

AppOne

**2015.1 Platform for VFI Services
EXTERNAL Release Notes**

April 2015

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Ability to Add Notes on Deal

Users are now able to attach notes to a deal from the portal. The new **Notes** tab includes an **Add Notes** button and a list of existing notes. To attach a note, the user clicks the **Add Notes** button and enters text in the **Add Notes** pop-up. An Add Notes button was also added to the Lenders tab.

Notes tab

The screenshot displays the Specialty Dealer Portal interface. At the top, the header includes the logo for Wolters Kluwer Financial Services and appone. The main navigation bar contains links for HOME, CREDIT REPORTS, LENDERS, ADMIN CONSOLE, SUPPORT, and ANNOUNCEMENTS. A user profile section on the right shows 'Tech Support: 677.404.6708', 'Welcome Back Kyle (DO NOT LOG OUT)', 'SAP Customer #: 13245X', and 'Quick Quote | Logout'. Below the navigation bar, a sub-header displays 'App ID: 1305632 Customer Name: GUY TESTCO'. The main content area features a tabbed interface with 'Customer', 'Credit Bureau', 'Collateral', 'Structure', 'Lenders', 'Forms', 'Notes', and 'E-Files BETA'. The 'Notes' tab is selected, showing an 'Add Note' button. Below this, a table lists existing notes with columns for 'For', 'Note', and 'Added By'. The table contains one entry: 'from dealer', 'This Is An Example Note.', and 'Kyle Marthaler 4/16/2015 4:29 PM'.

For	Note	Added By
from dealer	This Is An Example Note.	Kyle Marthaler 4/16/2015 4:29 PM

Add Notes popup

The screenshot shows a large, empty rectangular area, which is the Add Notes popup form. It is currently blank, indicating that no text has been entered yet.

Add Mailing Address for PO Boxes

We added an **Enter Mailing Address (different than Current/Physical Address)** checkbox to applicant information pages on all portals. If the box is checked, **Address**, **Zip/City/State**, and **County** fields open to allow entry of a mailing address. A post office box number can be entered in the **Address** field for the mailing address.

Applicant #1 - Personal Information (MUST MATCH DRIVER'S LICENSE)
FName: MI: LName: Suffix:
SSN: - -
DOB: / /
Home Phone: - -
Cell Phone: - -
DL No:
Email:

Current Residence Information
Address #: Street: Apt #:
Zip/City/State:
County:
How Long? years months
Status:
Rent/Mortgage Pmt:
Landlord/Mortgage Co:
Landlord/Mortgage Phone: - -
☐ Enter Mailing Address (different than Current/Physical Address)

Current Employment Information
Status:
Occupation:
Employer Name:

☒ Enter Mailing Address (different than Current/Physical Address)
Address:
Zip/City/State:
County:

Decision Notification

We updated the **Lenders** tab to add a **Send to Dealer** link for each lender. The VFI user can click on the link to notify the dealer by email of the lender's decision.

Lender:	BOA RV Indirect	CLH Fax Lender
Transmission Status:	COMPLETED	FAILED
Lender AppID:	0	0
Analyst Name:	-	
Analyst Phone:	-	Ext:
Decision:	PENDING Send to Dealer	Pending Send to Dealer
Expiration Date:	-	
Buy Rate:	-	0.00%
Max Rate:	-	0.00%
Max Term:	-	0
Max Advance:	-	\$0.00
Max Loan Amount:	\$9,999,999.00	\$0.00

Faxed Credit App Updates

We updated the faxed credit application template to clarify the status of a secondary applicant and to clarify that the faxed document is not intended to be a signed credit application. The following revisions were made:

- The Secondary Application relation will populate with whatever value chosen by the dealer on the portal. Possible values include:
 - Spouse
 - Joint
 - Cosigner
 - Comaker
 - Guarantor
 - AuthorizedUser
- Add a title: "Transaction Summary to Lender"
- Added language at top of form (below the title): "This form is not an application completed by buyer."

- Removed both “Alimony” boxes and language at right of form.
- Removed the “certification” paragraph at bottom of form.

