Start of the Day: Opening a Cash Drawer

We are going to start our day by opening a cash drawer. We will also set an inventory location if need be. Normally you only have to set an inventory location once. Unless you move to different office then you need to make sure your inventory is pulled from the location you are at and not a different office location. Until we open a cash drawer we are not able to perform any transactions.

Starting from our New Manager springboard we're going to select our Cashiering Manager.

Opening a Cash Drawer	
New Manager springboard	Select **Cashiering** manager
No drawers will appear in our Open Drawers tab until we added another one.	
	Select **Add** header button
The Cashiering manager will default to the Cash Drawers tab and the Open drawer sub tab. Tabs and sub tabs are used to organize related information in an orderly manner within a particular springboard. No drawers will appear in our Open Drawers tab until we add one. Let's go ahead and select our Add header button. On this springboard we will have the ability to add our drawer. We see information on our username, office code, and the date, defaults to today's date. For those of you who may work at multiple locations, you may be wondering, "what if I have multiple offices I am working at?" No need to worry. Tapestry bases your office off of the IP Address you will be using so it will change when you log in at a different location. The fields within the Quantity column for both change and cash are yellow/required fields. As soon as data is entered in at least one of the required field for the daily float, the field value is populated, and all fields will turn green which means they are optional or editable, but not required. When we enter quantities the fields will turn green, we will get a hard error on the total till we have a total of 50.00 dollars for our float. Partners do not need to add a float. Let's go ahead and start entering in our quantity.	
	Enter **Quanity** of Change and Cash

Enter Daily Float			
Change	**Quantity**	**Cash**	**Quantity**
Pennies	**10**	$1 Bills	**7**
Nickels	**8**	$2 Bills	**0**
Dimes	**10**	$5 Bills	**2**
Quarters	**6**	$10 Bills	**1**
Fifty Cents	**0**	$20 Bills	**1**
Dollars	**0**	$50 Bills	**0**
		$100 Bills	**0**
++Total Change:	**3.00**	**Total Cash:**	**47.00**
		Today's Float Amount	**50.00**
		Select **Save** action button	
	Our drawer has now been added and we are ready to process transactions!	Takes you to **New Manager** springboard**.**	
	Navigation Panel	Select **Close All Managers** icon	

++Tapestry calculates amount based on quantity of amounts entered.
Office standards will be 50.00. If you add more than the office standard you get a hard error with message that says "please adjust float amount as it does not match the office standard."

Making a location your default:

Accessing the Vehicle Management Manager	
	Select **Vehicle Management** manager
	Select **No Vehicle Title Inv Found** hyperlink

Making a Location Your Default	
01A Santa Fe Permanent #1	Select **Make Default** hyperlink
	Select **Yes** action button
Default Location section	Select **01A Santa Fe Permanent #1** hyperlink
	Select **Edit Location** header button
Location Users section header	Select **Add** header button
Users section	Select **Me** hyperlink
	Select **OK** action button
	Select **Save** action button
	Select **Close All Mangers** icon

In-State Title Transfer

The first type of activity that we're going to learn to complete is a New Mexico In-state Title Transfer.

In-State Title Transfer	
New Manager springboard	
A majority of the Vehicle Services transactions can all be done from the same manager-the Vehicle Management manager. We will start by selecting this manager.	
	Select **Vehicle Management** manager

Vehicle Management	
This takes us to the **Vehicle Management** launch pad. There are a number of vehicle related transactions on this launch pad. Of these options, only **Title (and Register) a Vehicle** deals directly with titling and registering a vehicle. So for this watch it, We will select the **Title (and Register) a Vehicle** hyperlink.	
Vehicle Management manager	Select **Title (and Register) a Vehicle** hyperlink

Registration and Title Activity	
We are now on an activity springboard. All Vehicle Services transactions are considered activities and will be performed on springboards like this. Through these activities, Tapestry will gather all the information it needs and none of the extra information it does not need. The first piece of information we need to enter is the **VIN**	
VIN	**KMHDN56D05U177640**
When I tab off or click anywhere else within the springboard, the VIN becomes masked and a second, **Re-Enter VIN** field appears. We must enter the VIN again in order to ensure accurate keying. Note that it isn't possible to copy and paste in either of these fields. So, I will re-enter the VIN.	
Re-Enter VIN	**KMHDN56D05U177640**
I have received a hard error telling me that this VIN is a duplicate. Remember that fields in **red** are either incomplete or in error. They must be addressed by either correcting them or conducting a different activity. The **Stop** we see says that **This VIN already exists in the system.**	

Registration and Title Activity (cont.)	
In addition to the **Stop,** there is a hyperlink that can be selected to navigate to the **Vehicle Customer** springboard for the vehicle with this VIN. I will select this hyperlink since this vehicle already exists in Tapestry and I need to complete transactions for it from either its customer or account springboards.	
	Select **Go to duplicate VIN: KMHDN56D05U177640** hyperlink

Vehicle Customer springboard	
Before I continue transferring the title of this vehicle to a new owner, I want to highlight two points: 1) When it comes to Tapestry, we have several different kinds of customers. **Vehicles** and **Vessels** are considered customers. They have unique characteristics like VIN and HIN numbers just the same way individuals have social security numbers. We will discuss vehicles and vessels as customers throughout the course, but it's important to start thinking of vehicles and vessels as customers, not things that belong to individuals. 2) Even though we tried to begin a new Title and Registration activity for a vehicle, an **In-State Title Transfer** is initiated through the *existing* **Vehicle Customer** springboard. On this **Vehicle Customer** springboard, let's look at the **Accounts** sub-tab of the **Demographics** tab. We can see that the **Account ID** is **500TLR**. If we look in the customer attributes section of the springboard, we can see that this is actually a plate number. So going forward the **Account Id** will be the same as the **Plate Number** if one exists. Looking at the account in the **Accounts** sub-tab a little closer, we'll see that the **Account Type** is called a **Vehicle Ownership** account. So vehicles are customers and if they are registered, they have Vehicle Ownership Accounts identified by the plate number. We'll examine a Vehicle Ownership account springboard more closely in a few minutes. For now, I will continue with the New Mexico Title Transfer. Since a vehicle's title is specific to the vehicle and not connected to a vehicle's registration, all title activities for existing vehicle customers occur on the **Vehicle Customer** springboard. I am going to select the **Issuance Transaction** action button as the next step in this New Mexico Title Transfer.	
	Select **Issuance Transaction** action button
This launch pad has a number of title related transactions that I can perform for this vehicle. From here, I want to select the **Transfer Title (and Registration)** hyperlink.	

Vehicle Customer springboard (cont.)	
	Highlight **Transfer Title (and Registration)** hyperlink
Note that **(and Registration)** is in parentheses. This is because we can transfer the title only from the same transaction.	
	Select **Transfer Title (and Registration)** hyperlink

VIN	
We are on an activity springboard. Looking at the **Context Bar** I can see that it is a **Transfer Title and Registration** activity. On the left of the activity is the start a **Section Outline.** The **Section Outline** is made up of all the sections and sub-sections within each activity. Sections and sub-sections display one at a time as the activity is completed. We'll see more of how the **Section Outline** works as today's course continues. I must first select the transaction type from the drop-down menu. The choice I make in this field determines which fields will display next. I can select 1st Time Title, Lien/Bond Transactions, or Title Transfer. Each option will generate a different set of subsequent fields. This is how Tapestry helps us streamline transactions by only asking questions relevant to a particular transaction. Since I am conducting an in-state title transfer, I will select that option from the drop-down menu.	
Transaction Type	**Title Transfer**
After selecting the **Transaction Type,** Tapestry needs to know what kind of documentation the vehicle's new owner has presented. I need to select one from the **Document Acquired** drop-down menu. In this exercise, the owner has presented the **Certificate of Title** so that is the option I will select.	
Document Acquired	**Certificate of Title**
Notice that **Previous Title Number** and **Title State** are required fields.	
Previous Title Number	**1500102Z1000000**
Title State	**NM - New Mexico**
Now that all required fields in this sub-section are satisfied, there are a number of **action buttons** to select from. It is possible to save your progress and return to the activity within 90 days. To do so, select the **Save** action button. If you want to abandon the activity and have no intention to complete it in the future, select the **Cancel** action button.	

VIN (cont.)	
The **Previous** action buttons is currently grayed-out and un-selectable. That is because there is no previous sub-section to navigate. Finally, there is the **Next** action button. I will select this action button to proceed to the next sub-section.	
	Select **Next** action button

Vehicle Detail	
This is the **Vehicle Detail** sub-section. It is made up of two parts: **Vehicle Information** and **Insurance Information.** Notice that a number of fields in the sub-section are already populated. This is because the vehicle already exists in the system and these are the specifications for the vehicle according to Tapestry's records. If for some reason the vehicle information displayed here differs from the acquired documentation or is out-dated, it is possible to correct this information.	
	Highlight **VINQuery Override** checkbox
To make changes to any gray, uneditable fields, select the VINQUery Override checkbox at the bottom of the Vehicle Information portion of this sub-section. The information for this vehicle is accurate however, so I will begin entering required information into the **Primary Owner Type** field.	
Primary Owner Type	Select drop-down menu arrow
In Tapestry, owners can be either Businesses/Non-Profits, a Government, Individuals, or a Trust. In this particular exercise the primary owner will be an individual.	
Primary Owner Type	**Individual**
	Hover over **Color 1** and **Color 2**
Tapestry pulls in the vehicle's color from the Vehicle Customer springboard. However if the color of the vehicle has changed or a second color was added, we can use these drop-down fields to make those changes.	
In this case, the vehicle's paint color has changed and it is now Taupe.	
Color 1	**Taupe**
The next required field is to denote the **Odometer Code**.	
Odometer Code	Select drop-down field arrow
Tapestry records Odometer Codes to be **Actual, Exceeds Mechanical Limits, Exempt,** or **Not Actual.** In this case, we have an Odometer Statement and an **Actual** odometer code.	
Odometer Code	Select **Actual**
Next we must enter the Odometer Reading.	
Odometer Reading	**144000**
Units	Select drop-down field arrow
The next field allows us to change the units of the odometer reading. Some vehicles may record distance in kilometers so this will be helpful in those situations.	
Brands	Select drop-down field arrow

Vehicle Detail (cont.)	
If the vehicle has a brand it can be added in this field. Next are two questions regarding the lease and lien status of the vehicle. Select Yes or No as is appropriate. Note that answering yes for either of these questions does not mean we have to enter lessor or lien holder information right away. It is simply a way to tell Tapestry that those fields will be necessary within the **Ownership** section of the activity. However, for this exercise, the vehicle is not leased and there is no lien holder. So I will select **No** from the drop-down fields for both questions.	
Is this a leased vehicle?	**No**
Is there a lien holder?	**No**
Title Only checkbox	Hover over **Title Only** checkbox
Next we see a **Title Only** checkbox. If the owner does not wish to register the vehicle and only wants a title, select this checkbox. However, in this situation the owner does want to register the vehicle so that they can legally operate it on New Mexico roads so we will leave the box unchecked. Now that I've entered the **Vehicle Information**, I next need to enter **Insurance Information**. This is required since the vehicle will be registered. The company name and policy number are required.	
Company Name	**State Farm**
Policy Number	**584572592**
The state field defaults to New Mexico. However, it can be changed if the owner presents sufficient documentation that their out-of-state insurance meets New Mexico's minimum liability requirements. The last two fields are for the insurance Effective Date and Expiration Date.	
Effective Date	**07/25/2017**
Expiration Date	**01/25/2017**
Tapestry has generated a hard error because the expiration date I entered is before the effective date. Tapestry knows this not possible so it gives me a hard error. Remember, a **Hard Error** is one that must be corrected before continuing. In this case, I miss-typed the year. Once I correct that date, I will be able to proceed. Before entering the date, notice that I'm using a two digit month, two digit day, four digit year separated by slashes. Throughout the course we'll be using a variety of date formats, just as a reminder that you have lots options when it comes to entering dates.	
Expiration Date	**01/25/2018**
Notice that in this sub-section, the **Previous** action button is available. If I select it, Tapestry will navigate back to the **VIN** sub-section. I still have the options to cancel or save the activity from this sub-section. However, with all required fields satisfied, I will select the **Next** action button to continue.	
	Select **Next** action button

Transfer Information	
Let's take a moment to evaluate the **Section Outline.** I have just finished the **Vehicle Details** section containing the **VIN,** and the **Vehicle Detail** sub-sections. Now I am in the **Ownership** section which contains first, the **Transfer Information** sub-section. Here is where I add purchase information for this vehicle. At this time there are two required fields and two uneditable fields. Depending on the **Purchase Type** selected, additional fields may appear or the other fields may disappear. In this case, the vehicle was purchased from an individual here in New Mexico.	
Purchase Type	Select drop-down arrow
Purchase Type	**In State Transfer**
Notice that **Purchase Date** is still required, but now the **Purchase Price** is also required. Additionally, Tapestry has added an NADA Value field.	
Purchase Date	**07-25-2017**
Purchase Price	**2400**
The NADA Value field pre-populates due to the interface Tapestry has with NADA. If the interface does not return a value, I can select the NADA Value hyperlink to navigate to the NADA website. This will allow me to research the vehicle in question quickly. Tapestry evaluates the excise tax owed based on the Purchase Price and NADA Value fields. Tapestry will make its calculation on whichever value is higher.	
	Highlight **Add Additional Transfer** hyperlink
Notice the **Add Additional Transfer** hyperlink. This will be used for double, triple, or other multiple transfers. However, in this case there are no additional transfers and I can continue to the next sub-section.	
	Select **Next** action button

Owner Information	
This next sub-section is where we will enter **Owner Information.**	
Proof of Identity	
Use drop down to select **Proof of Identity**	Select **Driver's License**
Tapestry wants to know what identity document customer is using. Notice that the **Owner Type** has already been selected. Recall that I was asked to select a primary owner type in the **Vehicle Detail** sub-section. If the primary owner type is not what we see in this field, it will be necessary to navigate back to that **Vehicle Detail** sub-section to select a different primary owner type. In this case, the new primary owner is, indeed, an individual. The next field is **Credential State.** This field defaults to New Mexico; it is a green, editable field. If the owner presents a credential from another state, it can be changed.	

Next, it is necessary to enter information into at least 1 of the following 3 fields. The first two fields, **Credential Number** and **SSN** will enable Tapestry to search its database for a matching individual. If an individual is located, Tapestry will pull that individual's information into the vehicle activity from the credential account or non-driver profile.

Owner Information (cont.)	
For example, I am going to enter the owner's NM credential number and tab off of it.	
Credential Number	**020000155**
	Select **Tab** key
Notice that when I tab-off the **Credential Number** field, the **SSN** field, and **No ID** fields are no longer required. If the owner did not select to provide their credential number, I could have also entered their Social Security Number. Alternatively, if they provided no ID, I could have denoted that by selecting the **No ID** checkbox. I mentioned that entering the **Credential Number** would allow Tapestry to find the individual and pull in their information. This is best practice for two reasons. First, it saves time and typing for Tapestry to pull in the owner's information. Saving typing will reduce data entry errors. Secondly, Tapestry will link the **Vehicle Ownership** account to the **Individual Customer**. To initialize this search of Tapestry, select the **Search for Owner** action button.	
	Select **Search for Owner** action button
This sub-section has been populated with significantly more information. The owner's social security number, name, and date of birth fields' auto-populate and are not editable. If the information displayed doesn't match the owner's ID, double check the credential number that was entered. If there was a data entry error, use the **Clear Owner Information** action button to clear these fields and re-enter the correct credential number. In this exercise, however, the primary owner is indeed Thomas Edward Jermain. Below these un-editable fields, there are fields that can be changed.	
	Highlight **DBA** field
First there is a **DBA** field. If Thomas wanted to use his vehicle for business purposes, but didn't want the business to actually own the vehicle, I could enter the name of his business here.	
	Highlight **Veterans Certificate Number** field
Next is **Veterans Certificate Number** field. Veterans are allowed discounted rates on their vehicle and vessel registrations, with some restrictions. By entering a Veteran's Certificate Number, Tapestry will know to apply the discount when calculating the owner's fees. The next fields are for the owner's contact information, their **email address** and **phone number**. If such information is available on the owner's credential account, Tapestry will pull it in along with the owner's name, SSN, and birthday. It is possible to update this information for the vehicle's records. However, it is important to note that changing this contact information here does not change it on the owner's credential account. The **View Existing Customer** hyperlink allows you to navigate to the **Individual Customer** springboard whose information populated above.	
	Highlight **Add Additional Owner** hyperlink

Below the contact information, there is a hyperlink labeled **Add Additional Owner.** Select this hyperlink to add secondary owners to the vehicle. Before we add secondary owners to this vehicle, first notice the **Title Assignment** section at the bottom.	
	Highlight **Title Assignment Line 1**

Owner Information (cont.)	
It currently reads **Jermain Thomas Edward** reflecting the name of the primary owner at the top. Watch how this title assignment changes once we add another owner.	
	Select **Add Additional Owner** hyperlink
Tapestry begins to build a table of additional owners. With this table you can add additional records with the **Add Record** icon and deleting records with the **Delete Record** icon. First, I must select the **Owner Type** for this secondary owner. For this exercise, it will be another individual.	
Owner Type	**Individual**
Notice that once I select Individual, Tapestry displays the same fields we saw above. These fields will differ, depending on which owner type is selected. Next, I must select the relationship between the owners: AND or OR	
Relationship	**AND**
Now I can enter the credential state and number for the secondary owner. However, just like with the primary owner, we can also collect their Social Security number or no ID at all. **If they ask:** This state field doesn't default to New Mexico, because only the primary owner needs to be a New Mexico resident. For this exercise, the secondary owner also has a New Mexico credential.	
Credential State	**NM – New Mexico**
Credential Number	**020000074**
Again, in order for Tapestry to search the database for this credential number, I need to select the **Search for Owner** action button.	
	Select **Search for Owner** action button.
As we saw before, Tapestry pulls in the personal and contact information associated with that credential account. Notice how the Title Assignment has changed.	
	Highlight **Title Assignment** lines
The **Title Assignment** now reflects both owners in the order that they were added in this sub-section.	
	Highlight **Manual Assignment** hyperlink
If the title ought to read some other way, use the **Manual Assignment** hyperlink to make the title assignment lines editable. As a special note, the character limit per line for the Title Assignment is 40 characters per line with Tapestry.	

I can add as many owners as I want to the vehicle by selecting the **Add Additional Owner** hyperlink, but we're going to stick with just these two.

Owner Information (cont.)	
If for some reason, Tapestry does not pull in the correct information and you realize that it is because you miss-keyed either the credential number or SSN, select the **Clear Owner Information** action button. This is the only way to edit those fields once you've searched Tapestry. Then, you'll be able to research Tapestry by re-selecting the **Search for Owner** action button. The last field on this sub-section asks about the signatures required on the title in order to transfer it.	
	Highlight **Are all required signatures captured?** hyperlink
Both signatures of the owners are required because of the "and" relationship between them. If I select **No** . . .	
Are all required signatures captured?	**No**
. . . I get a hard error notifying me that I must collect all of them. So I will select **Yes** to reflect that I do have both signatures.	
Are all required signatures captured?	**Yes**
With all fields in the Owner Information sub-section satisfied, I can proceed by selecting the **Next** action button.	
	Select **Next** action button

Owner Address	
The next sub-section is the **Owner Address** sub-section. Just as Tapestry pulled in the owner's personal information from the credential number I entered, it also pulled in the **Owner Physical Address** from the primary owner's credential account. You'll notice that the **Single Line** field is green and editable. However, just as with the contact information in the previous sub-section, changing address information in this activity will not affect the addresses on the credential account.	
	Highlight **Owner has same Mailing Address?**
If the credential account has both a residential address and a mailing address, they will both pull in from the credential – as you can see here. The last field in this sub-section refers to the **Owner Renewal Address**.	
	Highlight **Owner has same Renewal Address?**
If the owner would like to receive their renewal notices at an address different from either their physical or mailing addresses, select **No** from the drop-down to enter that address.	

In this example, the primary owner knows they will be in California when his renewal notice will be sent out. So I will select **No** from the drop-down menu and you'll see that the typical Tapestry address fields display.	
Primary Owner has same Renewal Address?	**No**
Address fields for Vehicle Services will work exactly the same as they do for Driver Services. The **Attention** line is not needed and the address can be entered on a single line for efficiency. Also, Tapestry will check the address against the USPS database to verify it is a real address.	

