# dTRs Dealer Portal: Editing Functionality Instructional Step-by-Step

The dTRs V2.2.2 release introduces the ability for dealers to edit various fields on the Title Application directly within Dealer Portal. This functionality reduces the need for Title Applications to be voided and resubmitted when a correction and/or change is required by permitting revisions in the portal resulting in an improved dealer experience.

dmv

Transaction Detail: NCC734664276

West Virginia

Origina

VRS

Title Details

# How it works:

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2

#### Open the Pending Title Application:

Locate the Pending Title Application and open the record. To initiate editing, select the button with three dots in the upper right-hand corner.

# Edit Button:

Select the Edit Button to begin editing the Title Application.



0

D12345

Dealer Certificatio

Dealership Name

## 3 Previous Title Card:

All fields on the Previous Title card are editable.

#### NOTE:

If the Previous Title state is West Virginia, the Previous Title Number is <u>required.</u>



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SEARCH

Title Numbe

Sections

--- 1

## **Owner Details Card:**

Select the drop-down arrow to expand the Owner Details card.

Once expanded, all fields on the Owner Details card are editable.

#### NOTES:

All fields indicated with an asterisk (\*) are required.

The Street Address field is limited to 30 characters.

Navigate out of the Postal Code field by using the Tab key or by clicking out to populate the City, Region, and County field.

The last section of the Owner Details card is dynamic based on the Customer Type. Relevant fields will display for data entry upon Customer Type selection.

Editing Transaction D	Detail: NCC734664276	UPLOAD EVIDENCE	CANCEL SAVE ····
Test DTRS-1330 Personal information Customer Type PERSON Birthday Midd yyyy Addres Striet Address 123 MAIN AVE City CHARLESTON	Full Name     Test DTRS-1330     Phone     B00 555-1234     Test Address field is     mited to 30 characters.     Tab     Co     Postal Code     West Vrginia - 25301	Email automation@test.com Phone Type Or click out of the Postal de field to populate the ity, Region, & County. CLAY US •	Sections     Previous Title     Owner Datalis     Vehicle Details     Registration     Insuance     Lans     Sale     Trace his     Endence
Identification  • License Type Driver's License	State     West Virginia      *	License Number  12345	This section of the Title Application is dynamic based on Customer Type.

UPLOAD EVIDENCE CANCEL

ect the drop-down

v to open & edit the

Owner Details card

Editi	ng Transaction Detail: NCC734664276 UPLOND EVIDENCE CANCEL ANVE ···	
9	Vehicle Details     Sections       vehicle Information     *Make     *Model     Previous Tifle       *VN1     *Make     *Model     Which Information       ET485ANC866/795289     CHEV     CAM     2021       *Vehicle Class     *Body Style     *Lust Type       Class A - Cars and Trucks     *     20     Cas	
	Make Description     Bioly Category     Primary Str. Color     Secondary Str. Color     Ade Quantity       Optional     Optional     Optional     Optional     Optional       Brands     Use     Condition       Optional     •     Personal     •       Optional     •     Personal     •	
	Odometer     • Odometer Reading     • Unit     • Reading Date       Actual     •     2006.00     M     •     06/30/2021       Measurements     • Unit     Unit     Unit       • Oosser Weight     • Ubit     Unit     •       1200.00     LBS     Optional     •	

## Vehicle Details Card:

5

All fields on the Vehicle Details card are editable.

#### NOTES:

All fields indicated with an asterisk (\*) are required.

To decode a different VIN, input the correct VIN into the associated field and navigate out by using the Tab key or clicking. The VIN will decode, and the appropriate Vehicle Details will populate on the Title Application.

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Editing Transaction Detail: NCC734664276

Owner Details

Test DTRS-1330

# Registration Card:

6

The Registration Card is <u>not editable</u> in Dealer Portal. If edits or corrections are needed, please follow the existing process. The Title Application will need to be voided and resubmitted through VRS.

Editin	Editing Transaction Detail: NCC734664276				UPLOAD EVID	DENCE CANCEL SAVE ···
6	Registration					Sections
	Registree Name	Address	Registration Period	Expiration	Temporary Tag Number	The Registration Card is
	Title 1 Automation	5056 OAK ST CLARKSBURG, Clay WV, 26301, US	One-Year Registration	05/01/2023	56883	Liens
	Plate Number	Plate Type Plate Class	Requ	ested Plate Clas:		Sale Trade-Ins Evidence
	56883	STANDARD A - Cars, Vans, Trucks Less Tha	n 10001lbs A - Ca	ars, Vans, Trucks	Less Than 10001lbs	

NAIC Numb

Count

US -

12345

Count

Select Remove Insurance to delete existing information & add new insurance details.

LORAIN

CANCEL

Section

9	Insurance	Card:
	mountee	cuiu.

All fields on the Insurance card are editable.

#### NOTES:

All fields indicated with an asterisk (\*) are required.

Existing insurance information can be deleted by selecting the Remove Insurance button and using the Add Insurance button to input new insurance details.

