized Wolters Kluwer Financial Institution customers.

All rights reserved.

Table of Contents

Table of Contents iii

Add CBT GAP to additional states..... 1

Ally Commercial Truck - Enable Additional States 2

Ally Special Program Indicator 4

Correct FirstMerit zip code for RV & Marine Program 5

Non-Integrated Product issues..... 5

Powersports - Motorcycle with Trike 7


Vehicle Type Updates (Ally CT Request)..... 7

Ally Commercial Truck - Enable Additional States

We enabled the Ally Commercial Truck program for the states listed below. Dealerships in these states now have access to the Ally Commercial Truck program.

- Alaska
- Alabama
- Arkansas
- Colorado
- Connecticut
- District of Columbia
- Hawaii
- Iowa
- Idaho
- Indiana
- Kansas
- Kentucky
- Louisiana
- Maryland
- Maine
- Minnesota
- Missouri
- Mississippi
- Montana
- North Dakota
- Nebraska
- New Hampshire
- New Mexico
- Nevada
- Oklahoma
- Oregon
- Puerto Rico
- Rhode Island
- South Dakota
- Tennessee
- Utah
- Virginia
- Virgin Islands

- Vermont
- Washington
- Wisconsin
- West Virginia
- Wyoming



AppOne Portal
Wolters Kluwer Financial Services

Dealer Support: 877-277-6631
Welcome Back Ally (ALLY-IA, Lot ID#: 18664)
[Quick Guide](#) | [Logout](#)

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

FIND APP | | GO

App ID: 1010911 | Customer Name: TEST NEWSTATE

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

Clone Application | Save | Save & Print Forms

Collateral Information

Collateral Type: Trucks - Commercial Includes medium/heavy duty commercial trucks. Inventory Stock Number:

Type: VIN:
Year: Make:
Model: Body Style:
Mileage: Color:
MSRP: Book Value:

Collateral Options

Option Name	Cost Price	Selling Price	
<input type="text"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="button" value="Add Option"/>

☐ Conversion Package Details

Ally Special Program Indicator

An optional **Special Program Indicator** list was added to the Ally Commercial Truck program on the lender submission page. A dealer can, optionally, select one of the options from the list. If a special program is selected, the value is sent to Ally with the credit application.

Ally Commercial Truck	
Special Program Indicator	
Notes	ABC 36
SELECT LENDER	ABC 48
	ABC 60
	Balloon
	Certified Used
	Comtrac
	Credit Line
	Custom pay 6 months
	Custom pay annual
	Custom pay quarterly
	Customer Opinion Plan
	Electric veh retail
	Electric veh spike
	Employee Program
	Expatriate
	First Time Buyer - Smart Beginning
	i-MiEV-one payment
	i-MiEV-spike payment
	Lease Loyalty
	Lease to Retail
	Lemon_Buyback_Hail
	Medium Duty Diesel
	Military Sales Finance
	Multiple Units
Fax	Off Lease
Notes	Other
SELECT LENDER	Repair Program
	Residual Purchase Plan
	Volt - one payment

Correct FirstMerit zip code for RV & Marine Program

The zip code for the FirstMerit Bank, N.A. RV and FirstMerit Bank, N.A. Marine programs was corrected to **48502**. The correct zip code appears in the **Lien Holder Information** of the **Forms** tab and prints correctly on deal documents.

The screenshot shows the AppOne Portal interface for a "First Merit Marine Deal". The "Forms" tab is active, displaying the "Lien Holder Information" section. The "Name" field is "FirstMerit Bank, N.A.". The "Address" field is "328 S Saginaw". The "Zip / City / State" field is "48502 Flint MI". The "Phone" field is "866-599-2255". The "Fax" field is "866-599-2255". The "Calculation Method" is "30/360". The "Contract Accrual Disclosure" is "Actual/365". The "Insurance (Loss Payee) Information" section is also visible, showing the same information as the Lien Holder Information.