Owner Address (cont.)	
One major difference between Driver Services addresses and Vehicle Services addresses is that some addresses in Vehicle Services can be out of state addresses. The Renewal Address is one example of this. Just be sure that if the address is out of state you enter the state abbreviation or the zip-code so that Tapestry doesn't limit its address search to cities in New Mexico.	
Single Line	**753 Hacienda Dr Camarillo CA**
Notice that the address does verify, even though it is an out-of-state address. The last element in this sub-section is a checkbox with the caption: **Commuter vehicle in Bernalillo County for 60 days or more**. If the vehicle is driven to Bernalillo County 60 or more days a year, it must adhere to that county's Emissions Compliance standards no matter where the owner's physical address may be. The vehicle does not fall into that category so I will not select the checkbox. However, we will see how Tapestry manages Emissions requirements in future exercise. With all of the address fields satisfied, I will select the **Next** action button to continue.	
	Select **Next** action button

Documents	
We've now completed the **Ownership** section and moved to the **Required Documents** section and **Documents** sub-section. This is the sub-section where we will scan and record the documents collected during the activity. Note the red text that tells us Scanning Required! Click to Scan. Let's select this hyperlink to simulate scanning now.	
	Select Scanning Required! Click to Scan hyperlink

Documents (cont.)	
Having “scanned” the documents we can select the **Complete Scanning** action button.	
	Select **Complete Scanning** action button
	Select **Next** action button

Registration	
Looking at our Section Outline, we can see that we've moved to another section – the **Registration and Fees** section. The first sub-section to complete is the **Registration** sub-section. The first question Tapestry poses is **Use Existing Plate?** If the owner already has a plate that they wish to use, perhaps a Prestige Plate or the plate from their previous vehicle, I would select **Yes** from this drop-down and then enter the Existing Plate Number. We will see this functionality in action in a later exercise. For now, we will proceed without an existing plate. The owner isn't entirely sure which plate they would like, perhaps the **Standard Yellow Plate.**	
Plate Type	**Yellow**
As with all drop-down menus in Tapestry, it isn't necessary to type in the proper name of the selection. Typing a portion of that choice will filter the menu to only the desired selection. Arrow down to or use your mouse to select **Standard Yellow Plate**.	
	Select **Arrow down** key
Before entering a Registration Term, suppose the customer wants to view that plate type. To display an image of the plate, select the **Plate Type** hyperlink.	
	Select **Plate Type** hyperlink.
To view other plate types, use the **Plate Type** drop-down in the **Plate Image** window to select another plate type. For example, the Breast Cancer plate.	
Plate Image Window	Select **Plate Type** drop-down arrow
Plate Type	Scroll to **Breast Cancer Awareness Plate**
Plate Type	**Breast Cancer Awareness Plate**
Even though the Plate Image window displays a Breast Cancer Plate, the **Plate Type** field in the activity still says Standard Yellow Plate. In order for this change to take effect, I need to select the **OK** action button within the Plate Image window	
	Select **OK** action button
Registration sub-section	Highlight **Plate Type** field
The Plate Type field has now updated to reflect the new selection. The next field in this sub-section is the **Registration Term**. As you know, different vehicles have different registration terms available to them.	
	Select **Registration Term** drop-down arrow
Since I am performing this transfer on a passenger vehicle, Tapestry will only allow me to select a 1 or 2 year registration.	
Registration Term	**2 years**
	Expire Date field
After entering the registration term, Tapestry automatically calculates the expiration date and enters it into the **Expire Date** field. Once all fields are completed, now select the **Next** action button to continue to the next sub-section.	
	Select **Next** action button

Plate Information	
The Plate Information sub-section assigns a specific plate number to the vehicle. This number is the next plate number in my inventory. Tapestry knows exactly which plates should be in my inventory and pulls them in sequentially. The three fields in this sub-section are gray and not editable. The **Plate Type** and **Description** fields populate based on my selection in the previous sub-section. In order to make a change to either field, I must return to the previous sub-section by either selecting it in the Section Outline or utilizing the Previous action button. The **Plate Number** is un-editable, because Tapestry controls the inventory. This means I cannot go flipping through the inventory at my desk until I find a plate number that the owner likes. There may be legitimate reasons why you cannot issue the pictured plate, however. This is when we can select **Missing**, **Damaged** or **Grab Next Inventory** action buttons.	
	Missing action button
If I go to my inventory and cannot locate the plate number that is pictured, I can select this **Missing** action button.	
	Damaged action button
If I find the plate number in question but find it to be damaged and un-issuable, I can select this **Damaged** action button.	
	Grab Next Inventory action button
If there is a legitimate business reason why the pictured plate number cannot be assigned to the vehicle, I can select this **Grab Next Inventory** action button. Doing so will require a manager to enter their credentials and approve skipping the plate. One example where this might be necessary is if the owner objects to a plate number which includes **666** in it. In this instance, let's suppose that I cannot locate **1000BC** in my inventory. The next plate number I have is **1001BC**. So in order to change the plate number in the activity, I will select the **Missing** action button.	
	Select **Missing** action button.
You can see that the plate number changes both in the picture and in the Plate Number field. What you can't see is that **1000BC** has now been marked as missing within my inventory and will not be pulled in the next time I issue a Breast Cancer Awareness Plate. Your manager *will* be able to see if you have marked several plates as missing or damaged so be sure you don't abuse this function in order to cherry pick plates for vehicle owners. (mildly threatening voice) Now that the correct plate number is being assigned to this vehicle, I will select the **Next** action button to continue.	
	Select **Next** action button

Fees	
The last sub-section with the **Registration and Fees** section is the **Fees** sub-section. In this sub-section we can see all the components of the fees the owner will be responsible for.	
	Highlight each bill item
This activity is comprised of four components: **Vehicle Excise Tax**, **Plate Fees**, **Vehicle Registration Fees**, and **Vehicle Title Fees**. Some of these fees include more itemized fees that can be viewed with the **Expand** icon at the far right of each line.	
Vehicle Registration Fees	Select **Expand** icon
Utilizing the **Expand** opens up to see the breakdown of the fees.	
	Highlight **Override Fees** header button
If it is necessary to override any fees, the **Override Fees** header button can be used along with a manager's approval to do so. After verifying the fees with the owner, I now have two choices: **Save** the activity for later or proceed to the **Summary** section. We need to have the owner verify that what we enter into Tapestry is correct. So at this time, you would send the information to the signature pad. By selecting the **Send Vehicle Verification** action button. We don't have any here in training so we'll simulate this step by selecting the **Bypass Signature Pad hyperlink**. This point in the activity is where I need to verify the owner has a method of payment. Once I submit the activity, it will create an open interaction that must be completed or reversed before closing my drawer at the end of the day. If I select the **Save** action button, the activity will be saved and the owner will have 90 days to return to any MVD facility office and complete the activity. If the owner has a form of payment, I will select the **Next** action button to proceed to the Summary section.	
	Select **Next** action button

Summary –
This is the **Summary** section. All vehicle activities in Tapestry conclude with such a section that briefly outlines the information that was recorded within the activity. For example, this activity pertains to a passenger vehicle with this VIN, this year/make/model, is owned by these people, and the total fees for the activity will be $217.00. Notice that there is no longer a **Save** action button. If it necessary to save the activity for completion at a later time, use the **Previous** action button or select the **Fees** sub-section in the Section Outline. There is also no **Next** action button. That is because this is the final section of the activity. Since this is the final section, the **Submit** action button is available! In this exercise, the owner does have payment, so I will select the **Submit** action button to finish the activity.

	Select **Submit** action button
By selecting the **Submit** action button, Tapestry creates a new Vehicle Ownership Account for this vehicle.	

Vehicle Customer springboard	
Since our activity started from the **Vehicle Customer** springboard, that is where Tapestry automatically navigated to. You should notice a few differences from when we first began. First, the Account number in the Customer Attributes section is no longer identified by a license plate number. At this time it is just a system generated number. Similarly, the Account ID that is blue and active in the **Accounts** sub-tab is the same system generated number. Secondly, the previous license plate number is grayed out, signifying that it is a historical record and inactive. Before I take a payment, I want to show you the **Vehicle Ownership Account** springboard. To navigate to that springboard, I will select the **Account ID** hyperlink here in the Customer Attributes section.	
WoCustomer Attributes section	Select **Act ID** hyperlink

Vehicle Ownership Account springboard
This is the Vehicle Ownership Account springboard. The Account Attributes section contains much of the same information as the Vehicle Customer springboard including the Title Number, VIN, Vehicle Details, and Vehicle Color. There is additional information as well. We see a Commence Date for the account, registration and insurances statuses, the Title Assignment, and an address for the owner. The registration status is in red type and listed as **Expired** because it has not yet been paid for. Until the balance has been resolved, the registration status will not be Active. To the right of the Account Attributes section is the Owners Section. This section will list the owners according to a specific hierarchy: Lessors, Lien holders, Primary owner, and Secondary owners. Since the activity we completed did not include a lessor or lien holder, we only see the Primary and Secondary owners. You'll note that their names are blue hyperlinks. If I were to select either name, I would navigate to that individual's customer springboard because Tapestry has created a link between their Individual Customer springboards and this Vehicle Ownership Account springboard. Finally, there are tabs and sub-tabs at the bottom of this springboard like the other account springboards you've seen throughout Tapestry. The **Registration** tab and sub-tab are what display by default. In it, there is a list of the **Account Registration History.** Since this is a brand new account, there is only one item in the list. It is a transfer and the listing includes information about when the registration will be valid, its expiration date, the plate type, plate ID, and which office issued the

registration. Notice that at this time, it is not a hyperlink. Before taking payment, we can't select it for more information. Finally, as time goes on, individual renews, replaces, or otherwise change their registration, this registration history will also grow.

Vehicle Ownership Account springboard (cont.)	
I will now take a payment by selecting the **Accept a Payment** action button at the top of this springboard.	
	Select **Accept a Payment** action button
At this time we are going to collect payment. We can accept **Cash**, **Check** or **Credit Card** for payment.	
Individual Payment Type	Select **Cash** hyperlink

Cashiering Payment	
I am going to accept $220.00 and then save the payment.	Enter in $220.00
	Select **Save** action button

Cashiering Interaction	
The Cashiering Interaction springboard shows that the Account ID is now represented by the recently registered Plate Number. The second thing to notice is the **Titles to Print** section. It gives you information about the title specifically. In particular, this is where the control number for the title is assigned. Just as plates can be missing or damaged, it is possible that title stock might also be missing or damaged with a manager override. If the title with control number displayed falls into either situation, selecting the **Correct** hyperlink will allow you to print on different title stock. You'll notice that there is a **Print** hyperlink in the Titles to Print section. While that is one option for printing the title, selecting the **Quick Print** header button will still be the fastest print method.	
	Select **Quick Print** header button.
As you can see we have the Mail Print, we can select each one of our print by selecting the Print header button. This efficiency of printing is why we call it the **Quick Print** header button. Select **Print** action button to print each item, **Standard Title**, **Cashiering Receipt/Title Application Form** and the **Registration** document. Each item is broken into areas of what paper it will be printed on. Such as **Standard Title**-printed on Title stock paper, **Cashiering Receipt** and **Title Application** printed on plain white paper and **Registration** is printed on registration stock paper. The first print job will be for **Cashiering Receipt** and **Title Application**. At this time, you will load the white paper, registration stock paper, and title stock in the correct order and print all of them at once.	
	Close Registration **IE tab**
The second print job will be for **Registration** document forms for all vehicles being titled.	
	Close Title **IE tab**

Cashiering Interaction (cont.)	
The third print job is for **Standard Title** that will need to printed.	
	Close **IE tab**
	Select the **X icon** to close the print page
Returning to the Tapestry browser tab, we can see that some things have changed. To exit the Cashiering Interaction springboard and return to the springboard where you initiated your payment from, select the **OK** action button in the upper right corner.	
	Select **OK** action button

Vehicle Ownership Account springboard	
We are returned to the Vehicle Ownership Account springboard. Let's take note of how things have changed. 1) The balance is now 0. 2) There is now a Title status 3) The Registration status is now active and there is an Expires date above the Commence date. 4) The Account ID in the Account Attributes section has been replaced with the Plate number and Plate Type 5) In the Account Registration History, the type no longer reads Transfer; it is now considered a New Reg If we needed to see the details of the activity we just completed, we could select the New Reg hyperlink to view the activity. We can navigate back to the Vehicle Customer Springboard by selecting the VIN hyperlink within the Account Attributes.	
	Select **KMHDN56D05U177640** hyperlink

Vehicle Customer springboard	
On the Vehicle Customer springboard, there are also some changes to note. In particular, notice that the Vehicle Ownership Account we created by registering a new license plate to the vehicle is now denoted by that plate number – both in the Customer Attributes section and in the list of Accounts. We will look at additional features and information within the springboards in the next exercise. Return to the New Manager springboard by selecting this **Close All Managers** icon in the **Navigation Panel.**	
Navigation Panel	Select **Close All Managers** icon

Reminder: After 15 minutes of inactivity Tapestry will lock your session.

The Scenario:
Piper Ramsey is the owner of Beveled Mustang Woodworking. She recently took out a loan and purchased a vehicle for her business from another New Mexico resident. The title she has shows that she purchased it from *Horace Jasper* who previously purchased it from Julia Lawson. She would like to transfer the title and registration into her name.

In-State Title Transfer	
New Manager springboard	
As you recall in the last exercise, I started by accessing the Vehicle Management manager and after entering my VIN I was stopped. The good news is, that is the long way to perform an in-state transfer. We can bypass those steps by immediately accessing the Vehicle Customer springboard. Therefore, let's search for the following Vehicle Customer in the **Search** manager	
	Select **Search** manager

Search Manager	
There are a number of ways that we can efficiently search for a vehicle. We can search for a vehicle customer by their VIN. Since the new owner has presented the title to us, we have the VIN as a means to search for the vehicle, but, who wants to tediously type in a 17 digit number? That's why Tapestry allows us to search by the **Last 8 Characters of VIN** to make it faster.	
Search field	**8A039547**
Tapestry has returned 2 results. The first is a match to the **last 8 characters of a VIN**, as we expected. The second is for an individual who has an owner link with the vehicle bearing that portion of a VIN. Since we know that we would like to complete a vehicle transaction, we'll focus on the first result. Notice that there are two hyperlinks. Hyperlinks on the left of a search result navigate to customer springboards and hyperlinks on the right of a search navigate to account springboards. The **Vehicle Ownership** hyperlink is grey because the registration on this vehicle is expired. If you recall from my demonstration, I told you that all title activities take place on a **Vehicle Customer** springboard. Thus to do this New Mexico title transfer, we need to select the hyperlink that navigates to the **Vehicle Customer** springboard. Select with me now, the hyperlink which names the vehicle – it's year, make, and model.	
	Select **2008 Acur TL (PV)** hyperlink

Vehicle Customer springboard	
The first thing you'll notice on this Vehicle Customer Springboard is the indicator at the top of the Customer Attributes section.	
	Hover over **Vehicle Has Been Sold** indicator
This indicator is present because a previous owner submitted a **Notice of Vehicle Sold** form, but the title has not yet been transferred. That is the buyer's responsibility.	

Before we jump into the title transfer, let's explore the **Vehicle Customer** springboard more closely. As you saw in the demonstration, the Demographics tab and Accounts sub-tab display by default. This displays the current Vehicle Ownership Account ID, the expiration for that registration, the account's current balance. We also see the current owner's name and address. The next sub-tab is the Titles sub-tab.	
	Select **Titles** sub-tab
Here we can see information about all titles associated with this vehicle, past and present. It includes the type, issue type, status, application date, and issued date. If we needed to see what additional information appears on the title, we could select the **Title Number** hyperlink. Let's select the **Show History** header button to see if there are past titles associated with this vehicle.	
	Select **Show History** header button
Since no other titles display, we know that this title is the only New Mexico title this vehicle has had. Once we complete the Title Transfer, there will be another title and this one will be considered a historical record. Until now, the state has only stored the current title and registration so there will be no history to view at this time. Going forward, Tapestry will store all historical data as well as the current information. Let's move on to the Owners sub-tab.	
	Select **Owners** sub-tab
We only see a single owner, Julia Lawson, but let's select the **Show History** header button here as well to determine if there is a history of other owners.	
	Select **Show History** header button
As with the title, Julia is the only owner associated with this vehicle. Once we complete the Title Transfer, there will be another owner and this one will one considered a historical record. Last but not least, let's look at the odometer sub-tab.	
	Select **Odometer** sub-tab
Here we can see the details of all odometer readings for this vehicle. Note that the most recent odometer reading, captured when the vehicle was first titled in New Mexico is 175,424 miles. Let's now begin the title transfer by selecting the **Issuance Transaction** action button.	

Vehicle Customer springboard (cont.)	
	Select **Issuance Transaction** action button
We're trying to complete a title transfer, though, and that is still available. So let's select that **Transfer Title (and Registration)** hyperlink.	
	Select **Transfer Title (and Register)** hyperlink

VIN	
We are now on the **Transfer Title and Registration** activity springboard. Just like you saw in the demonstration, there is a **Section Outline** developing on the left. We are in the **Vehicle Details** section and **VIN** sub-section. Just as with the demonstration, we must first select a **Transaction Type** -- in this case a **Title Transfer.**	
Transaction Type	**Title Transfer**
Again, the new owner hands us the **Certificate of Title**.	
Document Acquired	**Certificate of Title**
Use the together exercise in front of you to enter the **Previous Title Number** and select New Mexico as the **Title State**.	
Previous Title Number	**1500102Z1001000**
Title State	**NM – New Mexico**
Tapestry does not check that the Previous Title Number matches the title number on the Vehicle Customer springboard, because they may have left New Mexico and returned with another state's title. All required fields in this sub-section are satisfied, so let's select the **Next** action button to proceed to the next sub-section.	
	Select **Next** action button

Vehicle Detail	
The next sub-section is the **Vehicle Detail** sub-section. Again, much of this information pre-populates from the Vehicle Customer springboard. Proceeding to the first required field, the **Primary Owner Type** for this vehicle will be a business.	
Primary Owner Type	**Business**
In this case, we're not going to change **Color 1** but since the vehicle was first titled, a second color has been added – Maroon.	
Color 2	**Maroon Burgundy**
We have an actual **Odometer Code** and can enter the mileage into the **Odometer Reading** field.	
Odometer Code	**Actual**
Odometer Reading	**17599**

Vehicle Detail (cont.)
Based on the **Odometer Reading** we entered, Tapestry has generated a hard-stop. The error flag explains that the reading must be greater than the previous reading. Recall that when we were looking at the Odometer sub-tab on the Vehicle Customer springboard, the odometer reading had been 175424 miles. It turns out, we mis-read the odometer statement and left off a 0 on the end. If we correct the reading, the hard-stop should disappear so that we can continue.

Odometer Reading	**175990**
This vehicle's distance is measured in miles so we do not need to change the **Units** field, and there are no **Brands** on the vehicle either. Moving down, this vehicle is not leased, so I will select **No** for that question.	
Is this a leased vehicle?	**No**
There is, however, a lien holder. So let's select **Yes** from the drop-down for that question.	
Is there a lienholder?	**Yes**
The new owner would like a registration as well as title, so we will leave the **Title Only** checkbox unmarked. Let's move on to Insurance Information. Use your exercise to enter the Company Name, Policy Number, Effective Date, and Expiration Date.	
Company Name	**Geico**
Policy Number	**72654146**
Effective Date	**08-25-17**
Expiration Date	**01-25-18**
With all fields in this sub-section satisfied, we can select the **Next** action button to continue.	
	Select **Next** action button

Transfer Information	
Suppose that after looking more closely at the title, we can see it is a double transfer. Julia Lawson actually signed it over to another owner before it was signed over to the new owner. In this case, enter the *most recent* **Purchase Type**, an individual – in state transfer.	
Purchase Type	**In State Transfer**
Then enter the most recent **Purchase Date** and **Purchase Price**	
Purchase Date	**08/01/2017**
Purchase Price	**7000**
Since my purchase price is less than the NADA value, Tapestry will then charge excise tax based on 80% of the NADA value. Now let's add information for the previous transfer by selecting the **Add Additional Transfer** hyperlink	

Transfer Information (cont.)	
	Select **Add Additional Transfer** hyperlink
Tapestry begins building a table to record transfers. Just as we saw with the Additional Owners table, this table behaves exactly the same as other tables you've seen throughout Tapestry. We have the same choices for the **Purchase Type** as with the most recent purchase. In this situation, it was another Individual – in state purchase.	
Purchase Type	**In State Transfer**
It is necessary to enter a purchase price for the original transfer, because Tapestry will calculate excise tax for both purchases.	
Purchase Price	**5000**
With all fields satisfied in this sub-section, let's select the **Next** action button to continue.	
	Select **Next** action button

Lien Holder	
We are now in the **Lien Holders** sub-section. As we'll see in a moment, this is to reflect the fact that a vehicle can have more than one lien holder. We're simply on the first. You may be wondering why I didn't have to address this sub-section during the demonstration exercise. This is because Tapestry generates this section based on our answer in the **Vehicle Detail** sub-section earlier in the activity. We are only seeing this here because we answered **Yes** to the lien holder question there. If it turned out that there was no lien holder, we don't need to navigate back to the Vehicle Detail sub-section.	
	Delete Lien holder action button
We can select this **Delete Lien holder** action button to remove the lien holder from the activity. There is a lien holder for this vehicle, though, so let's see what information Tapestry needs us to enter. First, we must enter the **Lien Holder Name**.	
Lien Holder Name	**Southwest Credit Union**
Then we need to enter the **Date Filed.**	
Date Filed	**08/25/2017**
Tapestry has generated a soft error. Recall that a soft error can either be corrected or reviewed before continuing. This error reminds us that statute says the file date should not be more than 10 days previous. While this error can be reviewed, effectively overridden, as a representative in the field it is best practice that you adhere to this statute and confer with your office manager if there is an exception. The error tells us to use today's date if the paperwork's date is more than 10 days past, so let's enter today's date 09/11/2017. One quick way to do this is using the Calendar icon and the Today action button.	
Date Filed	Select **Calendar** icon
	Select **Today** action button

Lien Holder (cont.)	
With the Date Filed field satisfied, we must now enter a Maturity Date.	
Maturity Date	**August 25 2020**
After providing the name of the lien holder and the dates associated with the lien, we need to enter the Lien Holder's address. The address functionality works the same here as in other places throughout Tapestry. The exception is that there is that Tapestry will allow you to enter an out-of-state address without special circumstances. Let's try that by entering Southwest Credit Unions address in Texas.	
Single Line	**1100 Commerce St Dallas Texas**
Remember, for out-of-state addresses, you must either provide Tapestry with both city AND state or simply zip-code. With all required fields satisfied regarding the lien holder, select the **Next** action button to continue.	
	Select **Next** action button

Lien Holders	
Let's take a moment to look at our **Section Outline.** We are now on the **Add a Lien Holder** sub-section. Above it, the sub-section no longer says "Lien holder", it is labeled with the lien holder's name. The sub-section we are currently gives us the option to add *another* lien holder. There is no limit to the number of lien holders a vehicle can have. However, it is not common to have more than one financial lien holder. So let's select the **No** action button to continue to the next sub-section.	
	Select **No** action button

Owner Information	
After entering lien holder information, Tapestry wants information about the vehicle's owner. Recall that we selected **Business** as the Primary Owner Type in the **Vehicle Detail** section. Therefore, Tapestry auto-populates the **Owner Type** field in this sub-section with Business/Non-Profit. Next we need to enter the **Legal Entity Type.**	
Does this business have an entity	**Yes**
Legal Entity Type	**LLC**
If the business is an owner for any other vehicle in Tapestry, we can pull in that business information just like we pull in individual owner information from a credential. We can enter the **CRS Id Number** and select the **Search for Owner** action button.	