Transaction Summary to Lender					
This form is not an application completed by buyer					
DO NOT TOUCH IWP SALES LA					
123 SOME DEALERSHIP ST. SUITE 101A DEALERSHIP CITY LA 00001 PHONE: 000-000-1234 FAX: 866-422-9910					
PRIMARY APPLICANT					
Full Name: MIKE TEST		SSN: 423-42-4234		DOB: 5/5/1975	
Address: 1111 1ST ST S		City: BROOKLYN		State: NY Zip: 11211	
How Long: 3Yrs.	Phone: 423-423-4324	Pmt: \$0.00	To:	Status: Own	
Previous Address:					
Employer: NURSECO	Occupation: NURSE	Address: BROOKLYN, NY 11211		Ph: 423-423-4324	
Salary: \$4,343.00 monthly.	How Long: 3Yrs.	Other Income: \$0.00/month	Source:		
Previous Employer:					
Second Job:					
Personal Reference #1:		Personal Reference #2:			
Bank References:		Signature: On file dated 4/17/2015		Drivers License No:	
SECONDARY APPLICANT					
Full Name: JILL TEST		SSN: 423-42-4234		DOB: 5/5/1975 Relation: Cosigner	
Address: 1111 1ST ST S		City: BROOKLYN		State: NY Zip: 11211	
How Long: 3Yrs.	Phone: 789-564-6542	Pmt: \$0.00	To:	Status: Own	
Previous Address:					
Employer: WALMART	Occupation: SALESMAN	Address:		Ph: 423-423-4234	
Salary: \$2,850.00 monthly.	How Long: 3Yrs.	Other Income: \$0.00/month	Source:		
Previous Employer:					
Second Job:					
Personal Reference #1:		Personal Reference #2:			
Bank References:		Signature: On file dated 4/17/2015		Drivers License No:	
COLLATERAL INFORMATION					
Serial No: 1N6AD07U66C407987	Year: 2006	Age: Used	Make: NISSAN	Model: FRONTIER CREW CAB-V6	
Style: CREW CAB SE 2WD	Book Value w/adds: \$11,025.00			Mileage: 45120	
Options/Accessories: ALUMINUM/ALLOY WHEELS					
TRADE-IN INFORMATION					
Trade #1: 2007 TRADEMAKE TRADEMODEL US BANK			Trade #2:		
DEAL STRUCTURE					
Selling Price: \$12,550.00	Taxes: \$1,155.00	Trade In Allowance: \$1,000.00	Trade In PayOff: \$500.00	Cash Down: \$3,000.00	Amt. Requested: \$9,775.00
Payment: \$108.47	Total Fees: \$70.00	Total Products: \$0.00	Rebate: \$500.00	Term: 120	Rate: 5.99
Generated from the AppOne System. To learn more about AppOne and how it can help automate your indirect lending processes go to http://www.appone.net .					

NADA Motorcycle Book-Out

We implemented NADA book-out functionality for MotorCycle/ATV dealers. On the Collateral page, if the dealer is enabled for a MotorCycle/ATV lender program that requires an NADA book-out, the following message is displayed:

If you plan on submitting this application to one of the following lenders, you must perform a NADA book-out prior to submitting the application to the lender.

Note:

Currently, only MB Financial Bank MotorCycle & ATV programs will be enabled to require a book-out.

The NADA Book-Out button opens a series of pop-ups that step the user through Year, Make, Model Type, Model & Trim, and Options selections. The final pop-up shows Pricing information and includes a Save Collateral & Book Out to Application button.

Collateral tab before book-out

App ID: 1305053 Customer Name: JOHN DOE

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

Save Proceed To Next Step >>

Collateral Information


Collateral Type: Motorcycle Inventory Stock Number:

NADA Book-Out

Type: Year: Make: Body Style: ORIGINAL MSRP: \$0.00

Fuel Type: Serial Number: Model: Mileage: 0


NADA book-out pop-up, select Year

 The Power of Vehicle Information
Guides | Data | Integrated Solutions | Analysis

Click on a year below to get the Manufacturers.

