



Dealer Account Portal (DAP) Guide

Dealer Admin Portal (DAP) User Guide

Welcome to SWBC's Dealer Admin Portal (DAP). We know you have many options to choose in product providers and we thank you for choosing us.

The DAP will allow you to perform contract entry, remittances, cancellations and contract quoting. The DAP also hold all historical data from day one you begin to use it.

This user guide will assist you with understanding how the portal works in each of the areas. If you have any questions, please contact DealerMgmt@SWBC.com.

Let's get started!

To access the portal

Please visit the following site and enter your user name and password www.SWBCPowerBuy.com

User Name: _____

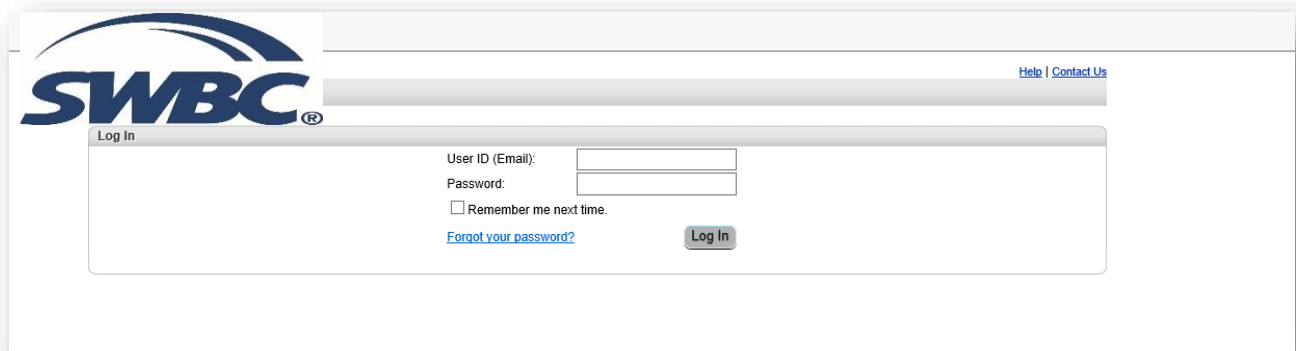
Password: _____

Note: First time users will be prompted to change the password provided by SWBC. If you forget your password, please contact SWBC Support Team at DealerMgmt@SWBC.com. A representative will reset your password for you to be able to login to the DAP.

Browser Compatibility:

Browsers supported are as follows: Firefox, Internet Explorer 7, Internet Explorer 8, Internet Explorer 9, Internet Explorer 10, Internet Explorer 11, Chrome, Safari, and Mozilla.

Login Screen



The screenshot shows the login interface for the SWBC Dealer Admin Portal. At the top left is the SWBC logo. In the top right corner, there are links for "Help" and "Contact Us". The main login area is titled "Log In" and contains the following elements:

- Two input fields: "User ID (Email):" and "Password:".
- A checkbox labeled "Remember me next time."
- A blue link: "Forgot your password?"
- A grey "Log In" button.

Entering in a Contract

The user will click on the **Contract** tab, and then select **Entry** as displayed in Figure 1.

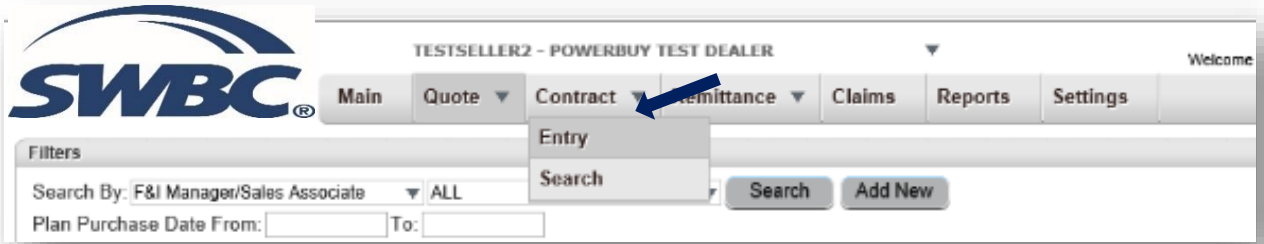


Figure 1

If the user enters contracts for multiple locations, please be sure to select the appropriate location from the account drop down as shown in Figure 2 and Figure 3 prior to entry.

