

## 1<sup>st</sup> 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.

<b>1<sup>st</sup> Time Title and Registration w/ Lessor</b>	
<b><i>New Manager springboard</i></b>	
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 <b>Title (and Register) a Vehicle</b> hyperlink.	
You've now seen three ways to access the <b>Title (and Register) a Vehicle</b> hyperlink	
<ul style="list-style-type: none"><li>• The <b>Office Transactions</b> manager</li><li>• The <b>Vehicle Management</b> manager</li><li>• The <b>Issuance Transaction</b> action button via the <b>Search</b> manager</li></ul>	
Over time, you may find there is one method you prefer, but for the majority of our class exercises we'll be utilizing the <b>Office Transactions</b> manager. Let's select that together now.	
	Select <b>Office Transactions</b> manager

<b><i>Office Transactions</i></b>	
Again, select the <b>Title (and Register) a Vehicle</b> hyperlink	
	Select <b>Title (and Register) a Vehicle</b> hyperlink

<b>VIN</b>	
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	<b>3C4PDCGG6GT199687</b>
Re-Enter VIN	<b>3C4PDCGG6GT199687</b>
For the previous exercises, the Out-of-State Title Transfers, we selected <b>Title Transfer</b> from the <b>Transaction Type</b> drop-down menu. However since we do not have a title of any kind, we'll be selecting <b>1st Time Title</b> from the menu for this exercise	
Transaction Type	<b>1st Time Title</b>
The country auto-populates to <b>USA</b> , 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 <b>USA</b> .	
As we've seen in previous exercises, we must now tell Tapestry which <b>Required Document</b> 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	<b>Manufacturer's Cert of Origin</b>
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 <b>ALT</b> key plus that letter. For example, we see the <b>Next</b> action button has the <b>N</b> underlined. Therefore, if we select <b>ALT + N</b> simultaneously, the <b>Next</b> action button will be selected.	
Select <b>ALT + N</b> keys simultaneously	

<b>Vehicle Detail</b>	
In the <b>Vehicle Detail</b> 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	<b>Individual</b>
Color 1	<b>White</b>
Odometer Code	<b>Actual</b>
Odometer Reading	<b>578</b>
This vehicle is leased but there is no lienholder.	
Is this a leased vehicle?	<b>Yes</b>
Is there a lienholder?	<b>No</b>
This not a <b>Title Only</b> transaction or a <b>Homemade Vehicle</b> so we can leave the boxes unchecked. Now let's enter the <b>Insurance Information</b> .	
Company Name	<b>Farmer's Insurance</b>
Policy Number	<b>48782714</b>
Effective Date	<b>July 25 2017</b>
Expire Date	<b>January 25 2018</b>
With all the fields within the <b>Vehicle Detail</b> sub-section satisfied, let's continue. Let's try the Hot Key we learned in the last sub-section.	
Select <b>ALT + N</b> keys simultaneously	

<b>Ownership Information</b>	
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 <b>Owner Information</b> sub-section.	
Proof of Identity	<b>Driver License</b>
Lessor Name	<b>Medline Auto</b>
The next required field is for the leasing company's <b>CRS Id Number</b> . This field is required because satisfying this field signals Tapestry not to charge excise tax and because the <b>CRS Id Number</b> will be necessary to complete the <b>Notice of Vehicle Sold</b> activity when the vehicle is sold.	
CRS Id Number	<b>33-849847-384</b>
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	<b>020000228</b>
Select <b>Search for Owner</b> 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	<b>KLFrye@email.com</b>
Phone Type	<b>Cell</b>
Telephone Number	<b>505-781-3761</b>
<b>Title Assignment</b>	
Looking at the <b>Title Assignment</b> , 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 <b>Manual Assignment</b> hyperlink to change the <b>Title Assignment</b> .	
Select <b>Manual Assignment</b> hyperlink	
The Title Assignment fields are now editable. Let's move the Lessee's name to <b>Title Assignment Line 2</b> .	
Title Assignment Line 1	Remove <b>FRYE Kaylee</b>
Title Assignment Line 2	Add <b>FRYE Kaylee</b> before <b>LESSEE</b>
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 <b>Title Assignment</b> and satisfying any required fields, let's select the <b>Next</b> action to continue.	
Select <b>Next</b> action button	