[Home](#) > [Year](#) > [Make](#) > [Model Type](#) > [Model & Trim](#) > [Options](#) > [Values](#)

Motorcycles



[2015](#) [2014](#) [2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#)
[2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#) [2000](#)
[1999](#) [1998](#) [1997](#) [1996](#)

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Collateral tab after book-out

App ID: 1305053 Customer Name: JOHN DOE

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

Save Proceed To Next Step >>

Collateral Information

Collateral Type: Motorcycle Inventory Stock Number:

NADA Book-Out


Type: Used Fuel Type: Year: 2013 Make: Harley-Davidson Model: XL1200X Forty-Eight Body Style: ORIGINAL MSRP: \$11,124.00 Mileage: 0

Bookout Information


	Rough Trade-In/Wholesale	Clean Trade-In/Wholesale	Average Retail
Base:	7,090	8,740	10,120
Accessory:	0	290	467
Final:	7,090	9,030	10,587

Vehicle Accessories
AM/FM Radio/CD/Aux w/Speakers

NADA book-out pop-up, final values


 The Power of Vehicle Information
Guides | Data | Integrated Solutions | Analysis

Home > Year > Make > Model Type > Model & Trim > Options > Values

 Motorcycles
2013
Harley-Davidson
XL1200X Forty-Eight

2013 Harley-Davidson Cruisers

4/1/2015 10:10:16 AM



Save Collateral & Book Out to Application

PRICING

	Rough Trade-In/Wholesale	Clean Trade-In/Wholesale	Average Retail
Base Price	8740	7090	11124
Options			
AM/FM Radio/CD/Aux w/Speakers	467	290	0
Total Price	9030	7090	11124

NADA bookout filter rule

	Integrated Lenders					
	Default Program	Default Program	CUAC Motorcycle Indirect (LA)	Marine One Motorcycle Program	MBF Motorcycle Indirect	Merrick Default Program
FICO Score	n/a	n/a	?	?	?	n/a
Time on Credit File	n/a	n/a	?	n/a	?	n/a
# of Tradelines	n/a	n/a	?	n/a	?	n/a
Job Time	n/a	n/a	✓	n/a	✓	n/a
Residence Time	n/a	n/a	✓	n/a	✓	n/a
Max Advance	n/a	n/a	✓	✓	✓	n/a
Down Payment	n/a	n/a	n/a	✓	n/a	n/a
Min Loan Amount	n/a	n/a	n/a	✓	n/a	n/a
Max Loan Amount	n/a	n/a	n/a	✓	n/a	n/a
Lending Area	n/a	n/a	n/a	✓	n/a	n/a
Income	n/a	n/a	n/a	✓	n/a	n/a
Collateral	n/a	n/a	n/a	✓	n/a	n/a
NADA Bookout	n/a	n/a	n/a	n/a	✓	n/a
Notes	-	-	-	This lender's application interface appears to be experiencing intermittent connectivity issues. If you notice that callbacks are not coming back in a timely manner for this lender, then that could mean that the lender did not receive the application and you might need to re-submit the application. Please be sure to check with your lender prior to re-submitting any applications.		-
SELECT LENDER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Remove "Documentation Fee" from Deal Structure for all Collateral Types in DE

We removed the **Documentation Fee** from the **Structure** tab for Delaware. Based on American Financial Services Association and the State Bank Commissioner's office interpretation of Delaware statutes, we have concluded that documentation fees are not permitted to be imposed on the buyer. Delaware dealers will no longer have a **Documentation Fee** available on the **Structure** tab.

Public Officials & Fees

Title Fee:	<input type="text" value="\$0.00"/>	<input type="checkbox"/> tax
License Fee:	<input type="text" value="\$0.00"/>	<input type="checkbox"/> tax
Registration Fee:	<input type="text" value="\$0.00"/>	<input type="checkbox"/> tax
Lien Fee:	<input type="text" value="\$0.00"/>	<input type="checkbox"/> tax
UCC Filing Fee:	<input type="text" value="\$0.00"/>	<input type="checkbox"/> tax
Total Front-End:	\$25,000.00	

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 **Add Files** 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 **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 Forms tab. 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