Owner Information (cont.)	
So let's enter the **CRS Id Number** to see if Tapestry has any information to pull in from another vehicle's Ownership Account. Just as with a Social Security number, it is not necessary to enter the dashes.	
CRS Id Number	**13-318384-378**
	Select **Search for Owner** action button
Since the **Business Name** field does not populate, we know Tapestry does not have this business as an owner for another vehicle. So we'll enter it manually.	
Business Name	**Beveled Mustang Woodworking**
	Title Assignment section
Looking at the **Title Assignment** we can see that Tapestry has taken the business name and legal entity to populate the Title. The business owner would also like to be on the title for this vehicle. In order to add them, let's select the **Add Additional Owner** hyperlink.	
	Select **Add Additional Owner** hyperlink
So the **Owner Type** will be an individual and the owner would like the **Relationship** to be OR	
Owner Type	**Individual**
Tapestry generates the necessary fields for adding an individual owner, even before we select the **Relationship.**	
Relationship	**Or**
This individual does have a NM Credential, but she's willing to give us her **SSN**. So let's see how Tapestry can search for an individual based on that piece of information.	
SSN	**362-22-0047**
It is not necessary to enter the dashes when entering a Social Security Number within Tapestry and as usual, Tapestry masks the SSN once it is entered. Again, we'll need to tell Tapestry to conduct the search.	
	Select **Search for Owner** action button
Here we can see that Tapestry pulls in Piper Ramsey. We can also see that Tapestry has added her to the **Title Assignment** and the OR conjunction as well. There are no other owners to add to this vehicle so let's select the **Next** action button to continue.	
	Select **Next** action button

Owner Address	
Recall that the business owner for this vehicle is not currently in Tapestry. Therefore, Tapestry can't pull the business's address into this sub-section. So let's enter it into the **Single Line** field under Owner Physical Address.	
Single Line	**614 Arizona Ave 81082**
After tabbing off this field, we see that while the address verifies . . .	
	Highlight **Verified**

Owner Address (cont.)	
It turns out that the business and individual owner do have a New Mexico address to provide. So let's clear the address and enter the New Mexico address into the field.	
	Select **Clear Address** hyperlink
Single Line	**101 York Canyon Rd Raton**
There are two more address fields to satisfy before we can proceed. The first is whether or not the primary owner has the same Mailing Address. Since it is acceptable for a mailing address to be out of state, we will select No from the drop-down and enter that Trinidad, Colorado address from before.	
Is Owner's Mailing Address same as physical address?	**No**
Single Line	**614 Arizona Ave 81082**
Notice that Tapestry does not generate an error when entering an out-of-state address into the **Mailing Address** field. The business does not have a **Renewal Address** to provide so we will select YES from the drop-down menu.	
Primary Owner has same Renewal Address?	**Yes**
	Commuter Vehicle checkbox
As with the watch it, this vehicle is not a commuter vehicle to Bernalillo County for 60 days or more so we will leave this checkbox unmarked. With all address related fields satisfied in this sub-section, we can now select the **Next** action button to continue.	
	Select **Next** action button

Documents	
We've now completed the **Ownership** section and moved to the **Required Documents** section and **Documents** sub-section. This is the sub-section where we will scan and record the documents collected during the activity. The business did provide proofs of residency.	
Bill of Sale	Select **Collected** checkbox
Note the red text that tells us Scanning Required! Click to Scan. Let's select this hyperlink to simulate scanning now.	
	Select Scanning Required! Click to Scan hyperlink
If you have a scanner in your office you will select the **Scan** action button.	
Scan	Select **Scan** action button

Documents (cont.)	
Having "scanned" the documents we can select the **Complete Scanning** action button.	
	Select **Complete Scanning** action button
	Select **checkbox** for Bill of Sale
	Select **Next** action button

Registration	
Before we enter registration information into the activity, take a moment to observe the **Section Outline** and how it has grown since the beginning. Remember that we can select any of the sections or sub-sections to navigate back to those sections if we need to change or verify previously entered information. Presuming that everything is fine, however, let's start entering registration information into the activity. The business would like a **Standard Yellow Plate.** Let's select the **Plate Type** hyperlink in order to show Piper which plate she's selecting for her business.	
	Select **Plate Type** hyperlink
Like all drop-downs in Tapestry, you can either make a selection by scrolling through the choices or typing the selection directly into the field. Since this plate type will be towards the bottom of the list, let's begin typing in the name.	

Registration (cont.)	
Plate Type	**Yel**
You don't even need to type the entirety of "Yellow" before Tapestry filters directly to the desired choice. With **Standard Yellow Plate** highlighted in blue, in context, we can **tab** off the field to make that selection.	
	Select **Arrow** key down
And now Tapestry shows us a generic image of that plate. Let's select the **OK** action button to confirm our selection	
	Select **OK** action button
Tapestry automatically populates the **Plate Type** field with the selection we made. Next we need to select a **Registration Term** – Piper would like 2 years in this case.	
Registration Term	**2 Years**
Upon selecting a **Registration Term** Tapestry calculates the appropriate **Expire Date** and automatically populates it into that field. With all registration information fields satisfied, we can select the **Next** action button to proceed to the **Plate Information** sub-section.	
	Select **Next** action button

Plate Information	
Tapestry has searched the inventory assigned to you to determine the next Standard Yellow Plate in your possession. It turns out to be **511TLR.** Piper insists that she cannot possibly use a plate with 511 on it for her business's vehicle. This is one of those instances where you, along with a manager, can select the **Grab Next Inventory** action button. The business rules surrounding this option dictate that this should happen rarely and only for legitimate business reasons. That is why the manager override is necessary. Let's see how it works now.	
	Select **Grab Next Inventory** action button
Like I said, by-passing a plate number for a reason other than it is missing or damaged, requires a manager's override. Managers, after you have entered your own password and a note.	
Note	**Manager approved new plate**
	Select **OK** action button
With the manager override completed, Tapestry pulls in the *next* plate number: **512TLR**. Unlike when I marked the plate as **missing** in the demonstration, this does not remove 511TLR from your inventory. The next customer that selects a Standard Yellow Plate will be assigned **511TLR**.	

Plate Information (cont.)	
Managers will have a way to remove problem plates, like those containing 666, from inventory in order to avoid constant manager overrides. With an acceptable plate number assigned, we can select the **Next** action button to continue.	
	Select **Next** action button

Fees	
The final sub-section of the **Registration and Fees** section is the **Fees** section. Let's select the Vehicle Registration Fees **Expand** icon to see what makes up these fees.	
Vehicle Registration Fees	Select **Expand** icon
After informing the customer of the total, verify they have payment. If they cannot pay at this time, this is the sub-section where we can save the activity for finishing at a later time. Again, notice that in the **Fees** sub-section we do not have the **Submit** action button available. Assuming that Piper has the $483, select the **Next** action button to proceed to the **Summary** section. So at this time, you would send the information to the signature pad. We don't have any here in training so we'll simulate this step by selecting the **Bypass signature pad** hyperlink. There are no additional documents to collect so we can address the final element in this sub-section. We need to have the owner verify that what we enter into Tapestry is correct. Note that the Red X next to the action button has turned into a Green checkmark to show that the requirement has been satisfied. With all fields satisfied in this sub-section, let's select the **Next** action button to continue.	
	Select the **Bypass signature pad** hyperlink.
	Select **Next** action button

Summary	
This is the **Summary** section. All vehicle activities in Tapestry conclude with such a section that briefly outlines the information that was recorded within the activity. For example, this activity pertains to a passenger vehicle with this VIN, this year/make/model, is owned by this business and individual, and the total fees for the activity will be $483.00. Again, we're at the end of the transaction. Therefore the **Next** action button is not selectable. The **Save** action button is also no longer an option. You'll need to go back at least one section in order to save the activity. If everything is correct, select the **Submit** action button to complete the Title Transfer.	
	Select **Submit** action button

Vehicle Customer springboard	
Since our activity started from the **Vehicle Customer** springboard, that is where Tapestry automatically navigated to. You should notice a few differences from when we first began. First, the Account number in the Customer Attributes section is no longer identified by a license plate number. At this time it is just a system generated number. Similarly, the Account ID that is blue and active in the **Accounts** sub-tab is the same system generated number. Secondly, the previous license plate number is grayed out, signifying that it is a historical record and inactive. Let's look at the sub-tabs we investigated before starting the transfer to see how they have changed. First, the **Titles** sub-tab.	
	Select **Titles** sub-tab
Based on the sub-tabs counter and what we see there is only one title. In case you're thinking that doesn't sound right, after all the vehicle already had a title – shouldn't there be two now? Here we see the title we are in the process of issuing. Note that it does not have an Issued date yet, only an Application date. If we want to view the previous title, we need to select the **Show History** header button.	
	Select **Show History** header button
Now we can see the previous title. It is gray because it is inactive. We can also see that it's status is cancelled, and today's date is the Cancelled date. Let's move on to the **Owners** sub-tab.	
	Select **Owners** sub-tab
This sub-tab has been updated similarly to the Titles sub-tab. We can see the lienholder we just entered, the Business that is the primary owner, and the individual that is the secondary owner. We can even see that the relationship is an OR. If we want to see information regarding the previous owners, we can select the **Show History** header button to do so.	
	Select **Show History** header button
Now we can see Julia Lawson as well, but her record shows a Cease date for her ownership. Skipping down a few sub-tabs, let's select the **Odometer** sub-tab. It's counter shows a **2**.	
	Select **Odometer** sub-tab
Here we see both odometer readings, from the first title activity and the one we just completed. The reason one of them isn't grayed out is because the first is still a valid reading from that date – January 01, 2015. Since it is still a valid reading, it will not gray out and become a historical record. Before we take payment for this title transfer, let's navigate to the Vehicle Ownership Account springboard to see how it has changed.	
Customer Attributes	Select **Account ID** hyperlink

Vehicle Ownership Account springboard	
Notice the registration status is in red type and listed as **Expired**. It has not been updated with the new registration status because it has not yet been paid for. Even though the registration status is not yet active, the Owners Section has been updated to reflect the new lienholder and owners of the vehicle. Notice the **Account Registration History** in the Registration sub-tab**.** Since this is a brand new account, there is only one item in the list. It is a transfer and the listing includes information about when the registration will be valid, its expiration date, the plate type, plate ID, and which office issued the registration. We can now take a payment by selecting the **Accept a Payment** action button at the top of this springboard.	
	Select **Accept a Payment** action button
Individual Payment Type	Select **Cash** hyperlink

Cashiering Payment	
Let's enter $500 in the tendered field.	
Tendered	**500**
Tapestry will calculate our change as needed.	
	Select **Save** action button

Cashiering Interaction	
Notice the **Titles to Print** section. This is where the control number for the title is assigned. Verify the Control Number under the Titles to Print section is the same Control Number on the next Title Stock in your Inventory. If the title with the control number displayed falls into either situation, selecting the **Correct** hyperlink will allow you to print on different title stock. For this exercise, however, let's assume the title stock is fine and I can proceed to printing.	
	Select **Quick Print** header button.
Some of you may have received a message telling you the Web Browser is not currently allowing pop-ups. If so, select the Pop-Up icon in the URL bar. From there you will need to allow Pop-Ups for this site and open the print job PDF's. If you are having issues, let us know and we can make sure your settings are correct. The first print job, the furthest browser tab from Tapestry, is for any and all registrations.	
	Close Registration **IE tab**
The second print job is for any and all titles. At this time, you will load the title stock in the correct order and print all of them at once. Upon printing, double check to make sure the Control Number printed matches what was pre-printed on the Title Stock.	
	Close Title **IE tab**
The print job closest to the Tapestry browser tab prints anything else that needs to be printed on regular paper. Here we can see the pre-filled Vehicle Title/Reg Application and the cashiering receipt.	

Cashiering Interaction (cont.)	
	Close **IE tab**
Just as with Driver Services, to exit the Cashiering Interaction springboard and return to the springboard where you initiated your payment from, select the **OK** action button in the upper right corner.	
	Select **Ok** action button

Vehicle Ownership Account springboard	
We are now returned to the Vehicle Ownership Account springboard. Let's take note of how things have changed. 1) The balance is now 0. 2) There is now an Expires date in addition to the commence date 3) There is now a Title status 4) The Registration status is now active 5) The Insurance Status is now active 6) The Account ID in the Account Attributes section has been replaced with the Plate number and Plate Type 7) In the Account Registration History, the type no longer reads Transfer; it is now considered a New Reg. If we look at the **Owners Section** of the **Vehicle Ownership Account** springboard, you'll notice that the lienholder and primary owner are simply black text. Only the secondary owner, Piper Ramsey, is a hyperlink. This is because only she has a customer springboard within Tapestry. Let's select this hyperlink to see how it navigates to the **Individual Customer** springboard for this owner.	
Owners Section	Select **Piper Ramsey** hyperlink

Individual Customer springboard	
Here on the **Individual Customer** springboard I want you to pay attention to the **Accounts** sub-tab. Notice that there are two accounts listed. One is a Credential Account Type, Piper's NM Credential. The other is the **Vehicle Ownership Account**. However, you'll notice that beside the **Account** Id, the Plate Number, is a chain **Link** icon. This is to signify that this individual is ***linked*** to the **Vehicle Ownership Account**. That account does not ***belong*** to the individual. We can discuss this distinction more as the class progresses, but for now, let's navigate back to the Vehicle Customer Springboard by selecting the **Year/Make/Model/VIN** in the Navigation Panel	
Account ID	Select **512TLR** hyperlink
VIN	Select **19UUA66268A039547** hyperlink

Vehicle Customer springboard	
Here on the Vehicle Customer springboard, there are also some changes to note. In particular, notice that the Ownership Account we created by registering a new license plate to the vehicle is now denoted by that plate number – both in the Customer Attributes section and in the list of Accounts. Again, just as with Driver Services, I can return to the Search Manager by selecting the Close Group icon in the Navigation Panel. This will often be preferable to going back to the New Manager springboard because you will either want to search for another customer or initiate a new issuance transaction. Both can be done on the Search Manager, so let's select the **Close Group** icon together.	
Navigation Panel	Select **Close Group** icon

Out of State Title Transfer

Now that we've learned how to perform an In-State Title and Registration Transfer, let's look at the other type of transfer – one from Out-of-State.

The Scenario:
Baxter York and his daughter Fibi have come into the office to transfer a vehicle they purchased in Florida to New Mexico. At this time, they do not have New Mexico credentials, but they have brought sufficient proofs of identity and residency.

Out of State Title and Registration Transfer	
New Manager springboard	
We will begin Out of State Title Transfers from the **Vehicle Management** manager.	
	Select **Vehicle Management** manager

Vehicle Management	
Since we the vehicle in questions is not already in Tapestry, we will select the **Title (and Register) a Vehicle** hyperlink	
	Select **Title (and Register) a Vehicle** hyperlink

VIN	
Just as we saw with the title transfer, we have started a Registration and Title activity. AND, just as we've seen before, it begins with the Vehicle Details section and VIN sub-section. When I first started the watch it for the In-state Title Transfer, I was on a sub-section exactly like this where I needed to enter VIN information. Before we enter the VIN, however, notice this checkbox to the right of the VIN field. If the vehicle does not have a VIN, selecting this checkbox will tell Tapestry to generate a New Mexico assigned VIN. So let's enter the VIN:	
VIN	**3TMLU4ENXBM061529**
When we tab off or make a selection anywhere else within the springboard, the VIN becomes masked and a second, **Re-Enter VIN** field appears. We must enter the VIN again in order to ensure accurate keying. Note that it isn't possible to copy and paste in either of these fields. So, let's re-enter the VIN.	
Re-Enter VIN	**3TMLU4ENXBM061528**
We have received a hard error telling us that the VINs do not match. As you can see, Tapestry will not allow us to continue if the VINs do not match. In this case, it is best practice to clear the text in the **Re-Enter VIN** field and enter the VIN again.	
Re-Enter VIN	**3TMLU4ENXBM061529**
Now the error has been resolved. You will also notice that we're not getting a duplicate VIN error. This is one way we know for certain that this vehicle does not already exist within Tapestry.	

VIN (cont.)	
Moving on, we encounter a **Secondary VIN** field. If the vehicle type requires a secondary VIN, enter it into this field. As before, we must tell Tapestry what **Transaction Type** we would like to perform.	
Transaction Type	Select drop-down arrow
Even though **1st Time Title** is an option, it's important to remember that this vehicle *does* have title. We need to *transfer* it, so we will select **Title Transfer** from the three options.	
Transaction Type	**Title Transfer**
Upon selecting **Title Transfer** Tapestry generates three more fields. Since we chose **Title Transfer,** Tapestry auto-populates the **Document Acquired** field to be Certificate of Title. As with the In-State Title Transfer, it is necessary to enter the **Previous Title Number** and the **Title State.**	
Previous Title Number	**906880136322**
Be sure to enter the Title Number carefully. It will be checked against most recent Title information for this vehicle as reported to NMVTIS.	
Title State	**FL – Florida**
With all fields in the section satisfied, we can proceed by selecting the **Next** action button.	
	Select **Next** action button

Vehicle Detail	
As always, the **VIN** sub-section is followed by the **Vehicle Detail** sub-section. When we did the New Mexico Title Transfer together, many of these fields pre-populated with information from the previous title already in the system. This vehicle has no record in Tapestry, though, so where did Tapestry get this information? VINQuery. Tapestry interfaces with this database so that when a VIN is entered, VINQuery sends Tapestry the information it has in its database. Sometimes there is information VINQuery doesn't have and sometimes the information it has is wrong. For example, it didn't send a **Declared Gross Vehicle Weight**. So we will need to enter it manually.	
DGVW	**6500**
Let's suppose that VINQuery also has the incorrect number of **Cylinders** for this truck. In order to make changes to information VINQuery sends to Tapestry, select the **VINQuery Override** checkbox.	
	Select **VINQuery Override** checkbox
Notice how most of the fields auto-populated from VINQuery are now editable. Let's change the **Cylinders** for this truck from 6 to 4.	
Cylinders	**4**
Now we'll complete the rest of the details for this vehicle, starting with the vehicle class. Since the Vehicle Type is Truck, we must manually select which Class of Truck.	
Vehicle Class	**11 - Truck**
Primary Owner Type	**Individual**
Color 1	**White**
Odometer Code	**Actual**
Odometer Reading	**76,678**
The odometer on this truck is read in miles so we will not change the units and there are no brands to be added to the vehicle. This vehicle is not being leased and there is also no lienholder so we will answer **No** to the next two questions.	

Vehicle Detail (cont.)	
Is this a leased vehicle?	**No**
Is there a lienholder?	**No**
Now we can proceed to **Insurance Information**	
Company	**Allstate**
Policy Number	**235869**
This owner does not have insurance in New Mexico, but they do have insurance from Florida, so let's change the state from the default **NM** to **FL**	
State	**FL**
Tapestry has generated a soft-error that we need to either correct or review. It states that the **State does not satisfy NM Liability Requirements**. This means that without additional documentation, we cannot accept insurance from Florida. However, if the owner can show that their insurance does meet the liability requirements of New Mexico, we can select the **Review** icon and continue. In this case, the owner has brought in an Insurance Declaration to assert that their liability requirements are high enough. So we will review the error and continue.	
	Select **Review** icon
Notice that the **State** field now has a green triangle in the upper left corner to signify that the entry has been reviewed. Now we will enter the **Effective Date** and **Expiration Date**	
Effective Date	**Today's Date 09/11/2017**
Expiration Date	**02/11/2017 change to 2018**
	Select **Next** action button

Ownership Information	
The Owner must supply of listed documents in the **Proof of Identity** field.	
Proof of Identity	**Reservist Military ID**
In this scenario, the owners of the vehicle do not have New Mexico credentials and do not want to provide their Florida credentials. Even though they are *probably* not in Tapestry, it is best practice to search for them anyway. So let's enter the primary owner's **SSN** and search for it in Tapestry.	
SSN	**735-07-1134**
	Select **Search for Owner** action button
Tapestry did not pull in any information for the owner, so we will enter as much information as possible. Let's start with the required information, the **Last Name**	
Last Name	**York**
Entering a **Last Name** without a **First Name** generates a soft-error to confirm that the individual does not have a first name. In this case, the owner does have a **First Name** so we'll enter that before moving on to **Date of Birth.**	
First Name	**Baxter**
Date of Birth	**11-26-70**
Baxter does not have a DBA or Veteran's Certificate Number so we'll leave these fields blank. He is willing to provide his **Email Address** and a **Telephone Number** though, so let's enter those.	
Email Address	**BaxAndFibi@email.com**
Phone Type	**Home Phone**
Telephone Number	**505-152-2748**
Before we enter Baxter's daughter as the secondary owner, let's take a look at the **Title Assignment**. It currently reads York Baxter according to the name we entered above. Now let's enter his daughter, Fibi, as a secondary owner joined with AND by selecting the **Add Additional Owner** hyperlink.	
	Select **Add Additional Owner** hyperlink
Owner Type	**Individual**
Relationship	**And**
Like her dad, Fibi only has an **SSN** to provide us. So let's enter it into the **SSN** field and search for her in Tapestry as well.	
SSN	**637-55-3611**
	Select **Search for Owner** action button
As with Baxter's, Tapestry does not pull back any information for this Social Security Number, so we will enter Fibi's information manually. Since she and Baxter share an email address and phone number she declines to provide any additional contact information.	
First Name	**Fibi**
Last Name	**York**
Date of Birth	**4-2-99**
	Hover over **Title Assignment**
Now that we've added the secondary owner, the Title Assignment has updated to reflect the AND conjunction and the second name. Notice that Tapestry does not state **York** twice. If individuals on a title share a last name, Tapestry will save space by only listing the last name once.	