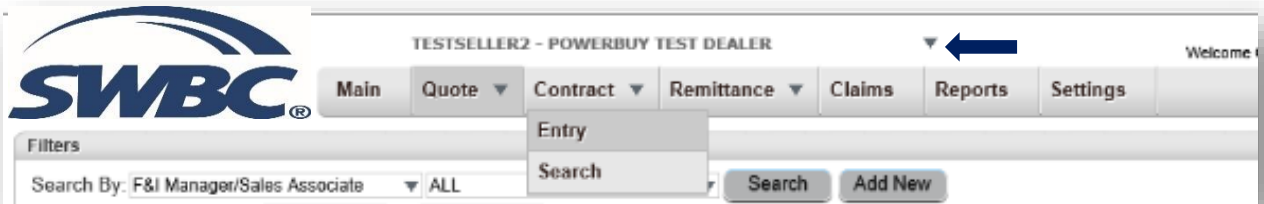


Figure 2

There will be a search bar for the user to locate the appropriate location.



Figure 3


Contract Entry

The **Contract Entry** page is designed for the seller's office clerk to enter and submit sold contracts. The user will have to enter the forms contract number; it will **NOT** be auto generated. Once you have navigated to the **Contract Entry** Page, Figure 4 below will appear.

All of the highlighted fields are required to submit a contract.

The screenshot shows a web form titled "Contract Entry" with several sections. The "Deal Type" dropdown is set to "Loan" and the "Depr" checkbox is checked. The "Customer" section includes fields for First Name, MI, Last Name, Title, Address, Address 2, City, State (OH), ZIP, Primary Phone, Secondary Phone, Email, Alternate Contact, and Language (English). The "Vehicle" section includes VIN, Odometer, Mfg. Warr. Start Date, Veh. Purchase Price, and Veh. Purchase Date. The "Attributes" section includes Stock #, Base Warranty, and Powertrain Warranty. The "Loan/Lease" section includes Term, Finance Amt, MSRP, APR, Monthly Pmt, 1st Pmt Date, Balloon Amt, Residual Amt, and Acct. #. The "Lienholder" section includes Lienholder Name, Address, Address 2, City, State, ZIP, Primary Phone, and Email. The "Products" section includes Product, Contract #, Program, Type Plan, Term, Deductible, Cost (Not Rated), Retail (excl. taxes), and Options. The "Save", "New", and "Close" buttons are at the bottom right.

Figure 4

If you enter a VIN that does not automatically populate the attributes, please click on the  directly beside attributes to proceed with entering in Year, Make and Model.

Note: If the contract entered is ineligible, you will not be able to select a program or plan under the Products section. You will need to verify that the information for Year of the vehicle, Vehicle Purchase Price, MSRP, Plan Purchase Date, and Vehicle Purchase Date were entered correctly to determine if the contract is eligible based on the product eligibility criteria.

After all accurate information is entered, the Products section will generate the program and plan available to the seller. The user will enter in the Contract # and the consumer cost in the Retail field. The program and plan will auto-populate for you (Figure 5).