App ID: 1253969 Customer Name: CODY TESTCO

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

Add Files Send Files Delete Files

Title	Description	File Access Log	Transmission Log	Last Modified
Titling/Registration		View Log	View Log	Kyle Marthaler 3/10/2015
Driver's License	Picture of Driver's License	View Log	View Log	Kyle Marthaler 3/10/2015
Funding Package		View Log	View Log	Kyle Marthaler 3/10/2015

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

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Add Files pop-up

Add Files

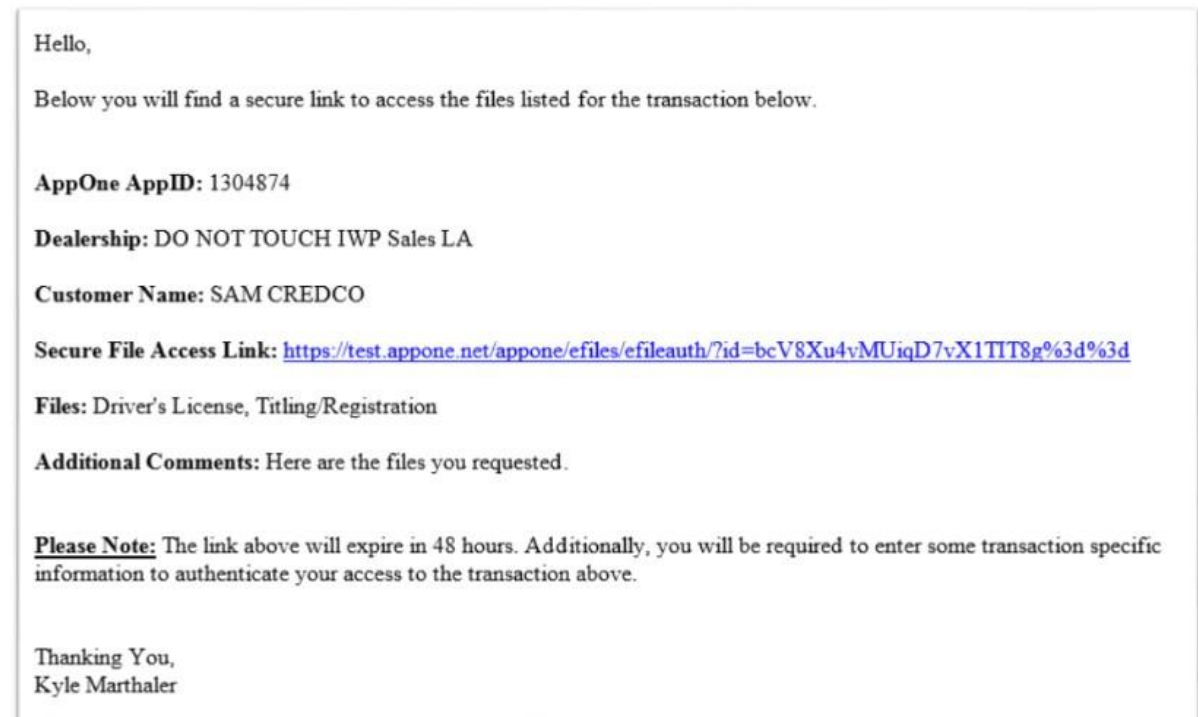
File Requirements

- 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	Size	Progress	Status
1	CCITT_1.TIF	Driver's License	Picture of Driver's License	18 kb	0%	Queued
2	MARBIBM.TIF	Titling/Registration		2.5 mb	0%	Queued
3	Certificate.pdf	Funding Package		96 kb	0%	Queued
4	embeddedsection.pdf	Contract	RIC	8.1 mb	0%	Queued
				10.7 mb	0%	

Add Files Start Upload Remove All

Email with link to file



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

Forms tab with Also Save to E-Files checkbox

Specialty Dealer Portal
Wolters Kluwer Financial Services | appone

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

App ID: 1304814 Customer Name: JERRY TESTCO

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

Print Adverse Action | Print Risk Based Pricing Notice | Print Credit Application

Print Selected Forms ☐ Also Save to E-Files

Integrated Lender Forms

Save to E-Files pop-up

Save to E-Files

Title: **Funding Package** ▼

Description: **AppOne Contract Package for Bank of America, N.A.**

Continue

Set Up MarineOne Stips on all Programs

We updated the portal so that all MarineOne stipps display on callbacks for all MarineOne programs.