Ownership Information (cont.)	
Finally, we need to confirm the capture of required signatures on the Florida title. Then we can select the **Next** action button to continue.	
Are all required signatures captured?	**Yes**
	Select **Next** action button

Owner Address	
Since our Primary Owner is not already in Tapestry, the **Owner Address** sub-section contains more than just address fields. There is additional information to capture regarding proof of residency that is required since the owner did not provide a NM Credential.	
Proof of residency	Select drop-down arrow
The owner must provide 2 documents that prove residency. Tapestry wants to confirm that the owner has them here. Baxter did bring a bank statement and rental agreement.	
Proof of Residency Document	**Bank Statement**
Proof of Residency Document 2	**Rental or Purchase Agreement**
Now we can enter Baxter's physical address.	
Single Line	**1409 Girard NE Albuquerque**
	Select **Verified** hyperlink
	Select **apt a-e**
What unit will it be?	Enter **A**
We can continue to the **Mailing Address**. Baxter does have a mailing address, so in order for the mailing address fields to display, we'll select **No** from the drop-down. Then we'll be able to enter a mailing address.	
Is Owner's Mailing Address same as physical address?	**No**
Single Line	**21 Apple Ranch Rd 87059**
This address also verifies so finally we ask Baxter if he would like to add a Renewal Address. In this case he does not so we will select Yes from the drop-down menu.	
Is Owner's Renewal Address same as physical address?	**Yes**
Proving identity, residency, and entering verified address, all fields within this **Owner Address** sub-section are satisfied so we can select the **Next** action button to continue.	
	Select **Next** action button

Emissions Req
This is a sub-section we have not seen before. The reason we are seeing it in this exercise is because the vehicle meets the criteria for emissions compliance including age and vehicle type. Additionally, the physical address of the owner is in Bernalillo County which means the vehicle must meet the emissions requirements for that county.

Emissions Req (cont.)	
For the most part, it will not be necessary for you to enter information into the sub-section. Tapestry will interface with AirCare to determine if vehicles required to meet emissions requirements are in compliance. In that event you will simply select the **Next** action button to continue. **YOU WILL NOT NEED TO HAVE DOCUMENTATION OF THE EMISSIONS TEST IF AIRCARE PROVIDES AN EMISSIONS STATUS.** However, it is possible that AirCare's system might be down or that the emissions test results have not been uploaded to AirCare by the time the owner is trying to title and register their vehicle. In that case, this sub-section will appear like this: with the red warning message at the top that says **Emissions Status Not Found for VIN** In this exercise, we'll practice entering emissions test information manually. First, let's try to select the **Pass** selector button.	
	Select **Pass** selector button
Nothing is happening, because we need to select the **Input Emissions Manually** checkbox first.	
	Select **Input Emissions Manually** checkbox
Now we can select either the **Pass** or **Fail** selector button. If I select **Fail**, Tapestry generates a hard error because it is necessary for this vehicle to pass emissions requirements in order to be registered.	
	Select **Fail** selector button
So let's all select the **Pass** selector button.	
	Select **Pass** selector button
Then we'll need to denote if the emissions test is good for 1 year or 2 years. The documentation Baxter gives us says 2 years.	
	Select **2 Year** selector button
Finally, we need to enter a **Date Taken**	
Date Taken	**09/20/2017**
There are zip codes that register as being part of Bernalillo County but are actually split among Bernalillo, Sandoval, and Santa Fe Counties. If the owner can prove that they live in Sandoval or Santa Fe County, they will not need to meet emissions requirements. In this case, select the **Override Emissions Requirement** hyperlink. The override does call for a manager's credentials to be entered. With all fields in this sub-section satisfied, let's select the **Next** action button to continue.	
	Select **Next** action button

<table>
<tr><td colspan="2">Purchase Information</td></tr>
<tr><td colspan="2">Having completed the Emission Details section, Tapestry takes us to the Required Documents section. The first sub-section we need to address is the Purchase Information section. This section will have the same set up that we saw when we performed the In-State Title Transfer. So let’s start by selecting a Purchase Type.

Out of State Transfers will generally have one of four purchase types:
1) None – where the owner presents us with an OOS title in their name
2) Out of State Dealer – where the owner presents us with an OOS title from a dealer in another state
3) Out of State Transfer – where the owner presents us with an OOS title from another individual in another state
4) Gifted – paid no monies

These explanations might get confusing at times and new clerks will need time to assimilate this information. So to help you determine which Purchase Type is appropriate, select the Information Icon on the Purchase Type drop-down.</td></tr>
<tr><td>Purchase Type</td><td>Select Information icon</td></tr>
<tr><td colspan="2">Whenever we select the information icon on a drop-down menu list, an extra window displays with more information about the options in that drop-down. See how this list differentiates between OOS Dealer and OOS Transfer. We also have information on what Purchase Types will charge the customer Excise Tax. The nice thing about these windows is that you don’t need to close the window to continue. Simply select the option you’d like by selecting the hyperlink of the selection.</td></tr>
<tr><td>Purchase Type window</td><td>Select Out of State Transfer hyperlink</td></tr>
<tr><td colspan="2">Next we need to enter the Purchase Price and Purchase Date.</td></tr>
<tr><td>Purchase Date</td><td>01/25/2017</td></tr>
<tr><td>Purchase Price</td><td>$15,000</td></tr>
<tr><td></td><td>Select Next action button</td></tr>
</table>

Documents	
In the **Documents** sub-section we can see that all of the documents needed for this transaction have presumably been collected except for the **VIN Inspection**. Let's collect it now and mark it as collected, by selecting the appropriate checkbox.	
VIN Inspection	Select **Collected** checkbox
Upon selecting this checkbox, Tapestry needs to collect additional information about the VIN Inspector. First is the **Inspector Type**: Civilian or Law Enforcement. In our case, it is a civilian.	
Inspector Type	**Civilian**
Then Tapestry wants to know if it was an in-state inspection. This is because we need more information for In-State inspectors. This will default to **Yes**. Now we must enter the **Date of Inspection**. Remember, in-state inspections are good for 90 days and OOS inspections are good for 30 days. Let's see what happens if we enter a date into this field that is more than 90 days in the past.	
Inspection Date	**03/01/2017**
As you see, we get a hard error telling us that the VIN Inspection is no longer valid. It looks like we fat-fingered the date so let's correct it.	
Inspection Date	**09 20 2017**
This corrects the error and we can proceed. The next field is to enter the **Inspector Id Number**. Tapestry tracks New Mexico VIN Inspectors so you must enter a valid **Inspector Id Number.**	
Inspector Id Number	**1261**
Tapestry generates another hard stop, this time to tell us that the Inspector ID was not found. Let's correct the **Inspector Id Number**.	
Inspector Id Number	**126111**
If the VIN inspector is expired, Tapestry will not let you continue, but it doesn't generate a hard error the way an invalid inspector ID does. Scan documents!!! Let's select the **Next** action button to proceed.	
	Select **Next** action button

Registration	
Here we are in the **Registration** sub-section. The Yorks do not have a New Mexico plate to place on the vehicle so we will leave the **Use Existing Plate** field defaulted to **No.** We need to enter the Plate Type and Registration Term that the owner wants.	
Plate Type	**Turquoise Plate**
Registration Term	**1 Year**
As we have seen before, Tapestry automatically calculates the **Expire Date**. With these fields satisfied, let's select the **Next** action button to proceed to the **Plate Information** sub-section.	

	Select **Next** action button
Plate Information	
As always, the three fields in this sub-section are not editable. **Plate Type** and **Plate Description** auto-populate based on choices in the previous sub-section. The **Plate Number** populates based on your inventory. Let's suppose that when we go to pull the next plate from our inventory for this customer that we find the plate damaged. If we select the **Damaged** action button, the next plate in our inventory will be pulled in and this plated will be marked as Damaged in the background. It is not necessary to get a manager's approval for marking a plate as **Missing** or **Damaged**.	
	Select **Damaged** action button
The next plate number in your inventory is now assigned as the **Plate Number** for this vehicle. As long as this plate number is not missing or damaged, we can select the **Next** action button to continue.	
	Select **Next** action button

Fees	
Finally, we come to the **Fees** sub-section. There are more bill items in this sub-section that we have seen before. Notice how Tapestry lists out the various fees: Late Penalty, Excise Tax, Plate Fees, Registration Fees, and Title Fees. Verify that the owner has payment for the total amount due. ($759.20) If they do not, we would select the **Save** action button so that the activity will be available within Tapestry for the next 90 days. However, as long as the customer has a form of payment we can select the **Next** action button to continue.	
	Select **Next** action button
Bypass signature pad (customer verified info)	Select **Bypass signature pad**

Summary	
Now we can select the **Submit** action button to complete the Title Transfer. Since this vehicle did not exist in Tapestry prior to this activity, selecting the **Submit** action button creates a new **Vehicle Customer** as well as a new **Vehicle Ownership Account.**	
	Select **Submit** action button

Vehicle Customer springboard
Recall that in Tapestry, a customer is considered the highest, or outermost layer of the customer-account-activity structure. Consequently, Tapestry automatically navigates to the **Vehicle Customer** springboard once it is created. You can see in the **Customer Attribute** section what we entered into the activity. However, a Title Number has been generated by Tapestry.

Just as with the New Mexico Title Transfer activity, the **Vehicle Ownership Account** will remain a system-generated number until payment is taken. Similarly, no **Expires** date will display either. Without accessing any of the sub-tabs we can see by the counters that there is 1 title, 2 owners, and 1 odometer record. This is consistent with what we entered while completing the OOS Transfer. Let's access the **Vehicle Ownership Account** springboard before taking a payment.	
Accounts sub-tab	Select **Account ID** hyperlink

Vehicle Ownership Account springboard	
There is no **Registration** or **Title** status yet because we haven't accepted a payment, demonstrated by the balance shown in red text. In the **Account Registration History,** the New Reg account type is not yet a blue, selectable hyperlink. Let's select the **Accept a Payment** action button to complete the transaction.	
	Select **Accept a Payment** action button
We will be accepting a check for this payment.	
Individual Payment Type	Select **Check**hyperlink
Routing #	**112201218**
Account #	**548796**
Check #	**3658**

Cashiering Payment	
Select the **Save** action button to process the payment.	
	Select **Save** action button

Cashiering Interaction	
We now need to print our documents. What header button can be used to do this?	
	Select **Quick Print** header button
Once the documents have been printed, close the IE tabs.	
	Close Registration **IE tab**
	Close Application/Receipt **IE tab**
	Close Title **IE tab**
Finally, we'll return to the **Vehicle Ownership Account** springboard by selecting the **Ok** action button.	
	Select **Ok** action button

Vehicle Ownership Account springboard	
We are now returned to the Vehicle Ownership Account springboard. Let's take note of how things have changed. 1) The balance is now 0. 2) There is now an Expires date in addition to the commence date 3) There are now Title and Registration statuses 4) The Account ID in the Account Attributes section has been replaced with the Plate number and Plate Type 5) In the Account Registration History, the **Account Type** is now a blue, selectable hyperlink. Before returning to the **Vehicle Customer** springboard, notice the **Owners** section to the right of the **Account Attributes.** We see that Baxter York is the primary owner and his daughter is the secondary owner. His name is in hyperlink form, but hers is not. When individual owners do not initially exist in Tapestry, Tapestry will use the SSN of the primary owner to create a **Non-Driver Customer** shell. Let's select the **Baxter York** hyperlink to see what this looks like.	
	Select **Baxter York** hyperlink

Individual Customer springboard	
This springboard is an **Individual Customer** springboard. However, it was not created by entering citation information or creating a credential for Baxter. This **Individual Customer** was created the same time the **Vehicle Customer** and **Vehicle Ownership Account** were created. You'll notice that in the **Accounts** sub-tab, there is only one account and it is not a credential. It is the **Vehicle Ownership Account** identified by the Plate number. There is also an icon on this row. Look closely and you'll see that it resembles a piece of chain link. This is to signify that the Vehicle Ownership Account is *linked* to this individual – not *owned* by this individual. Let's take a moment to observe the **Navigation Panel.** Tapestry has put the **Vehicle Customer,** the **Vehicle Ownership Account** , and the **Individual Customer** in a single group to denote that they are all connected. Let's utilize the **2011 Toyota Tacoma TW** hyperlink to navigate directly to the **Vehicle Customer** springboard.	
Navigation Panel	Select **2011 Toyota Tacoma TW** hyperlink

Vehicle Customer springboard	
Now that the transaction has been paid for, we can see: • the system generated account numbers have been updated to display the vehicle's **Plate Number** • there is now an **Expires Date** on the account listing • below the title number are also a title type and an issued date Select the **Close All Managers** icon in the **Navigation Panel**	
Navigation Panel	Select **Close All Managers** icon

1st Time Title and Registration

While transfers will likely take up a large portion of your transactions, we must also know how to title and register a vehicle for the very first time. In other words, a vehicle that does not have a title from New Mexico or any other state. You will notice that much of this activity is similar to the previous activities we've completed. We want you to see how quickly they can go as you get more comfortable with them so we'll be going a bit faster through the sections you've seen before.

The Scenario:
Kaylee Frye has recently sold her vehicle to a dealership and is leasing a new vehicle from that dealership.

1st Time Title and Registration w/ Lessor	
New Manager springboard	
Since the vehicle to be titled and registered is not in Tapestry, we do not need to search for it in the system. We can proceed directly to a Launchpad containing the **Title (and Register) a Vehicle** hyperlink. You've now seen three ways to access the **Title (and Register) a Vehicle** hyperlink • The **Office Transactions** manager • The **Vehicle Management** manager • The **Issuance Transaction** action button via the **Search** manager Over time, you may find there is one method you prefer, but for the majority of our class exercises we'll be utilizing the **Office Transactions** manager. Let's select that together now.	
	Select **Office Transactions** manager

Office Transactions	
Again, select the **Title (and Register) a Vehicle** hyperlink	
	Select **Title (and Register) a Vehicle** hyperlink

VIN	
As with vehicles we entered into the Tapestry for the first time in an Out-of-State Title Transfer, the first step is to enter the VIN of the vehicle twice for accuracy.	
VIN	**3C4PDCGG6GT199687**
Re-Enter VIN	**3C4PDCGG6GT199687**
For the previous exercises, the Out-of-State Title Transfers, we selected **Title Transfer** from the **Transaction Type** drop-down menu. However since we do not have a title of any kind, we'll be selecting **1st Time Title** from the menu for this exercise	
Transaction Type	**1st Time Title**
The country auto-populates to **USA**, however it is possible to change this to another country if applicable. If another country is selected, Tapestry will then ask for specific documentation from the US Department of Transportation. For this exercise, we'll leave the country default to **USA.** As we've seen in previous exercises, we must now tell Tapestry which **Required Document** we have in hand. This is a brand new vehicle leased from a dealership so we will select a Manufacturer's Certificate of Origin from the drop-down menu.	
Document Acquired	**Manufacturer's Cert of Origin**
With all fields satisfied, we can continue. Now that you are getting more familiar with these transactions, I would like to refresh your memory on Hot Keys. Remember: any button in Tapestry that has an underlined letter can be selected using your **ALT** key plus that letter. For example, we see the **Next** action button has the **N** underlined. Therefore, if we select **ALT + N** simultaneously, the **Next** action button will be selected.	
	Select **ALT + N** keys simultaneously

Vehicle Detail	
In the **Vehicle Detail** sub-section, VINQuery has pulled in much of the information regarding this vehicle. We can see that it is a 2016 Dodge Journey. As we've seen in previous exercises, though, some information cannot be pulled in by VINQuery so let's enter information into those required fields now.	
Primary Owner Type	**Individual**
Color 1	**White**
Odometer Code	**Actual**
Odometer Reading	**578**
This vehicle is leased but there is no lienholder.	
Is this a leased vehicle?	**Yes**
Is there a lienholder?	**No**
This not a **Title Only** transaction or a **Homemade Vehicle** so we can leave the boxes unchecked. Now let's enter the **Insurance Information**.	
Company Name	**Farmer's Insurance**
Policy Number	**48782714**
Effective Date	**July 25 2017**
Expire Date	**January 25 2018**
With all the fields within the **Vehicle Detail** sub-section satisfied, let's continue. Let's try the Hot Key we learned in the last sub-section.	
	Select **ALT + N** keys simultaneously

Ownership Information	
When we did the New Mexico Title Transfer together, there was lienholder. If you recall, Tapestry had a separate sub-section for lienholder information. When there is a lessor, as in this exercise, there is NOT a separate sub-section for lessor information. This is because a lessor is a true owner of the vehicle where as a lienholder only has a financial interest in the vehicle. Therefore, since a lessor is an owner we enter lessor information into the **Owner Information** sub-section.	
Proof of Identity	**Driver License**
Lessor Name	**Medline Auto**
The next required field is for the leasing company's **CRS Id Number**. This field is required because satisfying this field signals Tapestry not to charge excise tax and because the **CRS Id Number** will be necessary to complete the **Notice of Vehicle Sold** activity when the vehicle is sold.	
CRS Id Number	**33-849847-384**
Next we enter information about the lessee as if they were a regular owner. She hands us her New Mexico credential so we can search for her using that number.	
Credential Number	**020000228**
	Select **Search for Owner** action button
Tapestry has pulled in Ms. Frye's information from her credential. She didn't provide an e-mail address or phone number when she got her credential, but is willing to provide them today.	
Email	**KLFrye@email.com**
Phone Type	**Cell**
Telephone Number	**505-781-3761**
	Title Assignment
Looking at the **Title Assignment**, we can see that Medline Auto is listed first, the Lessor, and that Kaylee Frye is listed second as the Lessee. This is a good example where manually adjusting the Title Assignment will make it easier to read. So let's select the **Manual Assignment** hyperlink to change the **Title Assignment**.	
	Select **Manual Assignment** hyperlink
The Title Assignment fields are now editable. Let's move the Lessee's name to **Title Assignment Line 2.**	
Title Assignment Line 1	Remove **FRYE Kaylee**
Title Assignment Line 2	Add **FRYE Kaylee** before **LESSEE**
It is always best practice ensure you spelled the name accurately when manually entering information into the Title Assignment Line to avoid miss-keying. Having changed the **Title Assignment** and satisfying any required fields, let's select the **Next** action to continue.	
	Select **Next** action button

Owner Address	
Just as Lessor information was added within the **Owner Information** sub-section, Lessor address information will be added in the **Owner Address** sub-section. This information does not pull into Tapestry automatically so we'll need to enter it manually.	
Lessor Residential Address – Single Line	**4100 Wolcott Ave NE Suite A 87109**
The Lessor does not have a separate mailing address so we'll select **Yes** from the drop-down menu.	
Lessor has same Mailing Address?	**Yes**
Moving down to the Lessee Physical Address, we can see that Tapestry has pulled in their *Albuquerque* address from their credential. Also, based on the credential, the Lessee's mailing address is the same as their physical address. There is no **Renewal Address** so we will select **Yes** from the drop-down menu.	
Is Lessor's Mailing address same as Lessor's physical address?	**Yes**
Is Owner's Renewal address same as Mailing Address?	**Yes**
With all address fields satisfied in this sub-section, select the **Next** action button to continue.	
	Select **Next** action button

Purchase Information	
We're about to enter **Purchase Information**, but didn't Tapestry pull in an Albuquerque address for the owner? Why aren't we entering information regarding **Emissions Requirements**? Although the customer indeed lives in Bernalillo County, the vehicle is brand new with an MCO. Therefore, emissions are not required. So far, we've entered Individual – In State, Out of State Transfer, and None as **Purchase Types**. This time, the brand new vehicle is being leased from a New Mexico Dealer. So we'll select that from the **Purchase Type** drop-down menu. Notice how the number of available fields changes with this selection.	
Purchase Type	**New Mexico Dealer**
Tapestry still asks for the **Purchase Date** and **Purchase Price**, but there are also fields to enter **Rebate** and **Accessories.** There is a field to record a **Dealer Trade-In Price** and finally a field to enter the **Dealer Number.** There is also a new hyperlink we haven't seen before that allows us to enter information about **Dealer Sales** or **Trade-ins.** Unlike our previous exercises there is no field for the vehicles **NADA Value**. This is we don't run NADA on brand new vehicles with MCOs. First let's enter the **Purchase Date** and **Purchase Price.**	
Purchase Date	**09/01/2017**
Purchase Price	**$20,995**
Ms. Frye did not get a rebate, but she did purchase an accessories package so we can enter that value in the **Accessories** field. Tapestry will calculate excise tax based on the **Purchase Price** plus the **Accessories.**	

In Case They Ask: The **Additional Fields** icon will allow you to enter you **Accessories** in the form of Transportation, Delivery, and Dealer Preparation costs.	
Accessories	**$2,790**
Purchase Information (cont.)	
Before we enter the **Dealer Number,** we should enter the information regarding Ms. Frye's sale to the dealer. Let's select the **Add Sale/Trade In** hyperlink to add that information.	
	Select **Add Sale/Trade In** hyperlink
This is a standard table that you've encountered throughout Tapestry. It allows for adding multiple records and deleting records as necessary. Let's enter the **Sale/Trade In VIN** for the vehicle Ms. Frye sold to the dealership.	
Sale/Trade In VIN	**JF1GPAL64CH230538**
	Select **Sale Type** drop-down arrow
Here we have a few choices, different types of transactions that transfer a vehicle to a dealer. For this exercise, Ms. Frye sold her vehicle to the dealership so we'll select **Sold to Dealer** from the drop-down.	
Next we need to enter the **Sale/Trade Amount**. She sold it for $8,417.	
Sale/Trade Amount	**$8,417**
With all the information regarding the Dealer Sale entered into the table, let's return to the last required field above: **Dealer Number**. All dealers will be registered within Tapestry and given a **Dealer Number**.	
Dealer Number	**4100**
With all fields satisfied, select the **Next** action button to continue.	
	Select **Next** action button
Tapestry generates an error: **Invalid New Mexico Dealer License Numbers.** Tapestry is going to check that the number entered matches a valid dealer within the system. If the number is not valid, Tapestry will not allow you to continue. We need to select the **OK** action button and correct **Dealer Number.** *Then* we'll be order to continue with the activity by selecting the **Next** action button.	
	Select **OK** action button
Dealer Number	**4010**
	Select **Next** action button

Documents	
Many of the necessary documents have been collected. We still need to tell Tapestry that we collected the **Dealer's Invoice**, though. Let's assuming Kaylee presents us with the document.	
Dealer's Invoice	Select **Collected** checkbox
Now we can simulate scanning of the documents as we have in previous exercises.	
	Select **Next** action button

Registration	
Kaylee would like another **Turquoise Centennial Plate** for a **2 Year** term. So let's choose that from the **Plate Type** drop-down menu.	