The screenshot shows a 'Contract Entry' form with the following sections:

- Plan Purchase Date:** 06/17/2016
- Deal Type:** Loan
- Deal Products:** F&I Manager/Sales Associate
- Customer (Tester, Test):**
 - First Name: Test, MI: , Last Name: Tester, Title:
 - Address: 440 Polaris, Address 2: , City: Westerville, State: OH, ZIP: 43082
 - Primary Phone: , Secondary Phone:
 - Language: English
- Vehicle (2008/INFINITI/G35):**
 - VIN: JNKBV61E68M211200
 - Odometer: , Mfg. Warr. Start Date: , Veh. Purchase Price: \$28,500.00, Veh. Purchase Date: 06/17/2016
 - Attributes: (2008/INFINITI/G35/Car Compact Luxury Traditional/6 Cyl/Rear Wheel Drive/Gas)
 - Year: 2008, Make: INFINITI, Model: G35
 - Aspiration: N/A, Cyl: 6 Cyl, Driving Wheels: Rear Wheel Drive, Fuel: Gas, Ton Rating: N/A, GVWR: N/A, Segmentation: Car Compact
 - Stock #: , Base Warranty: 48 / 60,000, Powertrain Warranty: 72 / 70,000
- Loan/Lease:**
 - Term: 60, Finance Amt: \$25,000.00, MSRP: \$30,000.00, APR: , Monthly Pmt: , 1st Pmt Date: , Balloon Amt: , Residual Amt: , Acct. #:
- Lienholder:**
 - Lienholder Name: SECURITY FIRST FEDERAL CU
 - Address: PO BOX 4829, Address 2: , City: MCALLEN, State: TX, ZIP: 78502
- Products:**

Product	Contract #	Program	Type Plan	Term	Deductible	Cost	Retail (excl.taxes)	Options
Depr	55000	SWBC PowerBuy Auto	Auto PowerBuy - \$6000 Ben	48 months		\$195.00	\$295.00	

Figure 5

Next the user will click **Save**. This will move the contract into a pending queue for remittance. If the user has additional contracts to enter, you will click on **Save & New**.

This is a close-up of the 'Products' section from the screenshot above. It shows the table with one row of data. A blue arrow points to the 'Save' button at the bottom right of the table.

If all contracts have been entered, the user will proceed to **Creating a Remittance**.

Key items to Remember:

1. Be sure to include the Prefix before the contract number. Ex: PB6K00012
2. The retail amount is equal to the membership purchase price
3. Any vehicle older than current year plus 9 is not eligible
4. Any vehicle (as stated on the form) over \$128,000 MSRP or Vehicle Purchase Price is not eligible
5. Any RV over \$240,000 MSRP or Vehicle Purchase Price is not eligible
6. The membership cannot be old after 365 days of the vehicle sale date

Creating A Remittance

To create a remittance, the user will click on the **Remittance** tab and then **Create** as shown in figure 6.

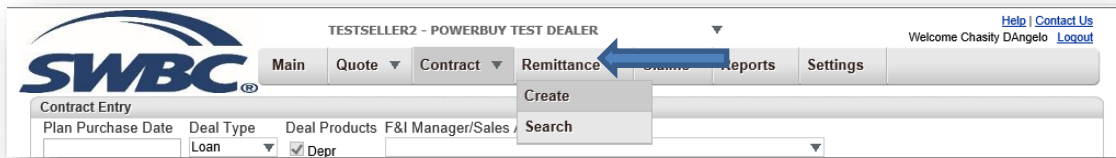


Figure 6

Once you click on **Create**, you should be automatically directed to the screen displayed in **Figure 7** below. This page will display valid contracts ready for remittance. This will list all the contracts that have been entered for submission.

Create Remittance

Product: Depr Program: ALL

Lienholder: ANY Plan: ALL DATES

Date:

[Include This Page](#) [Exclude This Page](#) [Include All Pages](#) [Exclude All Pages](#)

		Due From	Contract Count	Remit Due
TOTAL			0	\$0.00

Contracts

Include	Customer	VIN	Purchase Date	Contract #	Plan Description	Term	Lienholder	Total Contract Due	Due From
<input type="checkbox"/>	Tester, Test	JNKBV61E68M211200	06/17/2016	55000	Auto PowerBuy - \$6000 Benefit	48	SECURITY FIRST FEDERAL CU	\$195.00	Seller-TESTSELLER2
<input type="checkbox"/>	tester1, test1	KNDJC735985796418	06/16/2016	PB6K00012	Auto PowerBuy - \$6000 Benefit	48	SECURITY FIRST FEDERAL CU	\$195.00	Seller-TESTSELLER2

<< Prev Page of 1 Next >> Records Per Page:

[Preview Remittance](#) [Download All to Spreadsheet](#)

Figure 7

Note: All contracts will be listed that are ready for remittance. You have the ability to sort the listing by lienholder and purchase date.

