

County User Guide

August 2015 webDEALER 2.3.0





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Overview

What can webDEALER do for you?

Title work is submitted electronically to county offices. Transactions include images of the required documents necessary to process the title application including, but not limited to, the evidence of ownership (e.g., MCO, Out of State title, Texas title, etc.), Form 130-U, odometer disclosure statement, and vehicle inspection report. WebDEALER provides a straight forward process to transfer information quickly from a dealer management system to webDEALER, as well as a manual entry option (keyboard entry). When you're ready, approving the title application is literally a click of a button.

Features

Entering title applications on the web allows dealers to use a more streamlined title and registration application process and provides counties with a more efficient approval process including:

- Option to setup dealers:
 - without inventory assign the plate and print the sticker at the county office. No bonding required
 - with inventory validation of allocated inventory to dealers live monitoring of inventory issued by dealers
- System monitoring of the number of outstanding title transactions for a dealership allows us to remove the Form VTR-31-RTS requirement
- Allows dealerships in other counties to easily submit to your county, once approved and set up by your county
- Examine and view documents as a single pdf regardless of how the dealer uploads the title documents
- Transfer of special plates with live calculation of the prorated fees
- Easily return a title application with feedback
- Visibility to all titles that pertain to the county from start to finish
- Payments from each dealer are calculated precisely





Special note on signatures

With webDEALER, there are two ways a dealer can process and complete a webDEALER transaction:

- Upload of the completed Application for Texas Title (Form 130-U)
- Electronically capture the seller's and buyer's signature using the Seller's Disclosure and Buyer's Acknowledgement login page

<u>Upload of the Application for Texas Title (Form 130-U)</u>

This method requires the dealer upload the title application (Form 130-U) in order for the transaction to be electronically processed in webDEALER. The "Closer" at the dealership will not have to login to webDEALER to create the "Seller Disclosure" and get the "Buyer Acknowledgment" during the closing. Instead, the "Closer" and buyer(s) will continue to sign the Form 130-U as they normally do, and the dealership titling clerk will then upload it when processing the transaction.

Electronically capture the seller's/buyer's signature

This method requires that the dealer begin the transaction by creating the seller's disclosure page at time of sale. The buyer must have a valid Texas Driver License/Identification (ID) and is required to "login" to webDEALER using the last eight-digits of the VIN, Texas Drivers' License/Identification Card number, date of birth, Drivers' License/Identification Card audit number and last four-digits of the Social Security number to complete the "Buyer Acknowledgement" page. A successful login and acknowledgement by the buyer constitutes the required signature for the odometer reading and sales price. The Form 130-U is not required to be uploaded in this case, and this will be evident when the county is reviewing the title transaction online.



Getting Started

Setup

- Notify your local TxDMV Regional Service Center (RSC) that your county is ready to start using webDEALER. RSCs are there to set your county up to use webDEALER and assist in any way. Once a county administrator has been authorized to access webDEALER, a county can independently bring on dealers at their own pace.
- WebDEALER is designed to have a minimum of two people in each county and dealership designated as administrators. Administrators have access to all Assigned Permissions.
- > To add a dealer, obtain the user name (from E-Tags) and dealer "P" number (GDN) from your dealer contact, as those are needed to authorize the dealership and dealer administrator in webDEALER. Call the dealer and have this administrator login to webDEALER and add a backup administrator.
- > Dealers should be prepared to identify a process that works for them. A common file folder to keep scanned documents with a naming convention to identify each document is best thought out ahead of time.
- webDEALER's web address may be found on TxDMV.gov. https://webdealer.txdmv.gov

You should know

The Form VTR-31-RTS is not required for a webDEALER transaction.

The evidence of ownership (e.g., MCO, Out of State title, Texas title, etc.) must be scanned, attached, and show both sides with the "Surrendered" stamp on the back.

IMPORTANT SCANNING REQUIREMENT: The scanned images must be of the **original** documents. The scanned images CANNOT be copies of original documents. If the county or TxDMV determines that the documents attached to a transaction are copies of originals, the transaction will be returned or rejected, and the dealer will be required to scan the originals or obtain ownership through a court order or bond.