Plate Type	**Turquoise Centennial Plate**
Registration Term	**2 Years**
Tapestry will always calculate the **Expire Date** for us so we can select the **Next** action button and continue to the **Plate Information** sub-section.	
	Select **Next** action button

Plate Information	
Tapestry has populated the next **Turquoise Centennial Plate** in our inventory. Assuming that it is present and undamaged, let's select the **Next** action button to continue.	
	Select **Next** action button.

Fees	
We are now on the **Fees** sub-section displaying the Fee Breakdown. Here, we will verify that the owner has a form of payment before selecting the **Next** action button.	
	Select **Next** action button
Finally, we're ready to simulate **Send Information to Signature Pad.** Let's select that action button now.	
	Select **Send Information to Signature Pad** action button
The red x turns into a green check mark so that all fields in this sub-section are now satisfied. Let's select the **Next** action button to proceed.	

Summary	
Now we can select the **Submit** action button to complete the 1st Time Title and Registration activity. As with the out-of-state title transfer, selecting the **Submit** action button creates a new **Vehicle Customer** as well as a new **Vehicle Ownership Account.**	
	Select **Submit** action button

Vehicle Customer springboard	
You're becoming more comfortable with these **Vehicle Customer** and **Vehicle Ownership Account** springboards, so let's move straight to the payment.	
	Select **Account ID** hyperlink
Vehicle Ownership springboard	Select **Accept a Payment** action button
	Select **Cash** hyperlink

Cashiering Payment	
Let's enter $125 tendered and then select the **Save** action button to process the payment.	
Tendered	**125**
	Select **Save** action button

Cashiering Interaction	
Verify the Control Number under the Titles to Print section is the same Control Number on the next Title Stock in your Inventory. Then select the **Quick Print** header button to print our documents.	
	Select **Quick Print** header button.
Print the documents and close the PDF tabs within the browser.	
	Close Registration **IE tab**
	Close Title **IE tab**
	Close Application/Receipt **IE tab**
Since we accepted the payment from the **Vehicle Customer** springboard, Tapestry navigates back to that springboard upon selecting the **OK** action button.	
	Select **Ok** action button

Vehicle Customer springboard	
Ask the Class: How is the **Vehicle Customer** springboard different now that we've accepted a payment for the title and registration activity? Let's take a look at the **Vehicle Ownership Account** springboard before trying another exercise.	
Customer Attributes	Select **TLR808(Turquoise Plate)** hyperlink

Vehicle Ownership Account springboard	
We see here that the Title, Registration, and Insurance all have an active status once we take payment.	
	Highlight **Owners** section
Also, in our owners section we have two owners: The first in the hierarchy is the Lessor since they are legally the direct owner of the vehicle. The second is Kaylee. Her name is blue hyperlink because her Individual Customer springboard is linked to this Vehicle Ownership Account. Let's close the group for this vehicle in the Navigation Panel.	
Navigation Panel	Select **Close Manager** icon

Add/Release Lien

Liens can be both added and released using the same transaction in Tapestry. We can even add a lien and release one within the same activity.

The Scenario:
Three young ladies, an aspiring girl group, own a motorhome. At the moment, there is a lien on it. However, their record label has bought out that lien and replaced it one of their own. Josie, the leader of the group is in the office with documentation necessary to release the current lien and add a new lienholder to their motor home.

Add and Release Liens in Single Activity	
New Manager springboard	
When we transferred a title for an existing vehicle in Tapestry we used the **Search Manager**. When we requested a duplicate title for an existing vehicle in Tapestry we used the **Search Manager.** So if we need add and release a lien for an existing vehicle in Tapestry, which manager do you suppose we should start with?	
	Select **Search** manager

Search	
Even though we might predominantly search for vehicles by the **Last 8 of VIN** or the **Plate Number**, let's review how to search for a customer in Tapestry by their address. Since collect address information for a **Vehicle Customer** as well as **Individual Customers** we should be able to locate Josie's motor home via the address. Even though we do not need to use commas when entering addresses into the **Single Line** fields throughout Tapestry, we *do* need to utilize commas when searching for an address. This is so that Tapestry knows which parts of our search are the **Street, City, and State**.	
Search field	**502 Fitch St, Socorro, NM**
Tapestry has returned 4 results. 3 are residential addresses for individual customers in Tapestry. The fourth is an **Owner's Physical Address** for a Vehicle Customer. If we look closely at the search results for that vehicle, we can see that it is owned in part by a Josie McCoy. Let's select the **Vehicle Ownership** hyperlink to navigate to the **Vehicle Customer's** ownership account springboard.	
	Select **Vehicle Ownership** hyperlink

Vehicle Ownership Account	
Here on the **Vehicle Ownership Account** springboard we can see details about the vehicle as well as the registration. Notice the **Owners Section** of the springboard. There is 1 lienholder, Cactus Bank & Trust, and 3 individual owners. We need to add and release a lien to the vehicle. Since lienholders are listed on titles, but not registrations, this sort of task will be accomplished from the **Vehicle Customer** springboard. To navigate to that springboard, let's select the **VIN** hyperlink in the **Account Attributes** section.	
Account Attributes	Select **1GBG5U1215F516853** hyperlink

Vehicle Customer Springboard	
Looking at the **Customer Attributes** section, we can see some important information about the **Title.** Like our other customer based activities, we will begin adding the new lien and releasing the old lien by selecting the **Issuance Transaction** action button	
	Select **Issuance Transaction** action button
Let's select the **Add/Release Lien** hyperlink.	
	Select **Add/Release Lien** hyperlink

Add a Lien Holder	
Looking at the **Context Bar** we see this is a **Lien Add/Release** activity. Like the other activities we've seen so far, it begins building a **Section Outline** immediately. Since this activity can be used for adding liens, releasing liens, or both, Tapestry asks if we want to **Add a Lien Holder** in this sub-section. In this case we do so we'll select the **Yes** action button.	
Do you want to add a lien holder?	Select **Yes** action button

Lien Holder	
This sub-section is identical to the **Lien Holder** sub-section in any of the Title and Registration activities. You need to enter the **Lien Holder Name,** the **Date Filed** of the lien, and the **Maturity Date** of the lien. Then you'll need to provide address information for the lien holder. Let's complete this sub-section with the following information.	
Lien Holder Name	**New York Records**
We'll enter the **Date Filed** using 2 digit month, 2 digit day, and 2 digit year without separators.	
Date filed	**09/20/17**
Maturity Date	**04/30/2020**
Finally, let's enter the address. But let's practice entering it into separate fields. To change the entry method of the address, select the **Single Line** hyperlink.	
	Select **Single Line** hyperlink

Lien Holder (cont.)	
Now the address fields have been expanded into multiple street fields, fields to accommodate for a particular type of unit, city, state, and zip-code fields. Let's enter the following address:	
Street	**254 Canal St**
Unit Type	**Room**
Unit	**3002**
City	**New York**
State	**New York**
Zip	**10013**
Tabbing off the final required field of the address fields triggers the verification interface with USPS.	
	Select **Tab** key
The address verifies, satisfying all fields, so we can select the **Next** action button to continue.	
	Select **Next** action button

Add a Lien Holder	
As always, Tapestry will let us add as many lien holders as we need to. There is only one to add today so we'll select the **No** action button.	
Do you want to add a lien holder?	Select **No** action button

Owner Information	
The next section, the **Owner Information** section, displays information regarding all the registered owners. Only contact information can be changed in this activity. If changes are necessary, you will complete a Title Change activity which we will go over later in the course. Let's select the **Next** action button to continue.	
	Select **Next** action button

Current Liens	
In the **Current Liens** sub-section Tapestry displays the current liens for the vehicle, one at a time. The only question in this sub-section is whether to release it or not. In this case, Josie shows us documentation of the lien release so we will select **Yes.**	
Release Lien?	**Yes**
Once we select **Yes**, we have to provide the **Release Date**.	
Release Date	**7/31/2017**
With the **Release Date** entered, all fields in this sub-section are satisfied and we can select the **Next** action button to continue.	
	Select **Next** action button

Fees	
Since there are no other current liens on the vehicle, we proceed to the **Fee** section. In the **Fees** sub-section, just like always, verify that the owner has a form of payment. One difference in this activity from the others we've done is that there is no **Save** action button. Lien activities are so short that it isn't necessary to save them for later. We can easily complete this activity again if the owner lacks a means to pay the $5 fee. In this case, Josie does have payment so let's select the **Next** action button to move on to the **Summary** section.	
	Select **Next** action button

Summary	
On the **Summary** section for this activity we see different information than we've seen before. It lists the number of **Previous Lien Holders,** the lien that was released, the lien that was added, and the number of **Current Lien Holders.** No matter how many liens are added or released the fees will always be $5. If everything is correct, select the **Submit** action button to complete the activity.	
	Select **Submit** action button

Vehicle Customer Springboard	
Back on the **Vehicle Customer** springboard, notice that the active title does not have an **Issue Date** in the **Customer Attributes** section. We must first pay for the activity. Let's do that now.	
Plate	Select **55555RVZ** Hyperlink
Vehicle Account springboard	Select **Accept Payment** action button
Individual Payment Type	**Cash**

Cashiering Payment	
We're going to accept $10 in cash and **Save** the payment.	
Tendered	**5**
	Select **Save** action button

Cashiering Interaction	
And now we need to print the receipt and new title.	
	Select **Quick Print** header button
After verifying the control numbers match we can print the PDFs and then close the browser tabs.	
	Close IE Title tab
	Close IE Cashiering Receipt tab
And finally, we select the **Ok** action button to return to the **Vehicle Customer** springboard.	
	Select **Ok** action button

Vehicle Customer Springboard	
Let's select the **Owners** sub-tab to see how the activity affected the list of owners.	
Demographics tab	Select **Owners** sub-tab
Our list of owners has now been updated to include New York Records. If we still want to see information about previous owners, including previous lien holders, we can select the **Show History** header button.	
	Select **Show History** header button
Here we can see the owners listed on the previous title as a historical record. Let's try another exercise together. Instead of returning to the **New Manager** springboard however, let's return to the **Search** manager by closing the Group created in the **Navigation Panel**.	
Navigation Panel, 2005 Chevrolet C5U042	Select **Close Group** icon

Duplicate Title

On occasion, for a variety of reasons an owner might need a Duplicate Title.

The Scenario:
Marc Dixon has come into our office and requested a duplicate title on his 2011 Chevy Malibu.

Duplicate Title	
New Manager springboard	
Since Marc would like a Duplicate Title for an existing Vehicle Customer, we need to start locating the vehicle within Tapestry. In other words, we need to **Search** for the vehicle customer. Let's select the **Search** manager hyperlink to begin.	
	Select **Search** manager

Search Manager	
One of the easiest ways to search for a customer is to enter the last name comma the first name. Very few results will be returned with this method.	
Search field	**Dixon, Marc**
It pulled in 2 results, pulled in his Credential Account and the Vehicle Account and Customer Account. Since we are looking to complete a **Duplicate Title** activity, we will focus on the first result. There are two hyperlinks, though. Since title activities are most commonly done from the **Vehicle Customer** springboard, let's select the **2011 Chevy Malibu (PV)** hyperlink in order to navigate to that springboard.	
	Select **2011 Chevy Malibu (PV)** hyperlink

Vehicle Customer Springboard	
Before we request the duplicate title, let's see the titles Tapestry has for this vehicle by selecting the **Titles** sub-tab.	
Demographics tab	Select **Titles** sub-tab
Here we can see there is 1 STANDARD title. It is an original issuance, issued on July 31, 2015. Let's select the **Issuance Transaction** action button to begin the **Duplicate Title Request.**	
	Select **Issue Transaction** action button
As you may recall from our first exercise to transfer a New Mexico title, these activities relate directly to the vehicle's title, liens, status, and details. Let's select the **Duplicate Title Request** hyperlink to continue.	
	Select **Duplicate Title Request** hyperlink

Application Review
We are on another vehicle activity – this time a **Duplicate Title** activity. Our first sub-section in this

activity is **Application Review**. The questions in this sub-section are asked in such an order that you can be sure you've collected everything you need in order to give the customer a duplicate title. If you answer them carefully, Tapestry won't let you send a title out the door to someone who shouldn't have one. So let's start answering these questions:	
Application Reviewed?	**Yes**
The next question asks if we want to **Update Contact Information?** If we select yes, Tapestry will generate sub-sections where updates can be made. If we select no, Tapestry will skip those sub-sections. This is similar to how Tapestry doesn't make us look at a lienholder sub-section after we've told it there was no lienholder.	
Update contact Information?	**No**
Is this a registered owner?	**Yes**
We can't just take this guy's word for it that he is Marc Dixon. Tapestry next requires us to enter **Proof of Identity.**	
Proof of Identity	Select drop-down arrow
We can choose from **Owner's New Mexico DLN** or **Other ID Type**. If we select **Other ID Type**, we'll be able to select from a list that reflects your business practices with respect to acceptable forms of identification. Zack hands us his New Mexico credential, though.	
Proof of Identity	**Owner's New Mexico DLN**

Application Review (cont.)	
Owner DLN	**020000414**
	Select **Next** action button

Vehicle Duplicate Title	
The **Vehicle Duplicate Title** sub-section is not editable at all. This sub-section simply states what will be printed on the duplicate title. Again, if anything needs to be changed, this should be done through a difference activity. Let's select the **Next** action button to continue.	
	Select **Next** action button

Fees	
As we've seen before, this is the last sub-section where we can **Save** the activity for completion at a later time. All duplicate titles will have a $5 fee. After confirming this with the owner, select the **Next** action button.	
	Select **Next** action button

Duplicate Title
Finally, the activity culminates in the **Duplicate Title** section. This provides a summary of the title to be duplicated. To process the activity, select the **Submit** action button.

	Select **Submit** action button

Customer springboard	
We would like to collect our fees, so we're going to select our plate hyperlink and it brings us to the Vehicle Ownership account.	
	Select **503TLR hyperlink**

Vehicle Ownership springboard	
We can see in the **Accounts** listing of the **Accounts** sub-tab that there is now a $5 balance.	
	Select **Accept a Payment** action button
Individual Payment Type	Select **Check** hyperlink

Cashiering Payment	
Check	
Routing Number	**10722122141**
Account Number	**5412252**
Check Number	**5841**
	Select **Save** action button

Cashiering Interaction	
	Select **Quick Print** header button
This time we only get 2 PDF browser tabs because we are only printing the cashiering receipt and a title document. There will be no registration to print.	
Print Title Application and Title	Select **Print** header button on both
	Select **Close** icon for **IE** browser tabs
Mail Print	Select **X** icon to close
	Select **OK** action button

Account Ownership springboard	
Let's select the **Titles** sub-tab.	
Demographics tab	Select **Titles** sub-tab
In comparison to the first time we viewed this sub-tab, we can see that this is a **Duplicate** Issue Type and that the Issued date is today's date. In case you want to see the previous title, you would use the **Show History** header button.	
Navigation Panel	Select **Close Manager** icon

Registration Renewal

One the most commonly completed transactions for Vehicle Services is a registration renewal.

The Scenario:
Scott Royal has a vehicle that is about to expire. He gives me his plate number, so we can look up the vehicle.

Registration Renewal

New Manager springboard	
Since the action to be performed will be on an existing customer, I'll start by searching for that customer.	
	Select **Search** manager

Search	
As I said, Scott has provided me with the plate number for his vehicle. So I will search by that.	
Search field	**55556US**
Tapestry returns 2 search results, both for a 2014 Ford Explorer owned by Scott Royal. The first result shows a match for the Patriot plate and the second result shows a match for a combination of the plate and first 5 of the VIN. Under the Vehicle Ownership Account hyperlink, the expiration date shows this vehicle's registration expires on July 31st 2017. Since I am doing a transaction regarding the registration, I will select the Vehicle Ownership Account hyperlink.	
	Select **Vehicle Ownership** hyperlink

Vehicle Ownership Account
Notice the **Expires** date in the Account Attributes section. It is July 31, 2017. Tapestry will change the color of the **Expires** date when you're within 30 days of expiration to orange. There are a few things I'd like to point out here on the **Vehicle Ownership Account** springboard. There is an **Important** icon next to the **Expires** date and the text is orange. This color coding indicates that the registration is expired.