To select the contracts to remit, the user will mark the boxes next to each customer name or use the selections available for Include This Page, Include All Pages, etc on the page to select all contracts. As shown in figure 8.

[Include This Page](#)
[Exclude This Page](#)
[Include All Pages](#)
[Exclude All Pages](#)

Include	Customer	VIN	Purchase Date	Contract #	Plan Description	Term	Lienholder	Total Contract Due	Due From
<input type="checkbox"/>	Tester, Test	JNKBV61E68M211200	06/17/2016	55000	Auto PowerBuy - \$6000 Benefit	48	SECURITY FIRST FEDERAL CU	\$195.00	Seller-TESTSELLER2
<input type="checkbox"/>	tester1, test1	KNDJC735985796418	06/16/2016	PB6K00012	Auto PowerBuy - \$6000 Benefit	48	SECURITY FIRST FEDERAL CU	\$195.00	Seller-TESTSELLER2

<< Prev Page of 1 Next >> Records Per Page:

[Preview Remittance](#)
[Download All to Spreadsheet](#)
Save Submit

Figure 8

After you have selected the contracts you wish to submit, you will proceed to clicking on the **Submit** button in Figure 9.

Include	Customer	VIN	Purchase Date	Contract #	Plan Description	Term	Lienholder	Total Contract Due	Due From
<input checked="" type="checkbox"/>	Tester, Test	JNKBV61E68M211200	06/17/2016	55000	Auto PowerBuy - \$6000 Benefit	48	SECURITY FIRST FEDERAL CU	\$195.00	Seller-TESTSELLER2
<input checked="" type="checkbox"/>	tester1, test1	KNDJC735985796418	06/16/2016	PB6K00012	Auto PowerBuy - \$6000 Benefit	48	SECURITY FIRST FEDERAL CU	\$195.00	Seller-TESTSELLER2

<< Prev Page of 1 Next >> Records Per Page:

[Preview Remittance](#)
[Download All to Spreadsheet](#)
Save Submit

Figure 9

Also, you can preview your remittance before it is permanently submitted by clicking on **Preview Remittance PDF** or **Download All to Spreadsheet** icons at the bottom of the page (Figure 10).

[Include This Page](#)
[Exclude This Page](#)
[Include All Pages](#)

Include	Customer	VIN
<input checked="" type="checkbox"/>	Doe, Jane	1FTWW32R38EB06639

[Preview Remittance](#)
[Download All to Spreadsheet](#)

Figure 10

Once you click on the **Submit** button, a popup (Figure 11) will appear indicating the number of contracts and amount to be remitted to SWBC. Once you have validated the amount, you can click Submit. If you have changes, you can click Go Back to make changes. If you do Go Back, this will require that you resubmit the contracts.

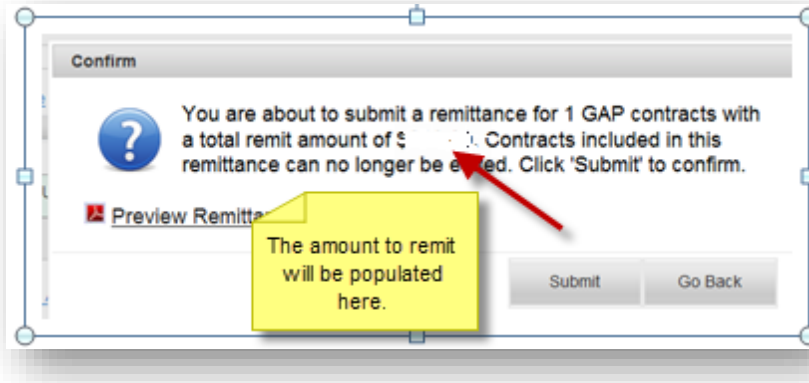


Figure 11

Once you have submitted the contracts, a Remittance register will automatically display (Figure 12). Be sure to print and mail to SWBC along with payment.