Recommendation

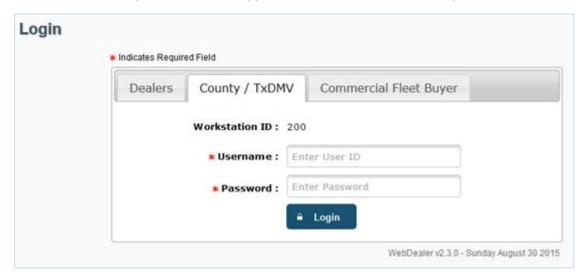
To achieve the most benefit from webDEALER, it is highly recommended that payments be made via Automated Clearing House (ACH). An ACH can be established whereby the county "pulls" funds from the dealership account as needed. See Appendix 3 for a sample agreement.





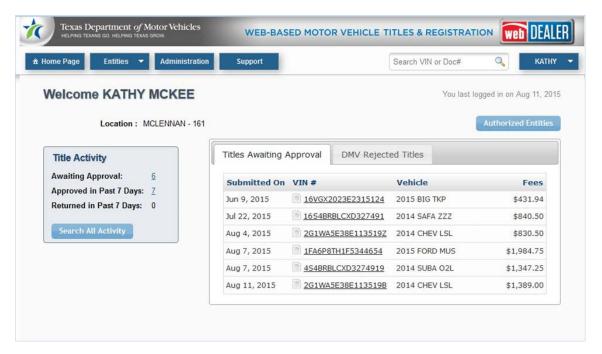
Sign into webDEALER

- 1. Access webDEALER using an RTS workstation. The webDEALER menu link can be found under the RTS Title menu. County Administrators must first give security rights through RTS Local Options.
- 2. The username and password for webDEALER are the same as what you use for RTS. Any password changes required must be completed using the RTS security menu.
- 3. The RTS Workstation ID you access webDEALER through will display on the login page. When RTS is closed out, all of your webDEALER approved titles will be reflected on your RTS Workstation ID.





County Home Page

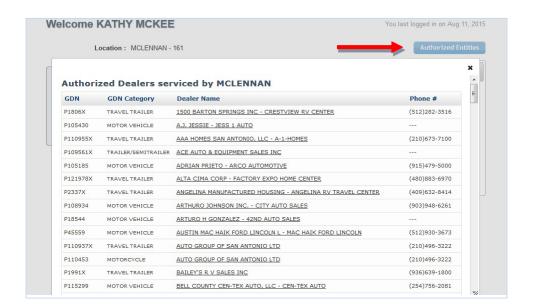


- 4. Home page gives an overall view of actions needed by county personnel.
 - Up to 10 of the oldest title transactions that are awaiting approval by the county. Titles Awaiting Approval are transactions considered complete by dealers and submitted to the county for approval.
 - Counts of certain activities are shown in the Title Activity box at the top left. Clicking on the underlined number will take you to the list of titles for the particular activity.
 - User account information may be found by hovering your cursor over your first name as seen near the top, right portion of the page:





5. Clicking on "Authorized Entities" will display a page with all the dealers and commercial fleet buyers that have been authorized to submit titles to your county.





Add County Users

webDEALER is designed to have a minimum of two people in each county tax office designated as administrators with access to all Assigned Permissions.

The administrator adds users to the county. In order for a user to have access to webDEALER, they must have a current username in RTS. The username and password in RTS will be the same in webDEALER. *Note: It is the County Administrator's responsibility to remove an employee's access when they are no longer working for the county.*

To add a county user

- 1. On the home page, select the "Administration" tab.
- 2. At the bottom of the Location Details page, click "Manage User Accounts."