Vehicle Ownership Account (cont.)	
In the registration tab and sub-tab, the current registration is a **New Reg**. From here I can also easily determine the valid dates for this registration, the Expiration date, the Plate Type and ID, and which office issued the registration. Before I continue on to the Renewal, let's view **Scott Royal's** individual Customer springboard.	
Owners section	Select **Scott Royal** hyperlink
On Scott Royal's Individual Customer springboard, we can see two vehicles linked to him: the Ford Explorer I wish to renew as well as an Audi S4. We will see shortly how him being linked to two vehicles in Tapestry will affect our transaction. I am now going to close his Individual Customer springboard.	
Navigation Panel	Select **Close Manager** icon for Scott Royal
I am taken back to the last springboard I had open: The Vehicle Ownership Account springboard. So far, we've done activities that deal with the Title, so we've selected the **Issuance Transaction** action button on the **Vehicle Customer** springboard. Now we're working on the registration, or account, so I need to select the **Issuance Transaction** action button here on the **Vehicle Ownership Account** springboard. This action button will open a list of transactions relating to the registration and plates for this **Vehicle Ownership Account**.	
	Select **Issuance Transaction** action button
To renew the registration, I will select the **Vehicle Registration Renewals** hyperlink.	
	Select **Vehicle Registration Renewals** Hyperlink

Vehicle Detail	
This is the Vehicle Registration Renewal activity springboard. The first sub-section displays vehicle details for all vehicles owned by this owner. The top vehicle will always be the vehicle the Registration Renewal was initiated from. The **Renew** checkbox for this vehicle will also always be checked. Any other vehicles owned by the registered owner of the first vehicle will be listed below. Here, I can see that Scott also owns a 2015 Audi S4. Tapestry displays all vehicles owned by this owner so that we can renew all of them simultaneously. To add the Audi to the activity, I would simply select the **Renew** checkbox. We'll do this together in another exercise. For now, the Audi's registration doesn't expire until December, so we'll leave the **Renew** checkbox unchecked and continue with renewing only the Ford Explorer. When all vehicles to be renewed are marked with checks in their **Renew** checkboxes, the next step is to select the **Next** action button. As we've seen with other vehicle activities, we can also **Cancel** this activity. You'll notice there is no **Save** action button. This is because a renewal is such a fast transaction, it isn't going to save that much time by saving for later.	
	Select **Next** action button

Renewal Information	
Before I enter any information into this sub-section, let's examine the **Section Outline** more closely. We are currently in the **Ownership** section, the **Registration Information** sub-section. Moreover, there's what appears to be another **Section Outline** forming within this sub-section. This structure reflects Tapestry's ability to renew more than one registration at a time. The **Registration Information** sub-section we're currently in is specifically for the first vehicle listed in the **Vehicle Detail** sub-section. Within this **Registration Information** sub-section, we are in the **Renewal Information** section. At the top of this section is the **Title Assignment**. It is not editable, because this is only a registration renewal transaction. If a change to the title were necessary, I would need to complete a different vehicle activity. We can choose to Update Contact information by selecting yes or no. Another option I have in this section is to add a **Veteran's Certificate Number** which discounts registration fees for veterans. Mr. Royal is not a veteran, so I will not add a number to this field. Moving down this sub-section we come to **Plate Information.** There is the option to change plates when renewing a registration. In this case, Mr. Royal would like to switch to the Standard Yellow Plate, so we'll select **No** from the **Same Plate?** drop-down.	
Same Plate?	**No**
Since we entered **No,** Tapestry not only displays fields for **Registration Term** and **Expire Date** but also fields to select at **New Plate Type** or to **Use an Existing NM Plate**. First, Mr. Royal wants another 2 year **Registration Term**.	
New Plate Type	**Standard Yellow**
Same Plate?	**No**
Registration Term	**2 Years**
With all fields satisfied in this sub-section, we can proceed by selecting the **Next** action button. If Mr. Royal decided that he did want to renew his other vehicle's registration as well, that would be a good opportunity to select the **Previous** action button and return to the **Vehicle Detail** sub-section. Before we proceed, take a look at the **Section Outline**. At the moment, the sub-section we're on is the **Registration**	
	Select **Next** action button

Plate Information	
The **Plate Information** sub-section in a Registration Renewal works exactly the same way it does in other registration activities. The plate number is automatically populated based on my inventory. If the customer chooses at this point to change the plate type, that must be done in the **Renewal Information** sub-section. Also, we still have the **Missing, Damaged,** and **Grab Next Inventory** action buttons to utilize as needed. 511TLR is present and undamaged so I'm going to select the **Next** action button to continue.	
	Select **Next** action button

Donations	
This is the donations section. Here, customers have the option to donate to the **Veterans Fund** or **Children's Eyesight Fund**. If the customer would like more information about the funds, you can select the hyperlinks to view additional information.	
	Select **Veterans Fund** hyperlink
A Definition Box with a short description of the fund displays. To close it, select the **Close** icon or click anywhere outside of the box. We will not be taking any donations for the Veterans or Children's Eyesight Funds, so we will select $0 for each followed by the **Next** action button.	
Donate to the Veterans Fund?	Select **$0** selector button
Donate to the Children's Eyesight Fund?	Select **$0** selector button
	Select **Send Verification/Donations**
Now we can proceed to the **Fees** sub-section by selecting the **Next** action button.	
	Select **Next** action button

Fees	
After confirming the fees, verify that the customer has a form of payment. Even though we can't **Save** a renewal activity, we still need to verify the customer has a form of payment. If they do not, select the **Cancel** action button. It will be quick and easy to recreate the activity when they return. If they have payment, select the **Next** action button to continue.	
	Select **Next** action button

Summary	
Here you see a summary of the transaction. The balance that the customer owes shows in red, and the new **Expiration** date displays as well. We will now submit this activity so that we can accept a payment.	
	Select **Submit** action button

Vehicle Ownership Account	
With the other activities we've done, Tapestry automatically navigated to the **Vehicle Customer** springboard. That is because we began them from the **Vehicle Customer** springboard. For a Registration Renewal, we began the activity from the **Vehicle Ownership Account** springboard. So *that* is where Tapestry navigates upon **Submitting** the activity. Notice how this springboard has changed: 1) There is now a balance 2) There is now a **Renewal** transaction in the **Account Registration History** There are other things that have not *yet* changed because I have not taken a payment. 1) **Expires** date is still July 31, 2017 2) **Plate Number** is still 55556US 3) Based on the blue hyperlink, the New Reg is still the active Registration type. Once I take a payment, those things will change. I'm going to do that now by selecting the **Accept a Payment** action button and selecting the **Check** hyperlink.	
	Select **Accept A Payment** action button
Individual Payment Type	Select **Check** hyperlink

Cashiering Payment	
Routing Number	**107112122**
Account Number	**45412214**
Check Number	**5841**
Check Amount	**167.00**
	Select **Save** action button

Cashiering Interaction	
The payment has been processed and now I can print my documents by selecting the **Quick Print** action button.	
	Select **Quick Print** header button
This time, we only get a registration document to print and the cashiering receipt. There is no title document since the Registration Renewal has no bearing on the title. After printing the documents	
	Close Registration **IE** tab
	Close Cashiering **IE** tab
When we select the **OK** action button, Tapestry will navigate back to the **Vehicle Ownership Account** springboard.	
	Select **OK** action button

Vehicle Ownership Account	
See how things have updated with the payment. 1) The **Balance** is $0 2) **Expires** date is now September 30, 2019 3) **Plate Number** is now 511TRL 4) Based on the blue hyperlink, the Renewal is still the active Registration type.	
Navigation Panel	Select **Close Manager** icon

The Scenario:
Alan Roberts came into our office to get his registration, he states he never received a registration renewal reminder and has let the registration on his 1999 Chev C15 expire. He also wants to renew his 2013 Hyun Accent.

Registration Renewal (2 Vehicles at Once)	
New Manager springboard	
Since we are looking for an individual customer and their existing vehicle within Tapestry, where should we start?	
	Select **Search** manager
Alan has given us his license plate number to search for the vehicle.	
Search field	**DMS422**
Before we even enter a springboard, we can see from the **Vehicle Ownership Account** details displayed, that the 1999 Chev C15 registration expired as of May 31, 2018. We know this from the text and from the gray color of the **Vehicle Ownership** hyperlink.	
1999 Chev C15	Select **Vehicle Ownership** hyperlink

Vehicle Ownership Account	
You will notice the expiration date is red. Let's select the **Issuance Transaction** action button in order to begin the registration renewal activity.	
	Select **Issuance Transaction** action button
To issue the new registration, we will select the **Vehicle Registration Renewals** hyperlink.	
	Select **Vehicle Registration Renewals** hyperlink

Vehicle Detail	
Alan is an owner for both of these vehicles. His other vehicle is a 2013 Hyundai Accent. We're going to select both **Renew** checkboxes. Tapestry will walk us through the renewal process twice, once for each vehicle. The checkbox for the **1999 Chev C15** is already checked and cannot be unchecked. So we'll simply need to check the **Renew** checkbox and select the **Next** action button to continue.	
2013 Hyun Accent	Select **Renew** checkbox
	Select **Next** action button

Registration Information	
Looking at our **Section Outline** it is important to realize that this **Renewal Information** sub-section pertains only to the first vehicle, the 1999 Chev C15**.** Once we complete this sub-section, this sub-section will actually be renamed 1999 Chev C15. Alan would like to update his contact information. So we'll select **Yes** from the **Update Contact Info?** drop-down field.	
Update Contact Info ?	**Yes**
He also has a **Veteran's Certificate Number** to add.	
Veteran's Certificate Number	**19911421441**

Again, we have the option to keep the same license plate or we can change it. We can see that Mr. Alan Roberts has a Balloon Plate. For this vehicle he'd like to keep this plate. So we can select **Yes** from the **Same Plate?** drop-down field.	
Same Plate?	**Yes**
Now the **Registration Term** and **Expire Date** fields display. Alan would like a 1 year registration.	
Registration Term	**1 Year**
	Select **Next** action button

Owner Information	
We get the question: Is this the same person? The name on the credential does not match the name of the vehicle: Alan Dale Roberts. Yes it is the same person so were going to select Yes from the dropdown. Notice that the **Registration Information** sub-section in the **Section Outline** has updated to show we're working on the 1999 Chev C15. Alan is providing his cell phone number so let's enter that now.	
The name on the crediential does not match the name of the primary owner on the vehicle: Alan Dale Roberts	Select **Yes** from the dropdown
Phone Type	**Cell Phone**
Telephone Number	**505-658-2148**
	Select **Next** action button

Owner Address	
Alan would also like to provide a **Renewal Address**. So let's select **No** from the **Owner has same Renewal Address?** drop-down and enter the following address.	
Is Owner's Renewal Address same as Mailing?	**No**
Single Line	**906 Pearson Dr 88201**
Once the addresses is verified, check with the owner to determine if they use the vehicle to commute to Bernalillo County more than 60 days a year. If so, they will need to prove they are compliant with that county's emissions requirements. Alan does not go to Bernalillo County that often so we will leave that checkbox unmarked. We can now select the **Next** action button to continue.	
	Select **Next** action button

Donations	
If you recall from the previous exercise that I demonstrated for you, we had to go through a **Plate Information** sub-section. That was because we were selecting a new plate. In this exercise, we're using the same plate so Tapestry skips over that sub-section to save us time. In the **Fees** sub-section we ask Mr. Roberts if he'd like to donate to either of the funds. He is going to donate $1 to each of them. Once we mark those donations, we can select the **Next** action button to continue.	
Donate to the Veteran's Fund?	**$1**
Donate to the Children's Eyesight Fund?	**$1**

	Send Verification/Donations
	Select **Next** action button

Fees	
There are several more groups of fees in this activity. Again, these fees only represent the fees dealing with the 1999 Chev C15. We haven't told Tapestry anything about the other vehicle's renewal yet. Here we have **Donations, Registration Penalties** (since he was late), and the **Vehicle Registration Fees**. If we select the **Expand** icon for **Donations**. We will be able to see how $1 is going to each fund.	
Donations	Select **Expand** icon
If we select the **Expand** icon for **Vehicle Registration Fees** we can also see the credit for the **Veteran's Allowance.**	
Vehicle Registration Fees	Select **Expand** icon
Before we select the **Next** action button, we verify that Alan has a form of payment. If not, we select the **Cancel** action button so that he can return later to complete the activity. If he does have payment, we can select the **Next** action button to begin renewing the second vehicle's registration.	
	Select **Next** action button

Registration Information	
Looking at our **Section Outline** we can see that a new **Registration Information** sub-section has been started below the **1999 Chev C15** sub-section. Like before, Alan would like to add a cell phone number and renewal address. We must enter this update twice, because Tapestry does not link information between vehicles. They are independent entities and what happens to one does not necessarily affect another – even if they have the same owner.	
Update Contact Info?	**Yes**
Since he can receive the discount more than once, we will add her **Veteran's Certificate Number** in this sub-section as well.	
Veteran's Certificate Number	**19911421441**

Registration Information (cont.)	
This vehicle currently has a **Turquoise Plate**, but Alan would like to switch to a **Standard Yellow Plate.** So we will mark the **Same Plate?** field as no.	
Same Plate?	**No**
New Plate Type	**Standard Yellow Plate**
Registration Term	**1 year**
With all field satisfied, we can select the **Next** action button to continue.	
	Select **Next** action button

Owner Information
Notice that the **Registration Information** sub-section in the **Section Outline** has updated to show we're working on the 2012 Hyun Accent.

Remember to change his cell phone number so let's enter that now and then select the **Next** action button to continue.	
Same Person?	Select **Yes** from dropdown
Phone Type	**Cell Phone**
Telephone Number	**505-658-2148**
	Select **Next** action button

Owner Address	
Let's enter the **Renewal Address** just as we did on the previous vehicle.	
Is Owner Renewal Address same as Mailing?	**No**
Single Line	**906 Pearson Dr 88201**
Once the address is verified, check with the owner to determine if they use the vehicle to commute to Bernalillo County more than 60 days a year. If so, they will need to prove they are compliant with that county's emissions requirements. Alan will not be using this vehicle to commute to Bernalillo County either, so we can now select the **Next** action button to continue.	
	Select **Next** action button

Plate Information	
ASK THE CLASS: Why do you think Tapestry is showing us this **Plate Information** sub-section? **ASK THE CLASS:** What would we do if Alan changed his mind and either wanted a different Plate Type or keep his previous plate? Assuming this plate is present and undamaged, let's select the **Next** action button to continue.	
	Select **Next** action button

Donations	
Since Alan already made donations on the first vehicle's renewal, she is not going to make additional donations in this part of the activity. Once we mark those donations as $0, we can select the **Next** action button to continue.	
Donate to the Veteran's Fund?	**$0**
Donate to the Children's Eyesight Fund?	**$0**
	Send Verification/Donations
	Select **Next** action button

Fees	
Again, we want to verify that Alan has a form of payment before selecting the **Next** action button. Since he does have payment we can proceed to the **Summary** section for the entire activity.	
	Select **Next** action Button

Summary	
Here you see a summary of the activity – both vehicle registration renewals. It includes each vehicle's information, the **Plate Type**, the **Expiration** for each vehicle, and the **Total Fees**. This is our last opportunity to select the **Cancel** action button before creating an open interaction that must be resolved. Assuming that the owner can pay for the whole total, we will select the **Submit** action button to complete both registration renewal activities.	
	Select **Submit** action button

Vehicle Ownership Account	
Tapestry navigates back to where we started, the **Vehicle Ownership Account** springboard for the **1999 Chev C15.** There is now a balance, but the registration is still expired and listed in red text. The Renewal is not yet the active registration listed in the **Registration** tab and sub-tab. To accept a payment for this transaction, we select the **Accept A Payment** action button. Mrs. Darcy will be paying with cash.	
	Select **Accept a Payment** action button
Interaction Payment Type	Select **Cash** hyperlink

Cashiering Payment	
If we look at the **Interaction Bill Items** list, we can see that only bill items for the 199 Chev C15 registration renewal are present. We need to tell Tapestry to pull in the rest of the debt. Let's use the **Add Recent** header button to pull in the debt for the 2013 Hyun Accent registration renewal. The **Add Customer** allows you to search for existing debt even if you didn't do the initial transaction. This is useful if a customer does part of a transaction at one office and wants to pay at another. This will also be helpful if another clerk in the same office begins the transaction, but the customer ends up at your window. To pull in existing debt from transactions you performed that day, select the **Add Recent** header button.	
	Select **Add Recent** header button
Here you will see recent debt items performed by you. To add the debt for the Renewal of the other vehicle, select the Include checkbox and OK action button	
	Select **Include** checkbox
	Select **OK** action button
Tapestry closes the **Select Level** window and adds the bill items for that customer to the **Interaction Bill Items** list. Now we see the same balance we saw in the activity **Summary** section. Now we can take a payment as normal.	
	Select **Save** action button

Cashiering Interaction	
The Processing Bar will appear when taking payment for multiple bill items. Before we select the **Quick Print** header button, look at the **Letters** tab of this springboard. We can tell already that three documents are to print. Let's see how that plays out in the PDFs that generate.	
	Select **Quick Print** header button

Only 2 PDFs are generated for three letters. This is because Tapestry is going to print both registrations from a single PDF. We are looking at Registration documents PDF now. If we scroll down, we'll see that there are two. This is for the Chev. . . .	
Registration IE Tab	Scroll down
And this one is for the Hyun Assuming that we've printed both PDFs, let's close the browser tabs to return to the **Cashiering Interaction** springboard.	
	Close **Registration** IE tab
	Close **Cashiering** IE tab
As you can see, all three letters printed today. Select the **Ok** action button to return to the **Vehicle Ownership Account** springboard associated with the 1999 Chev C15**.**	
	Select **OK** action button

Vehicle Ownership Account	
Now on this springboard we can see that the **Balance** is $0, the **Expires** date has been updated for the renewal, the **Registration** status is now active, and the **Renewal** is the active registration listed under the **Registration** tab and sub-tab. To see similar results on the other vehicle's **Ownership Account** springboard, we need to navigate to **Alan Robert's** individual customer springboard by selecting the hyperlink of his name in the **Owners** section of this springboard.	
	Select **Alan Roberts** hyperlink

Individual Customer	
Even before selecting the **Account Id** hyperlink, we can see that the account for the 2013 Hyun Accent has an **Expires** date of 1 year from this month and a $0 **Balance**. Let's select the **Account Id** hyperlink, characterized by the **Plate Number** to verify that status of the registration.	
2013 Hyun Accent	Select **Account Id** hyperlink

Vehicle Ownership Account	
Sure enough, the **Registration** is active and the **Renewal** is the active registration. Let's return to the **Search** manager to do one more together exercise. To navigate to the **Search** manager most efficiently, let's select the **Close Group** icon for this group that consists of Alan Roberts and the two **Vehicle Ownership** accounts he is linked to.	
Navigation Panel	Select **Close Group** icon

Duplicate Registration

Now that we've learned how to do a Registration Renewal, let's learn how to complete a Duplicate Registration request.

The Scenario:
Linda Christopher has come in to get a duplicate registration for the vehicle owned by herself and her husband, James. She has brought in her vehicle title.

Duplicate Registration	
New Manager springboard	
If I want to create a duplicate of something that means it already *exists*. So if I need to find an *existing* registration in Tapestry, where should I start?	
	Select **Search** manager

Search	
Linda doesn't have a registration, but she has brought in the vehicle's title. So we can search by the **Last 8 of VIN**.	
Search field	**CH262569**
Tapestry returns 3 search results. One is for a **Last 8 Characters of VIN** match to a 2012 Dodge Charger. The other two are individuals are owners linked to a vehicle with that portion of a VIN. We will navigate to the **Vehicle Ownership Account** springboard?	
	Select **Vehicle Ownership** hyperlink

Vehicle Ownership Account	
Here we can see that the Registration is still active and not set to expire until July 31 2019. Just as with the other activities we've done, we're going to find the **Duplicate Registration** request by selecting the **Issuance Transaction** action button.	
	Select **Issuance Transaction** action button
This time, we'll select the **Duplicate Registration Request** hyperlink.	
	Select **Duplicate Registration Request** hyperlink

Owner Information	
This is a quick transaction. Unlike Duplicate Title, we don't have to worry about what owners are present. You simply need to enter **Insurance Information** and determine if there is a need to **Update Contact Info**. As with other activities we've worked today, Tapestry only displays the **Owner Information** sub-section if we elect to change owner information in some way. If we had answered **No** to **Update Contact Info?** Tapestry would not make us go through this sub-section. Linda wants to provide an updated phone number for her husband and a renewal address. Before we get to the **Owner Address** sub-section, let's update her **Phone Type** and **Telephone Number.**	
Primary Owner Phone Type – James Christopher	**Home Phone**
Telephone Number – James Christopher	**505-687-1487**
Having changed James's phone type and telephone number, let's select the **Next** action button to proceed to the **Owner Address** sub-section.	
	Select **Next** action button

Owner Address	
We see the **Owner Physical Address** at the top and are going to leave it alone. Linda would like us to enter a **Renewal Address**. So we'll change the response to **Owner has same Renewal Address?** to **No**	
Owner has same Renewal Address?	**No**
As we've seen before, answering **No** to this question opens several other fields for entering an address. Let's enter the **Renewal Address** together.	
Owner Renewal Address – Single Line	**885 Pecos St Las Vegas**
The address verifies so we can select the **Next** action button to continue.	
	Select **Next** action button

Fees	
We are already in the **Fees** sub-section. That's how quick this transaction can be. We verify that Linda has the $5 to pay for the transaction and then select the **Next** action button to proceed to the final section.	
	Select **Next** action button

Duplicate Registration	
In the **Duplicate Registration** section we see a summary of the activity. After verifying everything is correct, we'll select the **Submit** action button to finish the activity and navigate back to the **Vehicle Ownership Account** springboard.	
	Select **Submit** action button

Vehicle Ownership Account	
Let's **Accept a Payment** to complete the transaction with a **Cash** payment of $5.	
	Select **Accept a Payment** action button
Individual Payment Type	**Cash**

Cashiering Payment	
Tendered	**5**
	Select **Save** action button

Cashiering Interaction	
Let's print the documents and then close the PDFs.	
	Select **Quick Print** header button
Cashiering Receipt	Select **Print** header button
	Close **Cashiering** IE browser tab
Registration	Select **Print** header button
	Close **Registration** IE browser tab
Mail Activity	Select **X** icon
And now we can select the **OK** action button to return to the **Vehicle Ownership Account** springboard.	
	Select **OK** action button

Vehicle Ownership Account	
Notice that the **Expires** date has not changed. In the **Account Registration History** on the **Registration** sub-tab, the active registration is a **Duplicate Registration** valid from today until the registration's expiration date. You'll have a chance to do one of these on your own tomorrow if time allows.	
Navigation Panel	Select **Close All Managers** icon

Plate Replacement

The Scenario:
Kori Marcos needs to get his plate replaced since it's one of those super-duper faded plates where you've not even sure if it's a New Mexico plate or some other state with a basic white license plate.

Plate Replacement	
Remember: to access a record that is already in Tapestry we will need to use the Search manager.	
New Manager springboard	Select **Search** manager
Kory's current **Plate Number** is TLR802 Let's search for the vehicle with that plate number.	
Search field	**TLR802**
We're doing another activity associated with the registration, so let's select the **Vehicle Ownership** hyperlink to navigate to that account springboard.	
	Select **Vehicle Ownership** hyperlink

Vehicle Ownership Account	
Here we can see that the Registration is still active and not set to expire until this time next year. Kori currently has a **Turquoise Centennial Plate**.	
	Select **Issuance Transaction** action button
This time, we'll select the the **Plate Replacement Request** hyperlink.	
	Select **Plate Replacement Request** hyperlink

Plate/Vehicle Info	
We need to enter information about the **Plate Number** and then tell Tapestry if there will be **Contact Info** to update. The first required field in this sub-section asks if the owner would like to **Keep Current Plate Number?** In this case, Kori doesn't want to keep the current plate number so we're going to answer **No.**	
Do you want a reprint of current plate and number?	**No**
After selecting **No**, Tapestry displays a few more fields to get more information about the new plate to be issued. First, Tapestry gives us the option to **Use Existing Plate**. This might be applicable if the owner has another license plate and wants to assign it to this vehicle. If the plate is already assigned to another car, making this selection will remove it from that vehicle and cancel *that* registration.	

