

Dealer Portal for RV

Quick Guide

July 2015

Preface

This publication was written for AppOne

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Introducing the New Dealer Portal

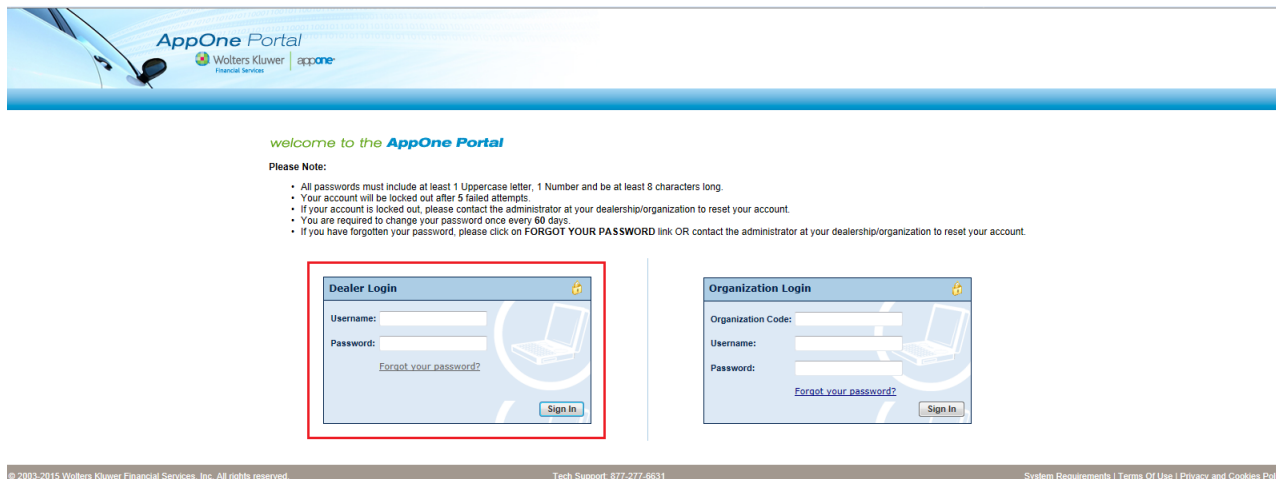
Welcome to the new AppOne dealer portal. To log in, go to <https://gateway.appone.net/dealer/>.

Dealer Login

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

Note:

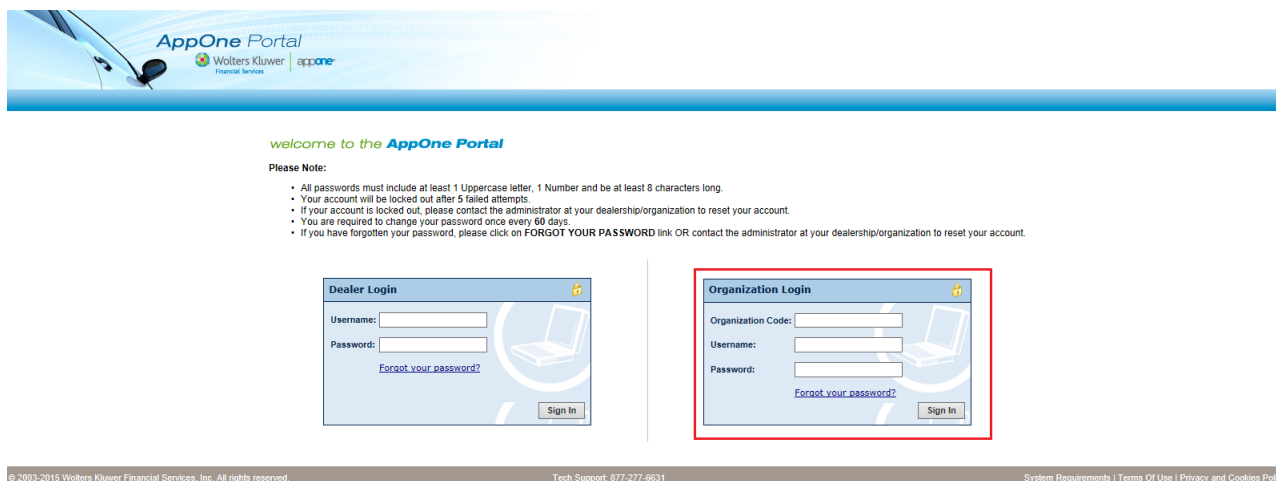
Always use the left side, **Dealer Login** area if you are logging in from a dealership.