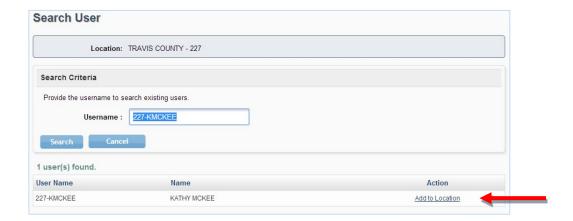


3. In the search criteria box, enter the username of the RTS user and click "Search."

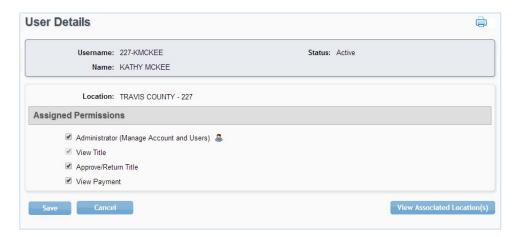




4. Locate the person to add and click "Add to Location."



5. Choose the appropriate Assigned Permissions options for the user.



6. If desired, view other locations for which the user is authorized.



7. Click "Save."

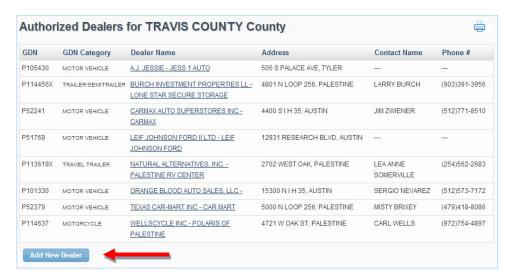


Dealer Administration

The county administrator adds the dealer and the dealer administrator. In order for a user at the dealership to access webDEALER, they must have access to eTags. The username and password in eTags will be the same in webDEALER.

To add a dealer to your county

- 1. Place the cursor over the "Entities" tab and select "Dealer Management."
- 2. Click "Add New Dealer" in the bottom left corner of the screen.



3. In the search box, enter the Dealer GDN and click "Search."

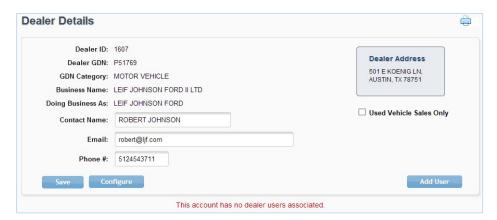




4. Click on the "Dealer ID." (This is a system generated ID number.)



5. On the Dealer Details page, enter the dealer's Contact Name, Email, and Phone Number. Click "Save."



A **Used Vehicle Sales Only** box has been added to the Dealer Details page. This box should be checked when setting up independent dealers (used vehicles). Counties do not have to check this box for franchise dealers.

Note: After setting up a dealer, the following message will display as appropriate in the Dealer Details page:

- For franchise dealers it will show "New & Used Vehicle Sales"
- For independent dealers (used vehicles) it will show "Used Vehicle Sales Only"



6. Click "Configure."





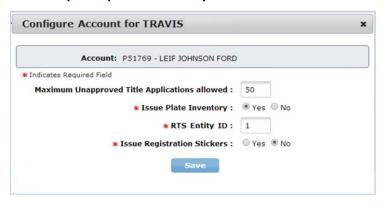
7. Enter the maximum number of unapproved title applications the dealer can have active at any one time. The application defaults to 50; the maximum number is 5,000.



Note: When the dealer reaches this maximum, the dealer will get an error message and cannot initiate additional title applications. The maximum number of unapproved title applications includes the number of in-progress and submitted title applications awaiting approval.

8. Choose "Issue Plate Inventory" and "Issue Registration Stickers" if desired. An RTS Dealer ID Number is required if plates are to be issued by the dealer.

Dealership set up with inventory to issue



Dealership set up with no inventory to issue (County Issued)



Note: When dealers issue plate inventory, webDEALER will check RTS to verify the inventory has been allocated.

9. Click "Save."



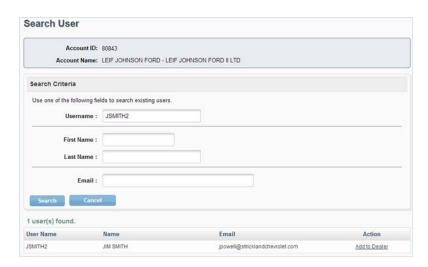


The dealer administrator can be added from the Dealer Details page by clicking "Add User." The administrator can be added now, or at a later time.

To add a dealer administrator

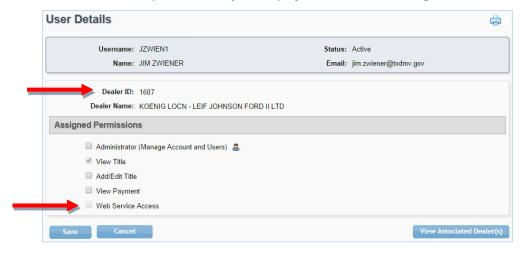
County tax office administrators are responsible for adding the dealer and dealer administrator to webDEALER. In order to add the administrator for a dealer, the dealer administrator must have access to eTags. The username and password in eTags will be the same for webDEALER.