FIRST LIENHOLDER			CONTRACT DATE	REGISTRATION FEE	RE
FirstMerit Bank, N.A.			12/18/2015		
328 S Saginaw				CREDIT	TR
Flint, MI 48502				ADDITIONAL FEE	TI
SECOND LIENHOLDER			CONTRACT DATE	PRORATED FEE	LI
N/A			N/A		
N/A				SPECIAL FEE (1)	PE
				SPECIAL FEE (2)	PC
REVENUE OFFICE CITY	OFFICE NUMBER	COUNTY		SPECIAL FEE (3)	TO
ARKANSAS REVENUE AGENT			DATE	CTY CODE	SALES TAX RECEIPT NUM

Non-Integrated Product issues


We made the following updates related to non-integrated back-end products:

- Corrected an issue that prevented dealers from changing the **Selling Price** after saving.
- Corrected an issue that caused the **Selling Price** field to be disabled after a validation error.
- Corrected an issue that caused a second back-end product to collapse after a validation error on the first

After the updates, all non-integrated product fields remain enabled after saving and regardless of validation errors.

Selling Price field remains active after validation

Back-End Products

 **The following errors were found on this form:**

- Please enter the VSC Coverage Mileage.

☒ **Vehicle Service Contract**

900.00 x

Selling Price remains active

Company:

Coverage Term: ☒ Unlimited? Mileage: ☐ Unlimited?


Coverage Description:

Deductible:

Dealer Cost: Tax: ☒ Override

Second product does not collapse when first has a validation error

Back-End Products

 **The following errors were found on this form:**

- Please enter the VSC Coverage Mileage.

☒ **Vehicle Service Contract**

\$1,275.00

Company:

Coverage Term: ☐ Unlimited? Mileage: ☐ Unlimited?

Coverage Description:

Deductible:

Dealer Cost: Tax: ☐ Override

☒ **GAP**

\$2,000.00

Company:

Coverage Term: ☐ Unlimited?

Coverage Description:

Dealer Cost:

Powersports - Motorcycle with Trike

We added a **Trike Kit** checkbox to the **Collateral** tab which allows the dealer to itemize a trike kit separately from the motorcycle base unit. When the user checks the box, a NADA Book-Out button and set of trike kit fields open. The user can book out the trike kit through NADA or itemize components manually. The following components can be itemized:

- Serial
- Year
- Make
- Model
- MSRP
- Dealer Cost/Invoice

The screenshot displays the 'Collateral Information' form. At the top, 'Collateral Type' is set to 'Powersports - Motorcycle'. Below this is a 'NADA Book-Out' button. The form includes fields for 'Type' (set to 'New'), 'Year' (2016), 'Make' (MAKE), 'Mileage' (0), 'MSRP' (\$30,000.00), and 'Dealer Cost/Invoice' (\$0.00). To the right, there are fields for 'Fuel Type', 'VIN', and 'Model' (MODEL). A red rectangular box highlights the 'Trike Kit' section, which is currently checked. This section contains its own 'NADA Book-Out' button and fields for 'Serial', 'Year', 'Make', 'Model', 'MSRP' (\$0.00), and 'Dealer Cost/Invoice' (\$0.00).

Vehicle Type Updates (Ally CT Request)

We updated the **Collateral** tab to include **Certified Pre-Owned** and **Auction** boxes for when the **Type** is **Used**. When the **Collateral Type** is **Piano**, the **Certified Pre-Owned** box appears but the **Auction** box does not. When the **Collateral Type** is **Classic Car**, the **Auction** box appears but the **Certified Pre-Owned** box does not. For all other collateral types, when the **Type** is **Used**, both boxes appear. If the unit is a certified pre-owned unit, then users can check the appropriate box to indicate that to the lender. If the unit was purchased at an auction, then users can check the **Auction** checkbox to indicate that to the lender.