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 is also visible, containing fields for "Organization Code:", "Username:", "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 instance, 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. All other elements, including the header, welcome message, notes, and footer, remain the same.

AppOne's Recent Enhancements

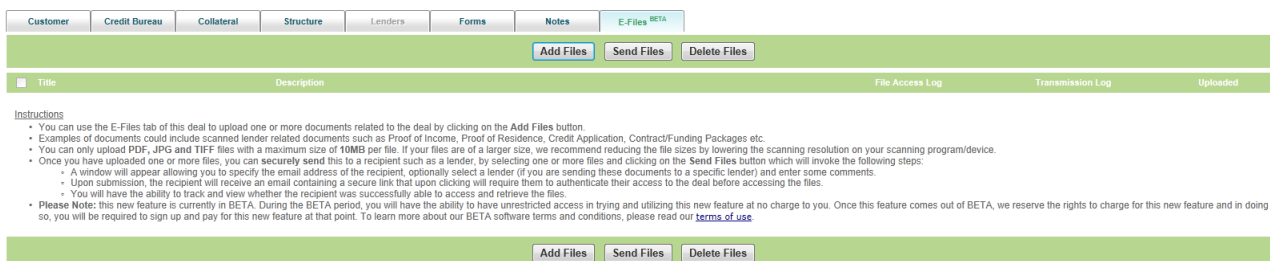
- Create documents for a cash deal—do all your deals on AppOne by subscribing to AppOne on the **Admin Console** tab.
- Copy applicant information with the click of a button, saving you keystrokes.



Application Type: 2 Individuals

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

- 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

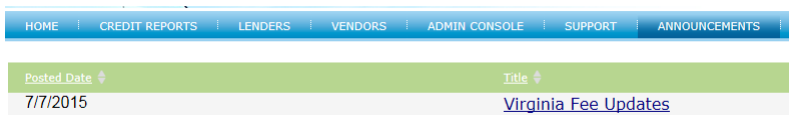
■ Title Description File Access Log Transmission Log Uploaded

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

- 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 Virginia Fee Updates

- 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

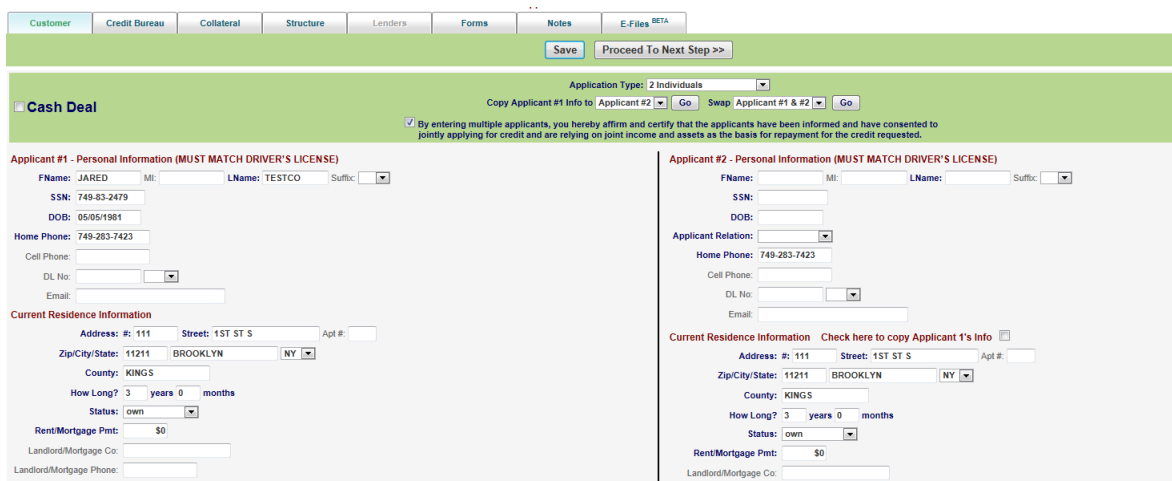
Starting the deal

- 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.
- 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.