On the lower right side of the Dealer Details page, click "Add User."
 Search for the user by entering their eTags information. Search by username, or their First and Last Name, or the Email. Click "Search." Note: A search by the username yields the best results.



- 2. From the search results, locate the user to add, and click "Add to Dealer" under the Action column.
- 3. Choose "Administrator." This action will check all of the available permissions.

Note: The "Web Service Access" permission is for setup of a dealer vendor integrated solution.



4. Click "Save."





Approve & Return Applications

To approve a title application, the user must have "Approve/Return Title" as an Assigned Permission on the User Detail page and <u>must be logged in through RTS</u>. See the Add County Users section (page 9) for more information.

Dealers can file title applications for new and used vehicles, Off-Highway vehicles (e.g., ATVs, ROVs, and Off-Highway Motorcycles), apply for title without registration "Title Only (No Registration)," and include rights of survivorship information.

County users can access the current vehicle record by clicking on the Current Vehicle Record link in the upper right-hand corner of the Title Preview page.



NOTE: Dealers will be required to stamp the evidence of ownership (e.g., Texas titles, Out of State titles, etc.) with a "SURRENDERED" stamp on the back of the title and retain it in their purchase and sales records. The "SURRENDERED" stamp must be stamped on the back of the ownership document and on the next blank assignment.

If all assignments have been used on the evidence of ownership and a Dealer's Reassignment accompanies the transaction, the evidence of ownership must be stamped "SURRENDERED" (diagonally) and the Dealer's Reassignment must also be stamped "SURRENDERED" on the next blank assignment or diagonally, if applicable.



IMPORTANT NOTIFICATION TO DEALERS: It is the dealer's responsibility to validate the Texas title against the latest motor vehicle record in the department's database. Once you stamp a title **"SURRENDERED,"** that title becomes invalidated, is considered surrendered to the department, and cannot be used in another transaction. If you stamp **"SURRENDERED"** on a title in error, you will be required to replace the evidence of ownership document (e.g., Texas title, Certified Copy of Texas title, Out of State title, or other ownership document) to submit a new transaction. (**NOTE:** All signatures are required to be recreated (signed by the original persons). If assignments cannot be recreated or a duplicate cannot be obtained, then the dealer's only option is to obtain a bond or court order.





Single Sticker (effective 03/01/2015)

With the single sticker functionality, the **Inspection Information** section will display at the bottom of the **Plate and Sticker Information** page if the dealer had to manually verify and enter the inspection information.

webDEALER will verify twice that the inspection is current:

- The inspection must be current on the date the transaction is created in webDEALER.
- The inspection must be current when the transaction is submitted to the county.

Validate that the inspection date and inspection type entered by the dealer matches the information on the Vehicle Inspection Report (VIR) that the dealer uploaded. If the VIR does not match the information entered or the VIR was not uploaded when required, the transaction should be returned to the dealer for correction.

The inspection must be current before the dealer can submit the title application to the county. An inspection is current when the inspection expiration date (month/year) is greater than the creation date in webDEALER and the date submitted to the county. If the inspection is expired, a new inspection will be required. If the inspection expiration is the same month/year as the creation date or as the date the dealer submits the transaction to the county, a new inspection will be required.

If the inspection expires before the dealer submits the title application to the county, current inspection information will be required to be entered or updated by the dealer. The VIR must be uploaded when the dealer manually enters or updates new inspection information. See images on page 21 and 22.



As of August 30, 2015, webDEALER will automatically determine and calculate the registration period of 12 or 24 months by the vehicle's registration class, ownership evidence surrendered, and the inspection type received.

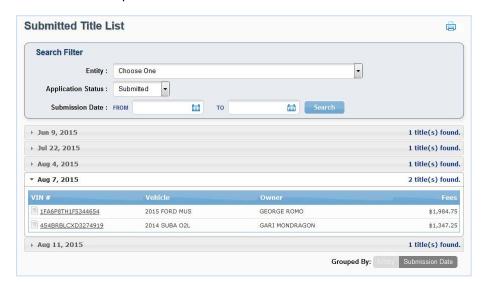




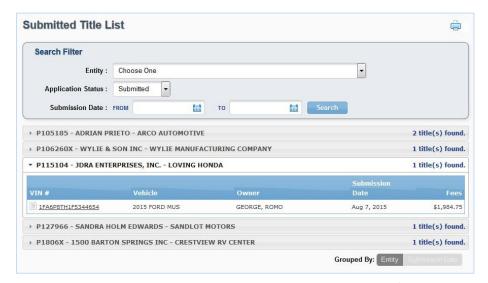
Approve a title application

The title applications ready for approval are listed on the home page in descending order. To easily locate a specific title, follow the directions below.