Plate/Vehicle Info (cont.)	
In this case, Kori does not have an existing plate to use so we'll leave the answer as **No** from the drop-down. The next field relates to **Plate Type**. It pre-populates to **Turquoise Centennial Plate** because that is the current **Plate Type** Kori has on her vehicle. He can keep this plate type or change it in this type of activity. In this case, Kori would like to switch to a **Spay-Neuter** plate type. So let's select that from the drop-down.	
Plate Type	**Turquoise Plate**
Notice that the **Registration Term** and **Expire Date** are not editable fields. This is only a **Plate Replacement** so Kori will not be able to change those aspects of her registration. If she'd like to renew her plate early in order to extend the expiration date, recall that we have the option to get a new **Plate Type** within the Registration Renewal activity. Finally, as we've seen in all activities so far, Tapestry gives us the opportunity to **Update Contact Info**. Kori has no new contact information to provide or change so we will select **No** from that drop-down.	
Update Contact Info	**No**
With all fields satisfied in this first sub-section, we can select the **Next** action button to proceed.	
	Select **Next** action button

Plate Information	
The **Plate Information** sub-section displays an image of the **Plate Type** selected in the previous sub-section including the next number in your inventory. Let's practice using the action buttons at the bottom and pretend that the plate isn't in our inventory. It's missing, so let's select that action button.	
	Select **Missing** action button
As we've seen before, Tapestry updates the image to the next **Plate Number** in our inventory. We confirm that we have this plate in our inventory and select the **Next** action button to continue.	
	Select **Next** action button

Fees	
We are already in the **Fees** sub-section. That's how quick this transaction can be. We verify that Kori has the $17 to pay for the transaction and then select the **Next** action button to proceed to the final section.	
	Select **Next** action button

Summary
Here we see a summary of the activity. After verifying everything is correct, we'll select the **Submit** action button to finish the activity and navigate back to the **Vehicle Ownership Account** springboard.

	Select **Submit** action button

Vehicle Ownership Account	
Let's **Accept a Payment** to complete the transaction with a **Cash** payment of $20.	
	Select **Accept a Payment** action button
Individual Payment Type	**Cash**

Cashiering Payment	
Tendered	**20**
	Select **Save** action button

Cashiering Interaction	
Let's print the documents and then close the PDFs.	
	Select **Quick Print** header button
Registration	Select **Print** header button
	Close **Registration** IE browser tab
Cashiering Receipt	Select **Print** header button
	Close **Cashiering** IE browser tab
And now we can select the **OK** action button to return to the **Vehicle Ownership Account** springboard.	
	Select **OK** action button

Vehicle Ownership Account	
Notice that the **Expires** date has not changed. However, in the **Account Registration History** on the **Registration** sub-tab, the active registration is a **Plt Replace,** valid from today until the registration's expiration date. We can select the **Close Manager** icon in the **Navigation Panel** for this **Vehicle Ownership Account** to return directly to the **Search** manager.	
Navigation Panel – Vehicle Ownership TLR802	Select **Close Manager** icon

The Scenario:
Tim Varian needs to get his plate replaced because his original license plate was stolen. Even though he didn't have a prestige plate, he really liked his plate number and would like to get a new plate with the same number.

Plate Replacement (Same Plate Number)	
Search manager	
Tim's **Plate Number** was 505TLR. Let's search for the vehicle with that plate number.	
Search field	**505TLR**
	Select **Vehicle Ownership** hyperlink

Vehicle Ownership Account	
Here we can see that the Registration is still active and not set to expire until this time next year. Tim currently has a **Standard Yellow Plate**. Let's select the **Issuance Transaction** action button to begin a **Plate Replacement Request** for Tim.	
	Select **Issuance Transaction** action button
Select the **Plate Replacement Request** hyperlink.	
	Select **Plate Replacement Request** hyperlink

Plate/Vehicle Info	
As we said before, Tim wants to keep his plate number that was stolen. So, we'll select **Yes** from the **Keep Current Plate Number?** drop-down.	
Do you want a reprint of current plate and number?	**Yes**
This time, Tapestry does not display additional fields to select an existing plate or new plate type. By marking this field as **Yes,** Tapestry knows that Tim wants another **Standard Yellow Plate** with the number 505TLR. Tim also has no contact information to update so we can select **No** from the drop-down.	
Update Contact Info	**No**
With all fields satisfied in this first sub-section, we can select the **Next** action button to proceed.	
	Select **Next** action button

Plate Information	
This is the first time the **Plate Information** sub-section has not opened with an image of the plate. This is because Tapestry isn't assigning a plate from our inventory but looking to assign the existing plate to the owner. We see the following instructions: **Please verify that the below name and address match the current customers name and address. Using this existing plate on the current title and registration will cancel the current registration that the plate is on.** In other words, make sure that you're using an existing plate associated with the correct owner! If the Owner and their Address match, confirm this in the **Information above matches customer's information?** drop-down menu. If you answer **No** Tapestry will generate a hard error, insisting that the information does match.	
Information above matches customer's information?	**Yes**
Now we can select the **Next** action button to continue.	
	Select **Next** action button

Fees	
We are already in the **Fees** sub-section. That's how quick this transaction can be. We verify that Tim has the $5 to pay for the transaction and then select the **Next** action button to proceed to the final section.	
	Select **Next** action button

Summary	
Here we see a summary of the activity. After verifying everything is correct, we'll select the **Submit** action button to finish the activity and navigate back to the **Vehicle Ownership Account** springboard.	
	Select **Submit** action button

Vehicle Ownership Account	
Let's **Accept a Payment** to complete the transaction with a **Cash** payment of $17	
	Select **Accept a Payment** action button
Individual Payment Type	**Cash**

Cashiering Payment	
Tendered	**5**
	Select **Save** action button

Cashiering Interaction	
Let's print the documents and then close the PDFs.	
	Select **Quick Print** header button
Cashiering Receipt	Select **Print** header button
	Close **Cashiering** IE browser tab
Mail Print close	Select **X** icon
And now we can select the **OK** action button to return to the **Vehicle Ownership Account** springboard.	
	Select **OK** action button

Vehicle Ownership Account	
Notice that the **Expires** date has not changed. However, in the **Account Registration History** on the **Registration** sub-tab, the active registration is a **Plt Replace,** valid from today until the registration's expiration date.	
Navigation Panel	Select **Close All Managers** icon

Alex Harbor has come to your office today because her registration has been suspended due to insurance that is out of date. She has documentation with her today to prove she now has current insurance. We are going to have to access her Vehicle Ownership Account to reinstate this registration.

Proof of Insurance	
New Manager springboard	Select **Search** manager
Search field	**TLR803**
We must access the Vehicle Ownership Account hyperlink because all registration related activities can be found on the Vehicle Ownership Account springboard.	
	Select **Vehicle Ownership** hyperlink

Vehicle Account Activity springboard	
Here we can see the Title status is active. Registration and Insurance both show as suspended. In the instance you are unsure of why the Registration has been suspended, select the **Registration Status** hyperlink.	
Registration Status	Select **Registration** hyperlink
We see here that the vehicle is currently not insured. Let's close this window.	
Standing Detail window	Select **Close** icon
This account also has a debt of $30 because of this suspension. The Indicator Banner at the top of the springboard says that we cannot pay for reinstatement until we first prove this vehicle has valid insurance. To do this, select the Issuance Transaction action button.	
	Select **Issuance Transaction** action button
	Select **Proof of Insurance/Affidavit of Non-Use** hyperlink.

Insurance Information	
Since the registration is currently suspended because of poor insurance, Tapestry knows that Insurance Information is needed. Once the registration has been suspended, an **Affidavit of Non-use cannot be filled out to get rid of the $30 debt.** They must prove they have up-to-date insurance. The Insurance Information fields will act with the same rules as you have seen throughout this course.	
Company name	**Metlife**
Policy number	**4431386780**
State	**NV**
Like in the Title and Registration process, if we enter a state that does not meet the liability requirements of New Mexico, Tapestry will throw a soft error. Let's change this back to NM.	
State	**NM**

Insurance Information (cont.)	
Effective date	**08/01/17**
Expiration date	**2/1/18**
Scanning Required! Click to Scan	Scan **Insurance** documents
Once all of the insurance information has been entered and scanned select the **Save** action button.	
	Select **Save** action button

Vehicle Ownership Account	
Once we save our Proof of Insurance activity a few items are updated on the account. First, if we look at the Open Tasks section, Tapestry has created a Proof of Insurance work item. This work item has been sent to the Insurance Bureau for verification. A note has been added to the Account as well giving instructions to the Insurance Bureau on what to complete for this Work Item. Secondly, the Insurance status is now active because proof was provided. However, the registration is still suspended. This is because the customer must now pay for the $30 suspension fee. **Ask the Class:** How can we pay for this debt?	
	Select **Accept a Payment** action button
	Select **Cash** hyperlink

Cashiering Payment springboard	
Tendered	**30**
	Select **Save** action button

Cashiering Interaction springboard	
	Select **Quick Print** header button
	Close **IE** tabs for PDF’s
	Select **OK** action button

Vehicle Ownership Account	
Back on the Vehicle Ownership Account we see a few things have changed once we took payment: First, our indicator banner is now hidden and balance has returned to **Zero** because the suspension fee has now been paid for. Secondly, the Registration is now Active. It will remain that way unless the Insurance Bureau denies the work item.	
Navigation Panel	Select **Close Manager** icon

Affidavit of Non-Use	
A customer may submit a Non-Use affidavit if they are not going to use the vehicle. That is the case today for Lionel Williams. His insurance is about to be out-of-date but his vehicle is currently broken down and it may take a while for him to get it fix. To ensure that his registration will not be suspended, and he will not have to pay the $30, has come to your office with an Affidavit of Non-Use.	
Search field	**506TLR**
Ask the Class: Where can we access this transaction?	
	Select **Vehicle Ownership** hyperlink

Vehicle Account Activity springboard	
We see the registration is currently active. Let's complete the Affidavit of Non-Use:	
	Select **Issuance Transaction** action button
	Select **Proof of Insurance/Affidavit of Non-Use** hyperlink.

Activity springboard	
If you recall, when insurance is already suspended, Tapestry will default this radio button selection to Proof of Insurance. However, when insurance and the registration is active, you will have the opportunity to tell Tapestry if the Customer is providing Insurance or the Affidavit of Non-Use.	
Accepted Forms	Select **Affidavit of Non-Use** radio button
Based on your select, Tapestry will populate the fields you must fill out.	
Affidavit of Non-Use Collected?	**Yes**
Non-Use Date From	**September 1 2017**
Tapestry will not allow you to enter a date later than one year from the "From" date. So if we enter….	
Non-Use Date To	**November 1 2018**
...Tapestry will throw a hard error because Non-Use can only be used for a year.	
Non-Use Date To	**September 1 2018**
Scanning Required! Click to Scan	Scan **Affidavit of Non-Use**
	Select **Save** action button
The task is now complete and the registration will not be suspended.	
Navigation Panel	Select **Close Manager** icon

Emissions Information	
The customer Marc Dixon has been suspended because his Emissions is out of date. He has come in today with proof that his emissions are now compliant with Bernalillo County's requirements. Let's access his Vehicle Ownership Account for his 2004 Infiniti G35.	
Search field	**503TLR**
	Select **Vehicle Ownership** hyperlink

Vehicle Ownership Account	
This springboard looks similar to the vehicle we saw earlier with suspended insurance: We see that a $30 suspension fee exists with an Indicator Banner saying we cannot pay this fee until proof of emissions is provided. The Registration status is suspended because of the old emissions. However, the Insurance is active. **Ask the Class:** What will we select to access the Submit Emissions activity?	
	Select **Issuance Transaction** action button
	Select **Submit Emissions Information** hyperlink

Activity springboard	
You will notice that this activity looks exactly like the Emissions sub-section in the Title and Registration activity. **Ask the Class:** Therefore, what must we select to make the fields here editable?	
	Select **Input Emissions Manually** checkbox
Let's Pass the Emissions for 1 Year.	
	Select **Pass** selector button
	Select **1 year** selector button
	9/1/2017
Tapestry will calculate the expiration date for you. To save this submission, select the **Save** action button.	
	Select **Save** action button

Vehicle Ownership Account	
We are now back on the Vehicle Ownership Account. However, we are still suspended because we now must accept payment for this $30 debt.	
	Select **Accept a Payment** action button
	Select **Cash** hyperlink
Tendered	**30**

Vehicle Ownership Account (cont.)	
	Select **Save** action button
	Select **Quick Print** header button
	Select **Print** header button
	Close **IE** tabs for PDF's
Mail Print	Close **X** mail print
	Select **OK** action button
Now that we have submitted Emissions Information and taken payment for the $30 dollar debt, the Registration is now Active and a Zero balance is on the Account.	
Navigation Panel	Select **Close All Managers** icon

Title and Registration Changes

If a customer comes in and wishes to change something about the original transaction; name change due to marriage or divorce, change of address or add a name etc., we will conduct a title change. Title Changes will assess a $5 fee in addition to any other registration fees that might be generated.

Tapestry also allows for Title Corrections which will occur when the clerk makes a mistake processing a vehicle activity. There will be no fees for these corrections unless the correction affects registration fees. Then a balance for the additional fees will be created. There will *not* be a fee for making the correction in the first place. In order for a partner to process a Title Correction, they must get in contact with their support vendor and they will initiate the correction for them. The partner can then pick up the activity and complete it.

Let' s take a look at a title change

The Scenario:
Fiona Inez is here to change the name on her title because she recently got married. She does not have a title, so she will be using a duplicate title application.

Title Change (Change Owner Name)	
New Manager springboard	
Again, we're going to do an activity to an existing vehicle registration so we'll start in the **Search** manager.	
	Select **Search** manager

Search	
We're going to search for Fiona's vehicle from her license plate number.	
Search Field	**TLR804**
Recall that the Title and/or Registration Change activity is accessible from the **Vehicle Ownership Account** springboard. So let's select the **Vehicle Ownership** hyperlink.	
	Select **Vehicle Ownership** hyperlink

Vehicle Ownership Account	
We can see from the **Owners** section that her last name is Salas. Now her last name is Inez so we'll make that change on her registration. Title and Registration Changes, like all our other activities are started by selecting the **Issuance Transaction** action button.	
	Select **Issuance Transaction** action button
The **Title and/or Registration Change** activity is one of the activities with a wrench and screwdriver beside it. Since this change is being initiated by Fiona and is not necessary because of an MVD error, it's important that we do this as a **Change** transaction so that the fee is assessed correction.	

	Select **Title and/or Registration Change** hyperlink

Information	
This **Information** sub-section is an excellent example of how **Tapestry** will often prevent you from making huge mistakes. Right at the top we see *VIN, Brands and Odometer corrections excluded*. This is because only certain departments at the central office can make such corrections or changes. Then we get a brief list of what the **Purpose** of a correction is: Intended for making changes to the current title Intended for making changes to the current registration Intended for making changes to both the current title and registration And, as we discussed a few moments ago, there is an explanation of fees to be posted: Administrative Fee ($2) Transaction Fee ($3) Any fee differences between original transaction and the change Now Tapestry wants to know what it is we want to correct. Notice that there are 5 types of information to be changed: **Vehicle Details**, **Lienholder Information and/or Owner Name**, **Owner Contact Information**, **Residential Mailing or Renewal Address**, and **Plate Information.** We can select one or all of these if more than one area needs correcting. These checkboxes are currently yellow which signifies that at least one of them must be selected to proceed. At the bottom of this list is a **STOP** sign and a hyperlink that reads Purchase Information – Use Excise Tax Activity. As it says, if the needed correction was to change the purchase price of the vehicle, thus affecting excise tax, there is a separate activity for that. We will learn more about correcting excise tax later. Finally, there is a message at the bottom explaining that certain changes will automatically generate a new title. However, it is possible to generate a new title if desired by selecting the **Generate New Title** checkbox. We're going to be changing Fiona's last name so let's select the **Lienholder Information and/or Owner(s) Name(s)** checkbox	
Lienholder Information and/or Owner(s) Name(s)	Select checkbox
The **Duplicate Title Application Needed and Collected?** checkbox displays because this change will generate a new title. If we want to print the new title, we need a **Duplicate Title** application. Fiona would like a new title so we'll select this checkbox.	
Duplicate Title Application Needed and Collected?	Select checkbox
Now we can select the **Next** action button to proceed with the change.	
	Select **Next** action button

Add a Lien Holder	
Since we marked the need to change **Lienholder Information and/or Owner(s) Name(s)**, Tapestry has now opened the sub-section for adding lienholders. There are no lienholders to add so we'll select the **No** action button.	
	Select **No** action button

Owner Information	
Since we need to change Fiona's name, and the name fields are uneditable, we're going to utilize the **Override Name** hyperlink. Note that changing her name on the title and registration will have no impact on her credential. She'll need to complete that change in a separate, driver transaction.	
	Select **Override Name** hyperlink
Changing a name requires an override and a note.	
Password	Active Directory **password**
Note	**Married and changed name**
Now we can select the **Ok** action button	
	Select **Ok** action button
The name fields are now editable, so we'll select the **Last Name** field and change it to **Inez.**	
Last Name	**Inez**
Once we change the name, our Title Assignment updates to Inez. Having changed the name, we can select the **Next** action button.	
	Select **Next** action button

Fees	
The change we made did not affect the registration fees or excise tax so the only fee is the standard $5. As long as Fiona can pay this fee, we'll select the **Next** action button to continue to the **Summary** section.	
	Select **Next** action button

Summary	
Again, we see a summary of the vehicle details and ownership for this customer and account. We can now select the **Submit** action button to complete the activity.	
	Select **Submit** action button

Vehicle Ownership Account	
Let's look at a few key changes on this springboard. First, the title now has a **Cancelled** status. This is because a new title will be printed upon taking a payment. Secondly, there is a new **Title Number** in the **Account Attributes** section. Let's take a payment to eliminate the balance and restore the Title Status.	
	Select **Accept a Payment** action button
Individual Payment Type	**Cash** hyperlink

Cashiering Payment	
	Select **Save** action button

Cashiering Interaction	
Let's print the documents and then select the **Ok** action button to return to the **Vehicle Ownership Account** springboard.	
	Select **Quick Print** header button
If we look at the **Registration** and **Title** documents you'll see that they've both been updated to reflect the new last name.	
Mail Print	Select **Print** header button
	Close **IE** browser tabs
	Select **OK** action button

Vehicle Ownership Account	
The **Title** status is active again and the **Balance** is $0. The active registration is now a corrected registration. One thing that has not changed is the name of Fiona in the **Owners** section. Again, this is because we did not change her name as a driver.	
Navigation Panel	Select **Close All Managers** icon

Excise Tax Correction

How to Correct Excise Tax	
As we have seen, excise tax for a newly purchased vehicle is calculated by Tapestry based on the purchase price of the vehicle. There are several parameters taken into consideration when calculating this tax, which we won't delve into now. However, as you all know and as you all have probably experienced, mistakes can be made when data is entered. You may have entered the wrong purchase price or the wrong NADA value for the vehicle. Tapestry includes a way for you to correct any mistakes in excise tax. Let's take a look at how we can do that now. Excise tax corrections take place from the **Vehicle Ownership Account** springboard (remember, green context bar directly relates to monetary transactions!), so I need to find the vehicle first and navigate to its **Vehicle Ownership Account** springboard.	
	Select **Search** manager

Search manager	
Let's search by the last 8 characters of the VIN:	
Search field	**GS578811**
Two Results: **2016 Cadillac SRX** and **Link** to the Primary Owner, Amber Powers. What hyperlink must we select to Navigate to the Vehicle Ownership Account springboard?	
	Select **Vehicle Ownership** hyperlink

Vehicle Ownership Account springboard	
Here on the **Vehicle Ownership Account** springboard, I can see that the vehicle was titled and registered June 21 of this year. The customer came back in today because she was notified by MVD that her excise tax was calculated improperly and she must pay the difference. To access this transaction we will utilize the Issuance Transaction action button.	
	Select **Issuance Transaction** action button
Excise Tax Correction is the very first option on this launchpad.	
	Select **Excise Tax Correction** hyperlink

Excise Tax Correction

By now, you should be used to seeing **Activity** springboards. We see the first sub-section relates to Excise Tax Correction.

We see the Information icon giving us insight that the activity is **intended for making changes or corrections to purchase information** and that **any excise tax differences between the charged tax** will be made to the balance on the Account. As you recall, the balance was 0.00 at the beginning of this activity.

Currently, the only required fields I see here is the **New Purchase Price** field and the **Accessories** field. I can see that the gray **Purchase Price** field is populated with a value of 45,100. The customer actually paid $54,100 for this vehicle and the data was improperly entered by a previous clerk. Due to this error, $1353 was charged in excise tax.

You'll notice a soft error for review. This error will disappear once a **New Purchase Price** is entered.

New Purchase Price	**54100**

After tabbing off, the **New Purchase Price** field turns green, and we can continue with our transaction. You can also see that the **New Excise Tax** field populates to show the correct amount of excise tax, in this case $1623.

Tapestry also pulled in the Rebate information as entered previously. This information can be updated here as well. It only populates because of the Purchase Type selected during the original Titling process.

We must also enter an amount into the **Accessories** field, which was $0 in this case.

Accessories	**0**

We also need to add the trade-in value from the previous transaction.