The screenshot shows the 'Customer' tab of the 'Create a Deal' form. The 'Cash Deal' checkbox is selected. The form is divided into two columns for Applicant #1 and Applicant #2. Each column contains fields for personal information (FName, MI, LName, SSN, DOB, Home Phone, Cell Phone, DL No, Email) and current residence information (Address, Zip/City/State, County, How Long, Status, Rent/Mortgage Pmt, Landlord/Mortgage Co). A disclaimer box is visible between the two applicant sections, stating that by entering multiple applicants, the user affirms and certifies 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.

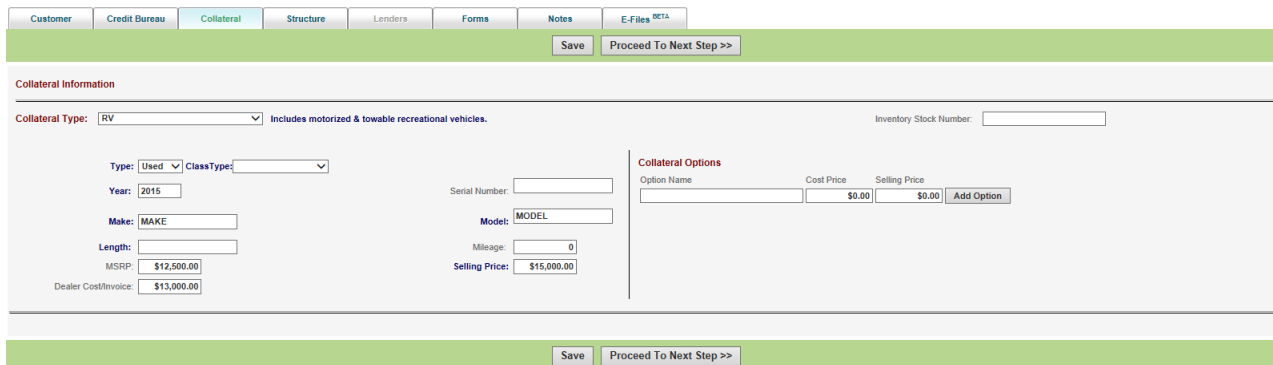
Credit Bureau tab

- 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

- Verify or fill in information for the RV.
- When you are done on the **Collateral** tab, click the **Proceed to Next Step** button.



The screenshot shows the 'Collateral Information' form. At the top, there is a navigation bar with tabs: Customer, Credit Bureau, Collateral (selected), Structure, Lenders, Forms, Notes, and E-Files BETA. Below the tabs are 'Save' and 'Proceed To Next Step >>' buttons. The form itself has a header 'Collateral Information' and a sub-header 'Collateral Type: RV' with a dropdown menu. To the right of this is a note 'Includes motorized & towable recreational vehicles.' and an 'Inventory Stock Number' field. The main form area is divided into two columns. The left column contains fields for 'Type: Used', 'ClassType', 'Year: 2015', 'Make: MAKE', 'Length', 'MSRP: \$12,500.00', and 'Dealer Cost/Invoice: \$13,000.00'. The right column contains fields for 'Serial Number', 'Model: MODEL', 'Mileage: 0', and 'Selling Price: \$15,000.00'. To the right of these fields is a 'Collateral Options' section with a table. The table has columns for 'Option Name', 'Cost Price', and 'Selling Price'. The first row shows '\$0.00' for both 'Cost Price' and 'Selling Price', with an 'Add Option' button to the right. At the bottom of the form, there are 'Save' and 'Proceed To Next Step >>' buttons.

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.

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.

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> Add Files Send Files Delete Files </div>							
Title	Description				File Access Log	Transmission Log	Uploaded
<p><u>Instructions</u></p> <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> 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 							
<div> Add Files Send Files Delete Files </div>							

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