- 1. On the home page in the Titles Activity box, click on the number of titles indicated as Awaiting Approval. These are titles submitted by a dealer.
- 2. The Submitted Title List opens with a search filter box available.



Note: Title Applications may be grouped by dealer by selecting "Entity" at the bottom of the page.



- 3. Refine your search if necessary by limiting the results to one entity and/or by date range.
- 4. Locate the title to approve and click the "VIN #." This opens the Title Preview page.



5. Near the top of the page, click "View Documents" to review documents uploaded by the dealer.



Dealers can select and upload evidence of ownership and supporting documents as multiple individual files or a single file.

The document view screen has been enhanced for easier examination of title application documents. Documents will appear as a single file on the document view screen whether the dealer uploaded multiple individual files or a single file. The left column displays the title application data entered in webDEALER by the dealer, and the right portion of the screen displays the document.

Note: The left column now includes NMVTIS information.

Note: "Additional Supporting Document" has been added to the "Document Type" list.



Note:

- 1. Effective March 1, 2015, the Vehicle Inspection Report (VIR) replaced the VI-30 requirement.
- 2. For titling purposes, an Out-of-State Identification Certificate (VI-30) issued prior to March 1, 2015, is valid for up to a year after issuance and will continue to be accepted after March 1, 2015.
- 3. Title only transactions for <u>Dealer Resale</u> or <u>supported by an out-of-state title without a VI-30 or VIR</u> must be filed through the county tax office.



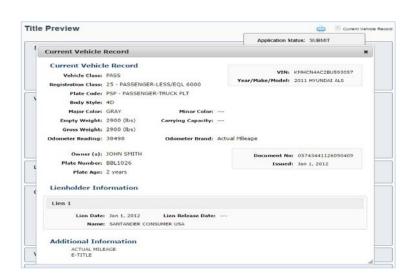


For used vehicle transfers, county users can access the current vehicle record by clicking on the **Current Vehicle Record** link in the upper right-hand corner of the **Title Preview** page. *Note: webDEALER users*processing used vehicle transactions will be able to see the current vehicle record, if a motor vehicle record exists in RTS.



When a county user clicks the Current Vehicle Record link, the Current Vehicle Record window pops up.





Note: Texas titles with value limiting brands will display in the "Additional Information" section of the current vehicle record (e.g., Rebuilt Salvage, Flood Damage, etc.) and be carried forward.

6. If the dealership has not been <u>configured to issue plates</u>, the Plate and Sticker section of the Title Preview screen will reflect that there is Incomplete Data (e.g., Plate number is missing).

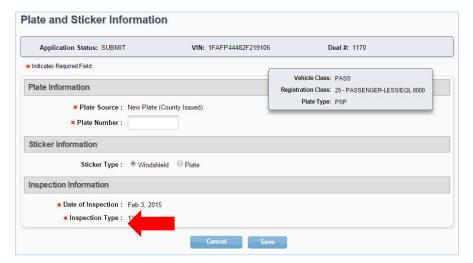


Click on the edit icon on the right to open the Plate and Sticker page. Enter the desired plate number and Save. Note: The webDEALER system provides the dealer a Replacement Plate option (Dealer Issued or County Issued) for vehicles where the replacement plate may be applicable. Additionally, the Replacement Plate Fee will be shown on all receipts. If the county issues the inventory for a replacement plate this screen will show the plate source as "Replacement Plate (County Issued)."





If the dealership had to manually verify inspection, the **Inspection Information** section will display the dealer's entries at the bottom of the **Plate and Sticker Information** page.



7. If the dealer is transferring the buyer's special plate, the Plate and Sticker section of the Title Preview screen will display the special plate information.



When inspection is manually verified by the dealer, the **Inspection Information** section is shown on the **Title Preview** page. The message below will display to prompt the county to verify that the VIR was uploaded by the dealer, and the inspection information entered matches the VIR.



- 8. Click on "Approve Title" at the end of the preview.
- 9. The application changes to Approved status.

