

AppOne

**2015.1 AppOne Management System
(AMS) EXTERNAL Release Notes**

April 2015

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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 **Upload** 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 **Delete Files** button deletes selected files.
- 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).
- An **Also Save to E-Files** checkbox was added to the **Document Forms Print** pop-up. The user can check this box to save the printed forms as a file on the **E-Files** tab. When the user clicks the **Print Selected Forms** button, a **Save to E-Files** pop-up opens for assigning a **Title** and **Description** to the file.

E-Files tab

Dealers	Production	System Admin	Help																								
DO NOT TOUCH TMFS Marina Sales FL - Lot #7352 - Application #1304776																											
<div><div>Back</div><div>Forward</div><div>Home</div><div>Print</div><div>Log Out</div><div>Print</div><div>Send Files</div><div>Delete Files</div><div>Clone</div><div>Add Note</div><div>Back To Search Results</div><div>Print Credit App</div></div> <div>Search</div> <div><div><div></div></div><div>Advanced</div></div>																											
<div>SummaryLender CallbacksFundingCustomer InterviewApplicant(s)Credit ReportsVehiclesStructureNotesE-FilesAudit Logs</div>																											
<table><tr><th>Title</th><th>Description</th><th>Show Portal</th><th>File Access Log</th><th>Transmission Log</th><th>Last Modified</th></tr><tr><td><input type="checkbox"/> Title/Registration</td><td></td><td>Yes</td><td>View Log</td><td>View Log</td><td>Kyle Marthaler 3/10/2015</td></tr><tr><td><input type="checkbox"/> Driver's License</td><td>Picture of Driver's License</td><td>Yes</td><td>View Log</td><td>View Log</td><td>Kyle Marthaler 3/10/2015</td></tr><tr><td><input type="checkbox"/> Funding Package</td><td></td><td>Yes</td><td>View Log</td><td>View Log</td><td>Kyle Marthaler 3/10/2015</td></tr></table>				Title	Description	Show Portal	File Access Log	Transmission Log	Last Modified	<input type="checkbox"/> Title/Registration		Yes	View Log	View Log	Kyle Marthaler 3/10/2015	<input type="checkbox"/> Driver's License	Picture of Driver's License	Yes	View Log	View Log	Kyle Marthaler 3/10/2015	<input type="checkbox"/> Funding Package		Yes	View Log	View Log	Kyle Marthaler 3/10/2015
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<input type="checkbox"/> Funding Package		Yes	View Log	View Log	Kyle Marthaler 3/10/2015																						
<div>Instructions<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 Upload button.Examples of documents could include scanned lender related documents such as <i>Proof of Income</i>, <i>Proof of Residence</i>, <i>Credit Application</i>, <i>Contract/Funding Packages</i> 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.</div>																											

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	Show Portal	Size	Progress	Status
1	view.pdf	Credit Application		<input checked="" type="checkbox"/>	907 kb	0%	Queued
2	Contract.tiff	Driver's License	Picture of Driver's License	<input type="checkbox"/>	2.5 mb	0%	Queued
					3.4 mb	0%	

Add Files

Start Upload

Remove All

Send Files pop-up

Send Files

From:

Kyle.Marthaler@appone.net

To:

supprt@appone.net

Lender:

Bank of America, N.A. - BOA Marine Broker - App #12345

Comments:

Here are the files you requested.

Send Files

Cancel

Instructions

- Please enter the email address of the recipient to whom you wish to securely send the selected files.
- Please note that you may only enter a single recipient email address at a time. If you wish to send files to multiple recipients, you will need to repeat the process individually for each recipient.
- 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.

Email with link to file

Hello,

Below you will find a secure link to access the files listed for the transaction below.

AppOne AppID: 1304874

Dealership: DO NOT TOUCH IWP Sales LA

Customer Name: SAM CREDCO

Secure File Access Link: <https://test.appone.net/appone/efiles/efileauth/?id=bcV8Xu4vMUiqD7vX1TIT8g%3d%3d>

Files: Driver's License, Titling/Registration

Additional Comments: Here are the files you requested.

Please Note: The link above will expire in 48 hours. Additionally, you will be required to enter some transaction specific information to authenticate your access to the transaction above.

Thanking You,
Kyle Marthaler

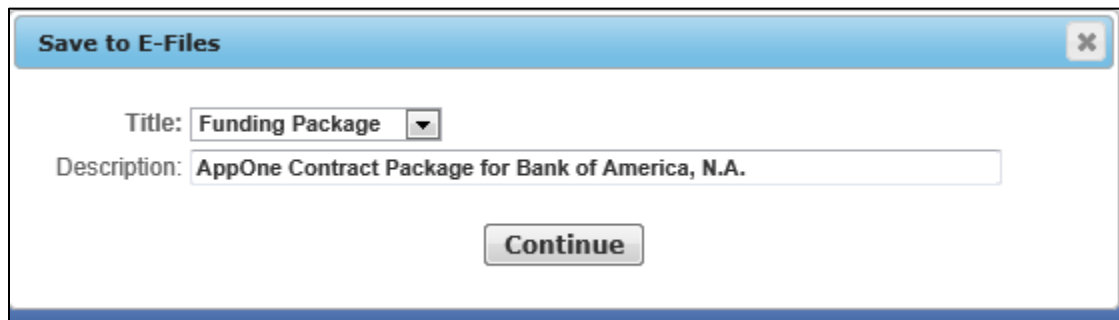
File Access Log pop-up

File Access Log	
User Name	Access Date
Kyle Marthaler	3/23/2015 10:46 AM
John Smith	3/23/2015 10:47 AM
Nick Johnson	3/23/2015 10:49 AM

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

Save to E-Files pop-up



A screenshot of a 'Save to E-Files' pop-up window. The window has a blue title bar with the text 'Save to E-Files' and a close button (X) in the top right corner. Inside the window, there is a 'Title:' label followed by a dropdown menu showing 'Funding Package'. Below that is a 'Description:' label followed by a text input field containing 'AppOne Contract Package for Bank of America, N.A.'. At the bottom center of the window is a 'Continue' button.

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.
- Help tab

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