	Select **Add Sale/Trade In** hyperlink
VIN	**1G6DJ5E35C0142933**

Next we must enter the Trade-in amount. Before we do so, notice the **New Excise Tax** field

	Hover over **New Excise Tax** field

We are currently prepared to charge $1623 in taxes. Let's see how this updates after our trade-in amount is added.

Sale/Trade Amount	**15,000**

When we tab off this field, our New Excise Tax is updated and the new calculation is $1173 in excise tax.

Once all information is correct, we will continue via the **Next** action button.

	Select **Next** action button

NSF Mail Options

In this subsection, I can choose whether to send out a letter informing the customer of the excise tax correction, or I can choose to not print the letter. In my case, the owner of the vehicle is here in the office with me, and wants to take care of the remaining balance in person. Because of this, I don't need to print a letter.

	Select **Don't Print Letter** checkbox
	Select **Next** action button

Fee Information	
Like you've seen in other activities, the **Fee Information** subsection lists any relevant fees/credits for our specific transaction. In this example, I can see that there is a **Change Transaction Credit** line for $858.00. This is because my customer already paid $1353.00 earlier when he first titled and registered his vehicle. There is also a **Vehicle Excise Tax** line that lists the full $1,173.00 the customer should have originally paid in excise tax. The **Total** shows $180.00 since the customer already paid $1353 and is only responsible for the remaining balance. A refund is automatically processed because it is more than $25.01. Had it been less than $25 we would have had to Request a Refund for the customer.	
	Select **Next** action button

Excise Tax Correction	
This section is a quasi-Summary section, and I can see a quick summary of what I've done during the transaction to make sure everything looks right. This is still a point of no return, and after I select the **Submit** action button, the debt will be added to the account. Everything looks good and I'm ready to submit.	
	Select **Submit** action button

Vehicle Ownership Account springboard	
Now that I'm back in the **Vehicle Ownership Account** springboard, I can see that there is a new balance, listed here in green, of $180.00. If the customer were to be charged more excise tax, the text would be red. So we're going to do something a little bit different, we're going to select our **CRM** tab.	
	Select **CRM** tab
	Select **Letters** sub-tab
Print from the **Letter** hyperlink	Select **L0067633152** hyperlink
Print	**Receipt**

Mail Print	
	Select **Quick Print** action button
	Close additional **IE** tabs
	Select **OK** action button

Ownership Account springboard	
Let's close this group of springboards in the Navigation Panel.	
Navigation Panel	Select **Close Group** icon

Vessel Registration and Title Transfer	
In Tapestry, you must also know how to Title and Register Vessels. You will notice that the transaction for Vessels will look very similar to Vehicles.	
New Manager springboard	Select **Vehicle Management** manager
We want to Title and Register this vessel by selecting the **Register (and Title) a Vessel** hyperlink.	
	Select **Register (and Title) a Vessel** hyperlink
Like vehicles, we will enter the HIN twice for vessels new to Tapestry.	
HIN	**SKE32765H813**
Re-Enter HIN	**SKE32765H813**
The first question Tapestry will ask once the HIN has been verified is if the Vessel is 10 feet or longer. This is because if it is over ten feet it must be titled. In our case, the vessel is 18 feet.	
Is the Vessel 10 feet or longer?	**Yes**
We are transferring this title from another state.	
Transaction Type	**Title Transfer**
Because this is a Title Transfer Tapestry will ask if the vessel has ever been registered Out of State. This is because some states do not title vessels, they just register them. In this instance the Vessel is coming from Colorado, a registration only state.	
Has Vessel Ever Been Registered OOS?	**Yes**
Most Recent State Registered	**Colorado**
Since the owner only has a registration and no title, he will have to fill out an Affidavit Certifying Ownership of the vehicle at the office. Today he has his ACO….	
Document Acquired	**Affidavit Certifying Ownership**
Previous Registration Number	**AE12345CO**
Once all fields have been satisfied, we will continue.	
	Select **Next** action button

Vessel Details	
Unlike vehicles, there is no national database for HINs to pull vessel details from and we need to enter all the information for vessels new to the state of New Mexico.	
Make	**SKEETER**
Model	**TZX**
Year	**2013**
It is best practice to enter all information available. Although it is not required, if we enter the Engine ID Number…..	
Engine ID Number	**V11541739**
….horsepower becomes mandatory	
Horsepower	**115**
Color 1	**WHITE**
Color 2	**GREEN**
Tapestry now requires we enter the dimensions of the vehicle. The length is used to generate the registration fees and the length and width together calculate the Passenger Capacity. Notice how these fields update as we add dimension information.	
Overall Length – **feet**	**18**
Inches defaults to zero.	

Vessel Details continued	
Beam (width) – **feet**	**6**
After entering the Beam width, Tapestry calculates the capacity as 7 passengers and 1,080 pounds. Should the Document provided state a different capacity, the override capacity checkbox can be selected, making these fields editable. Transom, which is the depth, is optional. We will enter 2 feet.	
Transom (depth) – **feet**	**2**
The next few fields are used to collect information used by Game and Fish and law enforcement. This information will populate on the registration printed. This vessel will be used for Pleasure	
Type of Use	**Pleasure**
The Type of Vessel is asking if it is an open or closed cabin. This cabin is open.	
Type of Vessel	**Open**
Next we need to enter how the vessel is propelled. If you cannot find your propulsion type here you can select other. In that instance, Tapestry will populate another field to enter that information. In our case, outboard is on the list.	
Propulsion	**Outboard**
Our hull material is not listed so we'll select *Other* and enter the material of **Composite**.	
Hull Material	**Other**
Other	**Composite**
Fuel Type	**Gasoline**
Like with vehicles, Tapestry needs to know information about the Owners for the vehicles to populate the appropriate sub-sections as you go through this transaction. The Vessel has individual primary owners and a lien holder as well.	
Primary Owner Type	**Individual**
State of Primary Operation	**NM**
Is this vessel leased?	**No**
Is there a lienholder?	**Yes**
Like vehicles, vessels can be titled only as well if the owner does not plan to operate it here in NM. When all fields are complete, select the **Next** action button to continue.	
	Select **Next** action button

Lien Holder Information	
Since we told Tapestry a lien holder exists, the Lien Holders sub-section has opened for us. This sub-section acts exactly as it does for vehicles.	
Lien Holder Name	**DURANGO CREDIT UNION**
Date Filed	**Today's Date**
Maturity Date	**073125**
Remember: Lien holder addresses can be out of state. Our out of state vessel has an out of state lien holder.	
Lien Holder Address	**15 BODO DR 81303**
	Select **Next** action button
Again, we can add as many lien holders as necessary.	
Do you want to add another lien holder?	Select **No** action button

Owner Information	
We are now prompted to enter Owner Information for an Individual because of our selection in the Vessel Details sub-section. The owner of this vessel does not hold New Mexico license, but we can still enter the information from his out-of-state licenses. First we need to enter the owner's **Proof of Identity**.	
Proof of Identity	**Driver's License**
It's important to change the **Credential State** if it is not from New Mexico. In this case, the owner's license is from Colorado.	
Credential State	**CO - Colorado**
Now we can enter the owner's **Credential Number**.	
Credential Number	**9873469548**
Next we need to select the **Search for Owner** action button so that Tapestry can determine if this individual is already in our system.	
	Select **Search for Owner** action button
Since none of the fields populate with information, we know this person does not exist in Tapestry. We will need to enter their information manually. Starting with the **First Name**. . .	
First Name	**Daniel**
Middle Name	**Alfred**
Last Name	**Raymonds**
Date of Birth	**11-14-1951**
Since it is a best business practice to gather as much information as the customer is willing to provide, we will also enter an **E-mail Address** and **Telephone Number**.	
Email Address	**Rayman@email.com**
Phone Type	**Cell**
Telephone Number	**904-384-1978**
When all fields are complete, select the **Next** action button to continue.	
	Select **Next** action button

Owner Address	
Since Daniel did not previously exist in Tapestry, there is no address to pull in. So we'll need to enter it manually as well.	
Single Line	**12412 Grand Avenue NE 87123**
Is Owner's Mailing Address same as physical address?	**Yes**
Is Owner's Renewal Address same as Mailing Address?	**Yes**
When all addresses have been entered and verified, select the **Next** action button to continue.	
	Select **Next** action button

Purchase Information	
The first sub-section within the Required Documents section is Purchase Information. Daniel did have the vessel registered to his name in Colorado. Therefore, he should not be charged excise tax. To view what purchase type we should select in this instance, use the Additional Information icon on the Purchase Type drop-down.	
Purchase Type	Select **Additional Information** icon
Here we see all of the purchase types and what they can be used for. We need to select the **None** Purchase Type because this is a Same owner out of state transfer. We can make our selection from this window by selecting the **None** hyperlink.	
Purchase Type window	Select **None** hyperlink
The date acquired field will not affect fees for late title transfers. For now, let's enter today's date.	
Date Acquired	**Today's Date**
	Select **Next** action button

Documents	
First, flip through the documents collected and make sure they are all marked as collected in Tapestry. Let's mark our HIN Inspection and enter that information.	
HIN Inspection	Select **Collected** checkbox
Inspection Type	**Law Enforcement**
In-State VIN Inspector?	**Yes**
Date of Inspection	**06/27/18**
Scanning Required! Click to Scan	**Scan documents**
	Select **Next** action button

Registration and Fees	
All the fees look good and we have confirmed with the Raymonds that they have money to pay the debt. Remember: this is your last sub-section to save this transaction and come back to it later.	
	Send Vehicle Verification
Fees sub-section	Select **Next** action button
Summary section	Select **Submit** action button

Vessel Customer springboard	
Like we saw for vehicles, the Account ID will not become the Vessel Registration Number until you except a payment. In order to accept a payment, we'll need to navigate to the **Vessel Ownership** springboard.	
Vehicle Customer springboard	Select **Account ID** hyperlink

Vessel Ownership springboard	
From this springboard we can select the **Accept a Payment** action button.	
	Select **Accept a Payment** action button
	Select **Cash** hyperlink

Cashiering Payment	
Tendered	$50
	Select **Save** action button

Cashiering Interation	
Cashiering Interaction	Select **Quick Print** header button
Cashiering Receipt Vessel Title Application Form Vessel Temporary Registration	Select **Print** header button
	Close **IE** tabs containing letters
Vessel Title	Select **Print** header button
	Close **IE** tabs containing letters
Mail	Close **X** icon
Scn Title App	Scan Title app
	Select **OK** action button

Account springboard	
We see the Boat Registration Number is now assigned and the appropriate expiration date is added. We see the Vessel Ownership springboard looks very similar to the Vehicle Ownership springboard. Let's close the springboards for this vessel to move to our next exercise.	
Navigation Panel	Select **Close Group** icon

Vessel Registration Only	
For our next transaction Vernon Douglas has a Jet Ski he purchased and would like to register it in New Mexico.	
Vehicle Management springboard	Select **Register (and Title) a Vessel** hyperlink

Vessel Information	
Let's start by entering and re-entering the HIN. Like vehicles, if a vessel does not have a HIN Tapestry will generate one when the No Hull Number checkbox is selected.	
Hull Number	**ZDB31899E314**
Re-Enter Hull Number	**ZDB31899E314**
In our case the vessel is not 10 feet or longer….	
Is the Vessel 10 ft or longer?	**No**
First Time NM Restration?	**Yes**
Vernon purchased the Vessel at a Dealership in Nebraska and has the vessel's old registration and title.	
Most Recent State Registered	**Nebraska**
Previous Registration Number	**RT12345NE**
Document Acquired	**Certificate of Title**
	Select **Next** action button

Vessel Details	
We must enter this information on the vessels manually.	
Make	**Zodiac Boats**
Model	**Bayrunner 310**
Year	**2014**
Color1	**White**
Tapestry knows that if we wish to proceed with a Vessel Registration Only the vessel must be less than 10 feet.	
Overall Length - **feet**	**10**
Tapestry returns a hard error "Must title all boats 10 feet or longer" if we enter a vessel 10 feet or longer. Let's fix the hard error by entering 9 feet, 11 inches.	
Overall Length – **feet**	**9**
Overall length – **inches**	**11**
Beam – **feet**	**4**
AS we saw before, the capacity is calculated based on the length and width. Transom depth is not required and is not used for calculating capacity.	
Type of Use	**Pleasure**
Type of Vessel	**Open**

Vessel Details (cont)	
Propulsion	**Outboard**
Hull Other	**Rubber**
Fuel Type	**Gasoline**
Primary Owner Type	**Individual**
State of Primary Operation	**New Mexico**
Tapestry reminds us that this is a Registration Only and no title will be generated.	
	Select **Next** action button

Owner Information	
The owner of this vessel does not a hold New Mexico license. Instead, he presents us with a Passport Card as his **Proof of Identity**.	
Proof of Identity	**US Passport Card**
Instead of a credential, we'll be entering in the customer's Social Security Number into the **SSN** field.	
SSN	**444-19-4874**
We need to select the **Search for Owner** action button so that Tapestry can determine if this individual is already in our system.	
	Select **Search for Owner** action button
Tapestry has not pulled in Vernon's information. We are going to add him in.	
First Name Middle Name Last Name	Vernon Dempsey Douglas
Date of Birth	01/23/1945
	Select **Next** action button

Owner Address	
We will need to enter in the owner address	
Physical Address	**406 Main St Truth or Consequences**
Is Owner's Mailing Address same as physical address?	**Yes**
Let's add a renewal address as well, for Vernon would like the Renewal at a separate PO Box.	
Owner has same Renewal Address?	**No**
This time we will enter another Truth or Consequences address but just use the zip code.	
Renewal Address	**PO Box 752 87901**
	Select **Next** action button

Purchase Information	
The vessel was purchased at a dealer in Nebraska for $3,590.	
Purchase Type	**Out of State Dealer**
Purchase Date	**June 5 2018**
Purchase Price	**3,590**
	Select **Next** action button

Documents	
Scanning Required Click to Scan	Scan Documents
HIN Inspection	Select **Collected** checkbox
Inspection Type	**Civilian**
In-State Inspection?	**No**
Date of Inspection	**June 10 2018**
	Select **Next** action button

Registration and Fees
We can see Tapestry will assess Registration fees for the vessel. However, no Excise Tax was charged because this is a Registration Only transaction.

	Send Vehicle Verification
Fees sub-section	Select **Next** action button
Summary section	Select **Submit** action button

Vessel Customer springboard	
In order to accept a payment, we'll need to navigate to the **Vessel Ownership** springboard.	
Vehicle Customer springboard	Select **Account ID** hyperlink

Vessel Ownership springboard	
From this springboard we can select the **Accept a Payment** action button.	
	Select **Accept a Payment** action button
	Select **Cash** hyperlink

Cashiering Payment	
Tendered	**$30.50**
	Select **Save** action button

Cashiering Interaction	
	Select **Quick Print** action button
Mail Print	Select **Print** header button
	Close **IE** tabs containing letters
Mail Print	Close **X** icon
	Select **OK** action button

Vessel Ownership springboard	
On the Vessel Ownership springboard we see a Vessel Registration Number added. However, if we look at the Titles tab the counter is zero because we did a Title Only.	
Navigation Panel	Select **Close All Managers** icon

Voids

Earlier today you completed a transaction for Marc Dixon. He paid a reinstatement fee. However, Mark has since decided he doesn't want to pay the fee. Therefore, we need to void the payment. Partners, contact your partner support vendor to reverse/void the transaction.

Voiding a Payment	
New Manger springboard	Select **Cashiering** manager
The Drawer ID is the unique identification number given to a specific cash drawer. To view information on the drawer, select this ID.	
	Select **Drawer ID** hyperlink
The All tab takes us to a list of payments associated with this cash drawer and this clerk. We want to access the payment taken for the customer Marc Dixon. Find this payment and select the Payment ID to access the payment information.	
Marc Dixon	Select **Payment ID** hyperlink

Cashiering Payment	
This hyperlink takes us to the cash payment for customer Marc Dixon. On this springboard we can see details for the payment, the amount, the drawer it is associated with, and links to the Interaction and drawer itself. The clerk will select the Void header button to void the payment. Voiding the Payment will add the $30.00 debt back for the Vehicle Ownership Account.	
	Select **Void** header button
A manager must input their credentials in order for a void to take place. For one person offices the manager can self-approve.	
Username	**Manager Username**
Password	**Manager Password**
You will provide a note elsewhere so for now, simply select the **OK** action button.	
	Select the **OK** action button
MVD tracks voids that take place in Tapestry and requires a Reason for your Void. Today we will enter **Other**.	
Reason	**Other**
A note must be added for the void to take place. Notes can never be EDITED or DELETED and the person who added it, voided date, and voided timestamp are tracked.	
Note	**Customer changed mind.**
	Select **OK** action button
The payment has now been voided, as we see in the Cash section where the voided dates is today's date and we see on my springboard that I was the user who voided my payment. For confirmation this payment was voided, let's access the Vessel Ownership Account via the Payment Details sub-tab.	
ID Column	Select the **ID** hyperlink

Vehicle Ownership Account

We see here that the a debt exist for this account because of our voiding of the payment. As you can see we cannot reverse a reinstatement because reinstatements are on there and they do need to be collected. He just decided he was not going to pay his.	
Navigation panel	Close Group icon

Cashiering Payment	
In the Payments tab, All sub-tab notice that the payment has been voided, thus does not display in this current view. Should you wish to view voided payments here, you must select the **Show History** header button. However, in order for partner support to reverse our transaction, its always best practice to refresh all interactions. To do this, select the **Interaction** tab.	
	Select **Drawer Id** hyperlink
Another way of closing is we're going.. Whenever opening this tab it is always best practice to refresh it to see the most updated data. An interaction in Tapestry is created whenever an Activity is completed that posts an outstanding balance, or debt, onto an account. All of your interactions must be closed before you can close your drawer at the end of the day. All of the grey rows you see here are interactions that have been closed. An interaction can only be closed by either taking a payment for the debt or reversing the activity completely. We see that there is an open interaction for Marc Dixon because we voided the payment we took earlier. It should be said that once an activity is reversed it cannot be retrieved! Should the customer return you would have to complete the activity all over again.	
Interactions tab	Select **Interaction Id** hyperlink
Payment Direction.	
Did the customer pay more than what was owned?	Yes
Press "ok" to complete this interaction with a reason of "Customer Overpaid".	Select the **Ok** action button
All **Interactions** are closed	**Refresh all** header button

Closing a Cash Drawer

Closing a Cash Drawer	
Properly closing a cash drawer at the end of the day is just as important as properly opening a cash drawer at the start of the day. At the end of every day, you'll need to close your drawer whether you accepted payments or didn't accept any. For our purposes today, all of our activities and examples will close cash drawers that have gone through multiple transactions in the day. Let's go ahead and take a look at how to close a cash drawer.	
	Select **Cashiering** manager

Cashiering Springboard	
Once I'm in the **Cashiering** springboard, I can see that the **Open Drawers** sub-tab is shown by default and any cash drawers I have currently open will appear here. I currently only have one drawer open, and all of the information pertinent to that specific cash drawer is listed under these columns. The **Drawer** column lists a cash drawer number. This number is unique to both the user and the specific day on which the drawer was opened. Selecting this Drawer ID will take me to a list of specific transactions I performed throughout the day with this drawer.	
	Select **Drawer ID** hyperlink

***Cashiering Drawer** springboard*	
From this springboard, I can see more specific details about my open cash drawer. In this **Cash Drawer** section at the top, I see details like when I opened my cash drawer (date and time stamp), as well as my office location. An Open Drawer icon appears to the right, as indicated by the cash image. In the **Payment Summary** section, I see a succinct summary about all the types of payments I took throughout the day and what float amount I started with. In the **Recent Notes** section, I would see any notes I have added for this specific cash drawer. In the payments section, you can see the payments we have taken in for the day. You can see the payment hyperlink, issue date, payment type, name of customer, Voids, and amount the customer paid. Let's take a look at the Interaction tab.	
	Select **Interaction** tab
Remember: whenever navigating to this tab it is always best practice to Refresh your interactions.	
	Select **Refresh All** header button
In the interaction tab, you can see each interaction you created today. Interactions are created in Tapestry when you submit and activity that creates debt on any account. This is why it is so important to make sure the customer has payment before you Submit any activity! You cannot close a drawer with open interactions. If we had an incomplete interaction, it would appear in standard black text with blue hyperlinks.	

Cashiering Drawer springboard (cont.)	
However, all interactions are complete for today so we can Close our Drawer. When we do so, notice how the open drawer icon changes.	
	Select **Close Drawer** header button
You will get a pop up that asks if you are sure you want to close the drawer. You have the option to add any notes you feel are necessary however, it is not mandatory to enter a note.	
	Select **Ok** action button
The Open Drawer icon has now changed to a Close Drawer icon and a closed date has been added to the Cash Drawer section. At this point we would reconcile and submit our drawers as normal.	
	Select **Reconcile Payments** header button
Cash	Enter **All cash in the Clerk's drawer, including the Daily Float**
	Select **Remove Today's Float** hyperlink
	Enter **Float Money $50.00**
Verify you have balanced	Select **Click here for CSR verification**
Username	Enter **your Username**
Password	Enter **your Password**
Note	Enter **Balanced**
	Select **OK** action button
	Select **Check** header button
Enter each Check	Enter **Check Number and Amount**
Once Cash, Check, Money Order, and Cashier's Check are reconciled	Select **Save** action button
	Select **Submit Drawer** action button

Cashiering Manager	
You now have no drawers opened in the Open Drawers tab in the Cashiering manager.	
	Select **Close All Managers** icon