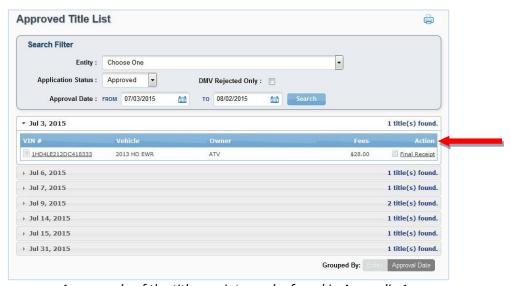




10. If the dealer is not <u>configured to print stickers</u>, the Title Preview screen will show a link to View Final Receipt where the county can print the sticker upon approval.

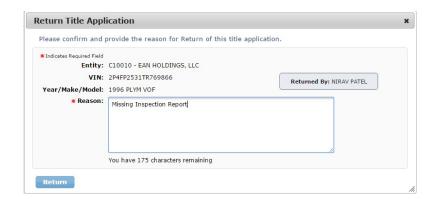


Receipts may be printed from the Approved Title List by pressing the "Final Receipt" link for each title.



An example of the title receipt may be found in Appendix 1.

- 11. Once the receipt is printed, the county can select "Return to Title Search" to continue to approve title transactions.
- 12. Alternatively, a county may return a title to the dealer by clicking "Return Title."



The title application is sent back to the dealer with a Returned status.

After the dealer makes the appropriate changes, it can then be re-submitted to the county.





Processing Payments

To record payments for the dealer, the user must have Access Payment as an Assigned Permission on the User Detail page. See Add County Users section (page 9) for more information.

Recording payments should be done at the end of each day for accounting purposes. Payments due are transactions approved and pending payment from the dealer. Recording payments inform the dealer how payments were applied.

Note: webDEALER does not initiate the payments. If payment is by ACH, the actual payment will be accomplished using your bank's website.

Record a payment

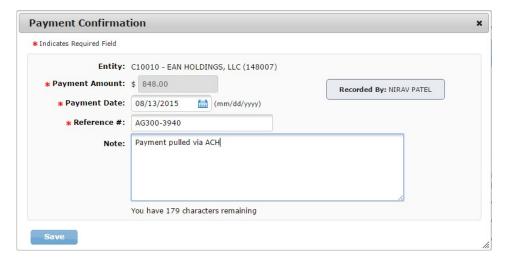
- 1. On the home page, place the cursor over the "Entities" tab.
- 2. Go to "Payments."
- 3. Select "Payments Due" from the dropdown.
- 4. The Approved Titles with Payments Due page opens. Dealers with outstanding payments will be listed under the Search Filter box. If the list of dealers is long, use the search filter box to locate the dealer.
- 5. Select the dealer to expand the list of transactions.
- 6. Locate the transaction, and select the box beside the fees to record the transaction as Payment Applied.



- 7. A running total is located at the bottom of the list for title applications selected.
- 8. Click "Record Payment."



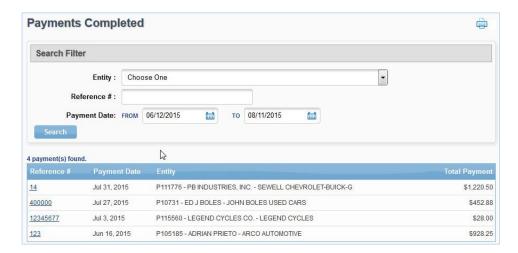
9. The Payment Confirmation box opens to record the Reference # (required) and to also write optional notes. When the payment information is complete, click "Save."



10. You are returned to the Approved Titles with Payments Due page. The message: "Payment information has been recorded successfully." displays.

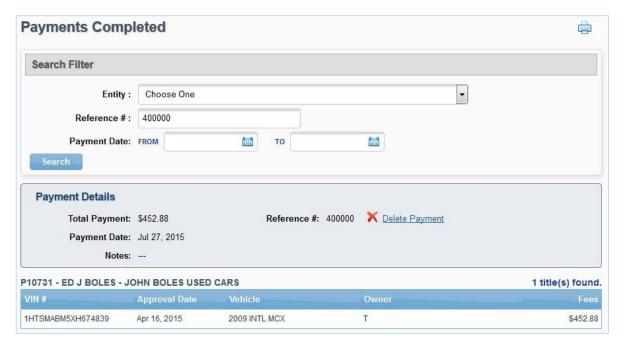
View a payment

- 1. On the home page, place your cursor over the "Entities" tab.
- 2. Go to "Payments."
- 3. Select "Payments Completed" from the dropdown.
- 4. The Payments Completed page opens.