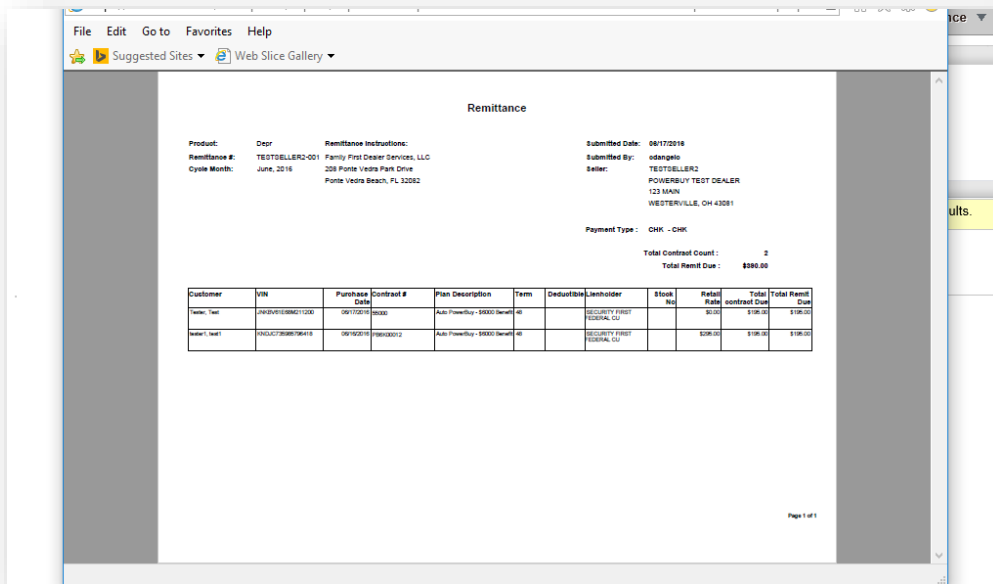


Figure 12

Remittance Search

To view previously submitted **Remittances**, the user will click on **Remittance**, then Search (Figure 13).

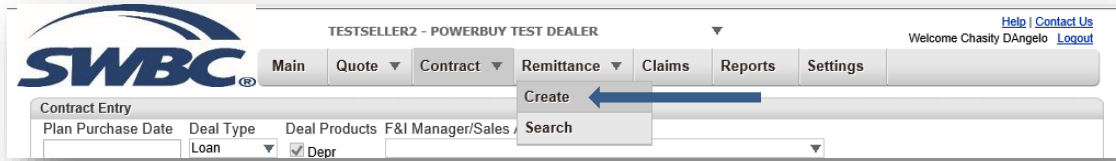


Figure 13

A new page will appear that will provide all previously submitted remittances. You can search by a submission date using the filters provided below (Figure 14).

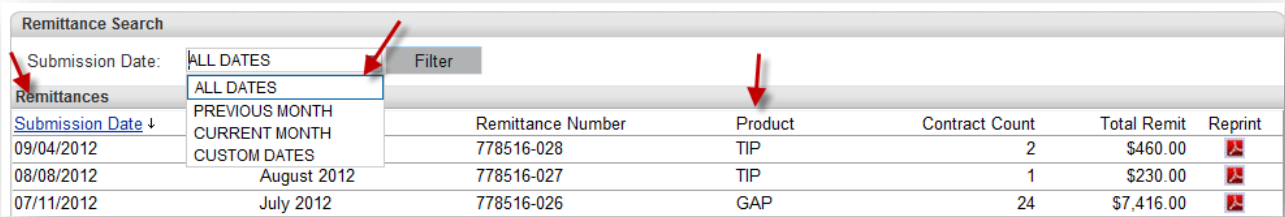


Figure 14

You will also be able to reprint the Remittance from this page by clicking on the PDF icon.