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

<b>Purchase Information</b>	
We're about to enter <b>Purchase Information</b> , but didn't Tapestry pull in an Albuquerque address for the owner? Why aren't we entering information regarding <b>Emissions Requirements</b> ?	
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 <b>Purchase Types</b> . This time, the brand new vehicle is being leased from a New Mexico Dealer. So we'll select that from the <b>Purchase Type</b> drop-down menu. Notice how the number of available fields changes with this selection.	
Purchase Type	<b>New Mexico Dealer</b>
Tapestry still asks for the <b>Purchase Date</b> and <b>Purchase Price</b> , but there are also fields to enter <b>Rebate</b> and <b>Accessories</b> . There is a field to record a <b>Dealer Trade-In Price</b> and finally a field to enter the <b>Dealer Number</b> . There is also a new hyperlink we haven't seen before that allows us to enter information about <b>Dealer Sales</b> or <b>Trade-ins</b> .	
Unlike our previous exercises there is no field for the vehicles <b>NADA Value</b> . This is we don't run NADA on brand new vehicles with MCOs.	
First let's enter the <b>Purchase Date</b> and <b>Purchase Price</b> .	
Purchase Date	<b>09/01/2017</b>
Purchase Price	<b>\$20,995</b>
Ms. Frye did not get a rebate, but she did purchase an accessories package so we can enter that value in the <b>Accessories</b> field. Tapestry will calculate excise tax based on the <b>Purchase Price</b> plus the <b>Accessories</b> .	

<b>In Case They Ask:</b> The <b>Additional Fields</b> icon will allow you to enter you <b>Accessories</b> in the form of Transportation, Delivery, and Dealer Preparation costs.	
Accessories	\$2,790
<b>Purchase Information (cont.)</b>	
Before we enter the <b>Dealer Number</b> , we should enter the information regarding Ms. Frye's sale to the dealer. Let's select the <b>Add Sale/Trade In</b> hyperlink to add that information.	
	Select <b>Add Sale/Trade In</b> 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 <b>Sale/Trade In VIN</b> for the vehicle Ms. Frye sold to the dealership.	
Sale/Trade In VIN	JF1GPAL64CH230538
	Select <b>Sale Type</b> 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 <b>Sold to Dealer</b> from the drop-down.	
Next we need to enter the <b>Sale/Trade Amount</b> . 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: <b>Dealer Number</b> .	
All dealers will be registered within Tapestry and given a <b>Dealer Number</b> .	
Dealer Number	4100
With all fields satisfied, select the <b>Next</b> action button to continue.	
	Select <b>Next</b> action button
Tapestry generates an error: <b>Invalid New Mexico Dealer License Numbers</b> . 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 <b>OK</b> action button and correct <b>Dealer Number</b> . Then we'll be order to continue with the activity by selecting the <b>Next</b> action button.	
	Select <b>OK</b> action button
Dealer Number	4010
	Select <b>Next</b> action button

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

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

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

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

<b>Fees</b>	
We are now on the <b>Fees</b> sub-section displaying the Fee Breakdown. Here, we will verify that the owner has a form of payment before selecting the <b>Next</b> action button.	
	Select <b>Next</b> action button
Finally, we're ready to simulate <b>Send Information to Signature Pad</b> . Let's select that action button now.	
	Select <b>Send Information to Signature Pad</b> 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 <b>Next</b> action button to proceed.	

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

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

<b>Cashiering Payment</b>	
Let's enter \$125 tendered and then select the <b>Save</b> action button to process the payment.	
Tendered	<b>125</b>
	Select <b>Save</b> action button

<b>Cashiering Interaction</b>	
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 <b>Quick Print</b> header button to print our documents.	
	Select <b>Quick Print</b> header button.
Print the documents and close the PDF tabs within the browser.	
	Close Registration <b>IE tab</b>
	Close Title <b>IE tab</b>
	Close Application/Receipt <b>IE tab</b>
Since we accepted the payment from the <b>Vehicle Customer</b> springboard, Tapestry navigates back to that springboard upon selecting the <b>OK</b> action button.	
	Select <b>Ok</b> action button

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

<b>Vehicle Ownership Account springboard</b>	
We see here that the Title, Registration, and Insurance all have an active status once we take payment.	
	Highlight <b>Owners</b> 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 <b>Close Manager</b> icon