Auto

Vehicle Information	
<hr/>	
Collateral Type:	Auto <input type="text"/> Includes automobiles, light/medium duty trucks and vans.
Type:	<input type="text"/> Used <input type="checkbox"/> Certified Pre-Owned <input type="checkbox"/> Auction
VIN:	1n6ad07u66c407987
Mileage:	<input type="text"/>
<input type="button" value="Lookup"/>	<input type="checkbox"/> Enable Manual Entry
<hr/>	

Marine

Collateral Information	
<hr/>	
Collateral Type:	Marine <input type="text"/> Includes power boats, sail boats, outboard motors &
Boat Information	
<hr/>	
Type:	<input checked="" type="checkbox"/> Boat <input type="text"/> Used <input type="checkbox"/> Certified Pre-Owned <input type="checkbox"/> Auction
Year:	<input type="text"/>
Make:	<input type="text"/>
Model:	<input type="text"/>
Boat Length:	<input type="text"/>
Serial:	<input type="text"/>
Dealer Cost/Invoice:	<input type="text"/> \$0.00
MSRP:	<input type="text"/> \$0.00
Selling Price:	<input type="text"/> \$0.00

Commercial Trucks

Collateral Information	
Collateral Type: Trucks - Commercial Includes medium/heavy duty commercial trucks.	
Type: Used <input checked="" type="checkbox"/> Certified Pre-Owned <input type="checkbox"/> Auction	VIN: <input type="text"/>
Year: 2011	Make: COMMTRUCKMAKE
Model: COMMTRUCKMODEL	Body Style: <input type="text"/>
Mileage: 50,000	Color: <input type="text"/>
MSRP: \$0.00	Book Value: \$50,000.00
<input checked="" type="checkbox"/> Conversion Package Details	
Serial: <input type="text"/>	Year: 2011
Make: CONVMAKE	Model: CONVMODEL
Invoice/Cost: \$0.00	

Motorcycle

Collateral Information	
Collateral Type: Powersports - Motorcycle	
<input type="button" value="NADA Book-Out"/> <input type="button" value="Reset Vehicle"/>	
Type: Used <input checked="" type="checkbox"/> Certified Pre-Owned <input type="checkbox"/> Auction	Fuel Type: <input type="text"/>
Year: 2006	VIN: <input type="text"/>
Make: Suzuki	Model: GZ250K6
Mileage: 0	
MSRP: \$3,199.00	

Piano

Collateral Information	
Collateral Type: Piano	
Type: Used	<input checked="" type="checkbox"/> Certified Pre-Owned
Year: 2015	Serial Number:
Make: MAKE	Model: MODEL
MSRP: \$21,000.00	
Dealer Cost/Invoice: \$0.00	

Classic Cars

Vehicle Information	
Collateral Type: Auto - Classic Cars	
Type: Used	<input checked="" type="checkbox"/> Auction
VIN:	
Year: 1945	
Make: CLASSICMAKE	
Model: CLASSICMODEL	
Body Style: SEDAN	
Mileage: 150,000	
Color:	
MSRP: \$0.00	
Dealer Cost/Invoice: \$12,000.00	

About Wolters Kluwer Financial Services - Whether complying with regulatory requirements or managing financial transactions, addressing a single key risk, or working toward a holistic enterprise risk management strategy, Wolters Kluwer Financial Services works with more than 15,000 customers worldwide to help them successfully navigate regulatory complexity, optimize risk and financial performance, and manage data to support critical decisions. Wolters Kluwer Financial Services provides risk management, compliance, finance and audit solutions that help financial organizations improve efficiency and effectiveness across their enterprise. With more than 30 offices in 20 countries, the company's prominent brands include: AppOne®, ARC Logics®, AuthenticWeb™, Bankers Systems, Capital Changes, CASH Suite™, FRSGlobal, FinArch, GainsKeeper®, NILS®, TeamMate®, Uniform Forms™, and VMP® Mortgage Solutions. Wolters Kluwer Financial Services is part of Wolters Kluwer, a leading global information services and solutions provider with annual revenues of (2014) €3.6 billion (\$4.9 billion) and approximately 19,000 employees worldwide. Please visit our [website](http://WoltersKluwerFS.com) for more information.

Wolters Kluwer Financial Services
6815 Saukview Drive
St. Cloud, MN 56303
Toll-free: 800.274.2711

To learn more visit **WoltersKluwerFS.com.**

© 2015 Wolters Kluwer Financial Services, Inc. All Rights Reserved.