Funding Stips:

- Signed Completed Original Retail Installment Contract (must be printed out from AppOne System) ❌
- Authorization Agreement for Preauthorized Payments (when applicable) ❌
- Sales Tax form (if sales tax is not included on the contract) ❌
- Original signed Credit Application ❌
- Insurance Binder ❌
- Application for Title ❌
- Copy of Warranty, Gap Insurance and Service Contract (when applicable) ❌
- Copy of Credit Life or Accident and Health (when applicable) ❌
- Telephone Bill (Home phone OR Cell Phone Bill / AND Utility Bill) ❌
- Proof of Income - Primary Signer (Taxable Income only. Tax return required for self-employed customers; 1099's alone are not acceptable as proof of income.) ❌
- Proof of Income - Co-Signer (when applicable) ❌
- Drivers License ❌
- Personal References (need four names and phone numbers) ❌
- Arkansas Financing Notification ❌
- Factory invoice or bookouts for boat, motor and trailer ❌
- Title Applications for Boat and Trailer ❌
- UCC – 1 forms where applicable ❌
- USED UNITS: Copy of front and back of previous title - Boat and Trailer ❌
- Completed Funding Checklist for Customer's State ❌
- Copy of signed Buyers Order. ❌
- Please refer to the Marine One factsheet for program details ❌
- Employment for Primary Applicant must Verify Current at the time of Funding ❌
- Employment for Co-Applicant must Verify Current at the time of Funding ❌
- Registration and title fees receipt (if applicable) ❌
- Marine One Notarized Power of Attorney form ❌
- New UNITS: Copy of the front and Back of the MSO. Please send the Original MSO for Non-titling states. ❌

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.
- Support tab

User Provisioning Updates

We simplified the ability for users to reset passwords on the portals without needing to contact SupportLine. The following changes were made:

- The **Admin Console Add/Edit User** screen was updated to add an **AutoGenerate** button and a **Send email to user with login credentials** checkbox.
- On the **Password Reset Form**, the validation message now instructs the user to contact the Dealer Owner or Administrator with log-in problems. Previously, the validation message advised users to contact Supportline.
- An **Email** field was added to the **Password Change Form**.

After 3 failed login attempts, the user is brought automatically to the **Forgot Password** screen to reset the password. After 5 failed login attempts, the user account is locked and the user must contact the Dealer Administrator to unlock the account and generate a new temporary password.

VFI Admin Console

Specialty Dealer Portal
Wolters Kluwer | AppOne
Tech Support: 877.484.6788
Welcome Back Kyle (C.L. HANSON)
SAP Customer #: 12345
Quick Quote | Logout

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

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

Add/Edit User

First Name:
Last Name:
Email Address:
Username:
Password: (Click the AutoGenerate button to generate a password.)
Fax Number: - -
Locked:
Is Admin:
Disabled:
☒ Send email to user with login credentials (optional)
☐ You hereby affirm and warrant that you are an authorized user of your organization who is approved by management to make changes to the user's account and further affirm and warrant that the user named above is an employee of your organization who is authorized to use this system.

New validation message

The following errors were found on this form:
The system was unable to locate any user record based upon the information entered. Please verify the information and try again. If you are still having difficulty, then please contact the Dealership Owner/Administrator.

welcome to the **AppOne Dealer Portal**

Instructions:

- Please enter your **username** or your **email address**. It is recommended that you enter your username if you know it.
- If the system is unable to locate your user record, then please contact the administrative user for your dealership to reset your account password for your user account.

Password Reset Form

Username: OR
Email:

Password Change Form

Password Change Form 

User: miketestco

Current Password:

New Password:

Confirm New Password:

Email: mike.testco@woltersk

Security Question: What is your favorite pet's name? ▼

* Security Answer: Spot

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