- 5. Search by Entity, Reference #, or Payment Date.
- 6. Once you have located the payment to view, click on the "Reference #" to open the payment.
- 7. The payment details are listed.





Delete a payment

- 1. On the home page, place your cursor over the "Entities" tab.
- 2. Go to "Payments."
- 3. Select "Payments Completed" from the dropdown.
- 4. The Payments Completed page opens.
- 5. Search by Entity, Reference #, or Payment Date.
- 6. Once you have located the payment to delete, click on the "Reference #" to open the payment.
- 7. Click "Delete Payment."
- 8. The confirmation message displays "Payment record has been deleted. All associated titles have been marked unpaid."

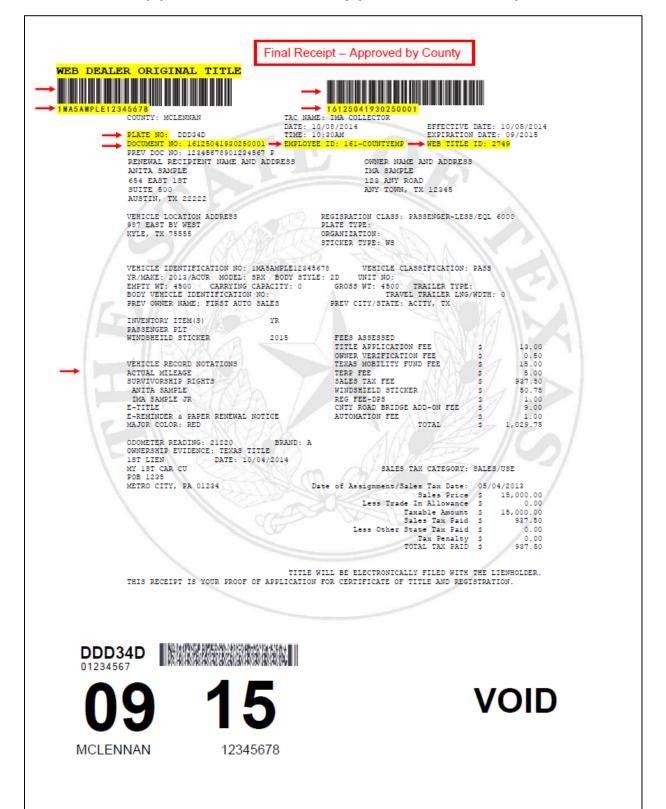




Appendices



Appendix 1 – Title Application Receipt





Appendix 2 – ACH Authorization Example

<IMA SAMPLE>
Tax Assessor Collector

Automatic Bank Draft Authorization Form

Please choose fro	m the following:				
Tax, Title	and License Fees				
Registratio	on Fees				
does not exceed the able to exceed the I (we) hereby autho debit transactions fi	at limit, have the limit if your work red orize the <name> Courtom the U.S. Bank nan partation fees. I (we) u</name>	it raised if necessary of quires**** nty Tax Assessor/Colle ned below, herein calle	or authorize the <nai ector's Office, herein c ed Depository, for the p</nai 	make sure that; your work ne> County Tax Office to la alled Company, to initiate payment of the Tax, Title and allowed by applicable law, i	be d
Name					
				tateZip	
Email		Phon	e		
Bank Name		Acco	unt Name		
Routing Number _		Acco	unt Number		_
Bank Representativ	re	Phon	e		_
	me (us) of this termin			have received written pany and Depository a	
Authorized Signat	ure:				
Signature			Date		_
Printed Name			Title		
Signature			Date		
Printed Name			Title		
<county contact=""></county>		Assessor/Collectors of 55-5555. For more info			
<name> County</name>					
Main Office: 123 Sample Austin, TX 78751 (555) 123-4567 Fax (555) 123-4567	Satellite Locations 123 Sample Austin, TX 78751 (555) 123-4567 Fax (555) 123-4567	123 Sample Austin, TX 78751 (555) 123-4567 Fax (555) 123-4567	123 Sample Austin, TX 78751 (555) 123-4567 Fax (555) 123-4567	123 Sample Austin, TX 78751 (555) 123-4567 Fax (555) 123-4567	





Appendix 3 - Dealer Equipment Requirements

In order for the implementation to be successful, each location must include the proper equipment and infrastructure necessary for the webDEALER application.