# 8 <u>Liens:</u>

All fields on the Liens card are editable.

# NOTES:

All fields indicated with an asterisk (\*) are required.

A label will display near the Lienholder name to indicate if the lien is paper or electronic.

To edit the existing lien information, select the drop-down arrow to expand the card.

Additional lienholders may be added by selecting the Add Lien button.

Editing Transaction Detail: NCC73466	<b>1276</b> U	JPLOAD EVIDENCE CANCEL SAVE ***	
8 Liens A labe indicati paper	I will appear Ig if the lien is or electronic.	Select the drop-down arrow to open & edit the existing Lien information.	
ADD LIEN To add a	n additional lien, select the Add Lien button.	Registration Insurance	

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Editing Transaction Detail: NCC734664276

Insurance Ager

Agent One

Effective Dat

The Street Address field is limited to 30 characters.

\* Insurance Compan

A+ INSURANCE

Street Address
 S15 N Abbe Rd
 City

Elvria

5678901234

Policy

REMOVE INS

7 Insurance

Participating ELT lienholders display in a drop-down list upon data entry into the Lienholder field. Select the appropriate lienholder from the list.



Editir	ng Transaction Detail: NCC734664276	An "Electronic" label	UPLOAD EVIDENCE CANCEL SAVE ***
	Liens	appears indicating an electronic lien.	Sections Previous Title
	Bank of America - D00011WV		Vehicle Details Registration Insurance
	Bank of America - D00011WV PO Box 2000 Charlette, OUTS NC, 27600, US		Liens Sale Trade-Ins Evidence
	Issue Date     Lien     11/05/2021     C/S	1 Type * Amount 3/C • \$ 2,750.00	These fields can be edited.
	REMOVE LIEN		

Once selected, an "electronic" label will appear. Issue date, Lien Type, and Amount can be edited.

Editing	g Transaction Detail: NCC7346642	76	UPLOAD EVIDENCE CANCEL SAVE ····
	Liens		Sections Previous Title
	US Bank PAPER		Owner Details Vehicle Details Details
	* Lienholder		Insurance Liens
	US Bank		Sale Trade-Ins
	* Issue Date	Lien Type     Amount	Evidence
	11/05/2021	C/S/C ~ \$ 2,750.00	These fields can be edited.
	* Street Address		
	1234 Main Street		
	• City County	Region     Postal Code     Country	
	Charleston Optional	West Virginia + 12345 Option	nal
	REMOVE LIEN		
	ADD LIEN		

# For Paper Liens (Non-ELT Participants):

All fields are editable.

### NOTES:

All fields indicated with an asterisk (\*) are required.

Liens can be removed using the Remove Lien button.

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#### 9

Sale: Sale Type, Transaction Date, and Purchase Price are editable.

# NOTES:

The fields on the Sale card are dynamic based on the selected Sale Type. Relevant fields will display for data entry upon Sale Type selection.

For Leases: Transaction Date, Lease Price, Down Payment, Monthly Payment, and Term are editable.

Sale	Liens Sale
Purchase         • Sale Type         Purchased From         • Transaction Date         • Purchase Price           Purchase         •         CHAMP TITLES, INC.         06/30/2021         ©         \$ 28,000.00	Sandana Tradeina Evidence
Tas Status Tas Exempt Reason Tasable –	
Sale	Sale Tradens
Lesse Company Name Company Code + Transaction Date           Lesse         -         -         06/39/2021         -	Coonse
Less Price * Down Payment * Monthly Payment * Term     S 32,000 00 \$ 5,000 00 36	
	Sale Purchase Sale CHAMP TITLES, INC. Ob/30/2021 Sale Sale Less Sale Less Sale Less Sale Less Sale Sale Sale Sale Sale Sale Sale Sale



#### Trade-Ins: 10

Title Number and Amount are editable on the Trade-Ins card.

# NOTES:

Trade-Ins can be added/removed using the appropriate button.

This card cannot be saved without a valid West Virginia trade in.

4S4BSANC665570305			^	Trade-Ins Evidence
* Title Number	Owner Name	• 1/111		
NVR8AFZ89340	John	Title Number & Amount can be	05	
Make	Model	edited.		
DODG	CAR	2017		
State	* Amount			
West Virginia	~ \$ 1,200.00			
REMOVE TRADE-IN				

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# 11 Evidence:

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Evidence can be uploaded to the Title Application using the Upload Evidence button. To view or delete evidence, select the appropriate button.

1	Evidence			UPLOAD EVIDENCE
	Date Uploaded	Document Type	Actions	
	04/19/2023	APPLICATION	VIEW DELETE	
			Rows per page: 10 v	1-1 of 1 < >

# Save Edited Title Application:

Select the Save button to save the edited Title Application in Dealer Portal.

dmv				Q, Title Number, VIN, Owner Name, Plate Number Title Number St	EARCH 🚨
12 Editing Transaction Detail: NCC734664276				UPLOAD EVIDENCE CANCEL SAVE ···	

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