Operating System

This application was designed for use on Windows and Macintosh (MAC) operating systems. Other systems such as Linux and UNIX may be able to run the application, but will not be supported.

Internet Connection

This application requires access to the Internet; a high speed Internet connection is recommended.

Web Browsers

Web Browser

The system was designed to be compatible with the latest web browsers.

Website

	Internet Explore	r www.microsoft.com/ie	Internet Explorer versions 8.0 and later. Note: Compatibility Mode MUST be turned OFF.
3	Firefox	www.mozilla.com/firefoxwww.mozilla.com/firefox	Latest version
Ċ	Safari	www.apple.com/safariwww.apple.com/safari	Safari is a web browser designed and developed by Apple for the Macintosh Operating System.
	Chrome	www.google.com	Chrome is a freeware web browser developed by Google.

You may visit any of these browser's websites to confirm that you have the latest browser version installed. To check your browser version on a Windows machine, open the browser and click "Help," "About [*Browser Name*]," where [*Browser Name*] is the name of the browser you are using.



Version Requirements



Appendix 3 - Dealer Equipment Requirements (Continued)

Adobe Acrobat Reader

<u>Adobe Acrobat Reader</u> is used to view PDF (Portable Document Format) documents. Using Adobe Acrobat Reader, you may choose to view, print, or save these documents. If you don't already have the program installed, you may click here to download Adobe Acrobat Reader.

Printer Requirements

Printers used to print registration stickers must meet the following minimum specifications:

- Printer must be laser technology
- Media size should support at the minimum 8.5 x 11 in
- Memory: 32MB
- Processor Speed: 400MHz
- Print Languages: HP PCL6 & 5e, HP postscript level 3 emulation; direct PDF (v 1.4) printing
- Print Speed: Up to 30ppm, exact speed varies depending on the system configurations, software program, and document complexity
- Print Resolution, black: up to 1200 x 1200 dpi
- The laser jet printer fuser modes must have the capability to adjust heat range (from normal, low, high) in order to impose print on the documents
- The laser jet printer needs to come with LPT and/or USB connections based on computer system needs
- Printer must have the capability to adjust the X Y setting to compensate for alignment

Printers must be on the approved list provided by the TxDMV or be approved by the county.

Counties may choose to approve printers that are not on the list of department approved printers. Alignment is the most frequent challenge encountered with other printers, especially light weight printers. Print testing is necessary to ensure proper alignment and print quality. Counties will decide how many test stickers should be printed for their review, and sticker paper used for testing should be taken in to consideration.

The following criteria should be followed when verifying test sticker appearance:

- Ensure proper alignment on all print areas of the sticker paper.
- The ink should dry in a reasonable time period. Once dry, the ink should be tested to ensure it does not smear or scratch off on the sticker portions of the form.





Appendix 3 - Dealer Equipment Requirements (Continued)

Scanner Requirements

Dealers must have scanners in order to electronically attach ownership and supporting documents, such as a MCO, Texas title, Out of State title, forms, etc., to webDEALER transactions.

The scanned document must show all information and be readable. Information that is not captured on the scan, or is unreadable will delay processing.

Scanners must be capable of at least 200 DPI, but we recommend 300 DPI, which is the most common resolution for desktop scanners.

"Surrendered" Stamp

Each location should have a Surrendered stamp for MCOs.

Ink: BlackText: Arial

Size: 1/4 in. H x 2-1/4 in. L





Appendix 4 - Support Information

	Issue	Contact	Contact Information	Hours
County Tax Office	Title/Registration question	TxDMV Regional Service Center	Local phone or email	Monday – Friday 8:00 AM – 5:00 PM
County Tax Office	System process or business policy/procedure	TxDMV Regional Service Center	Local phone or email	Monday – Friday 8:00 AM – 5:00 PM
County Tax Office	webDEALER system issue	TxDMV IT Service Desk	(877) 933-2020	Monday – Friday 7:00 AM – 7:00 PM Saturday 8:00 AM – 3:30 PM
Dealer	Title/Registration question	County Tax Office	Local phone or email	Local Hours
Dealer	webDEALER system issue	TxDMV IT Service Desk	(877) 933-2020	Monday – Friday 7:00 AM – 7:00 PM Saturday 8:00 AM – 3:30 PM