Contract Search

To look up a previously submitted contract to check the status, void the contract, or change information pertaining to that contract, click on **Contract**, then **Search**. There will be several filters to utilize to locate a contract. Those filters are displayed below in Figure 15.

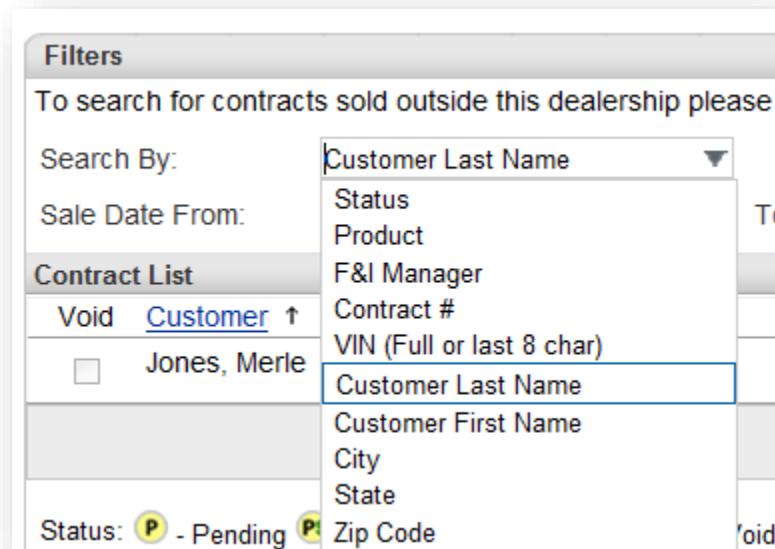


Figure 15

Once you have entered in the search criteria and clicked Search, a page will appear with a list of contracts that meet the search criteria (figure 16). If you have not submitted the contract, you can also click on the Void button after the contract information screen comes up. The Contract Status is the icon directly beside the Contract #. A legend is at the bottom of the screen that provides the descriptions of each Status.

Once you have located the contract, you can click on the Contract # to bring up the contract. At this time, you may be able to view or edit the contract. If you update the contract, a popup will display to confirm the change.

The screenshot shows a web interface for searching contracts. At the top, there are filters and search options. Below that is a table with columns for Void, Customer, VIN, Purchase Date, Product, Contract #, Term*, Retail, and Edit. The table contains five rows of contract data. At the bottom, there is a status legend and buttons for 'Clear Selected' and 'Void Selected'.

Void	Customer	VIN	Purchase Date	Product	Contract #	Term*	Retail	Edit
<input type="checkbox"/>	Tester, Test	JNKBV61E68M211200	06/17/2016	Depr	55000	48	\$0.00	
<input type="checkbox"/>	tester1, test1	KNDJC735985796418	06/16/2016	Depr	PB6K00012	48	\$295.00	
<input type="checkbox"/>	Smith, Test	5NPEC4ACXDH732190	06/15/2016	Depr	PB6K00033238	48	\$800.00	
<input type="checkbox"/>	Jackson, Debbie	5NPEB4AC1CH439702	06/15/2016	Depr	PB6K00033245	48	\$800.00	
<input type="checkbox"/>	Smith, Sam	5NPEC4ACXDH732190	06/14/2016	Depr	PB6K00033223	48	\$800.00	

Status: - Pending - Pending-Billed - Active - Void - Cancelled - Expired - Rejected

Figure 16

Quote Settings

The Quote functionality is designed for the F&I office to be able to quote contracts and to be able to submit and print contracts.

For first time users, the Base Markup and Retail Price Limits in Settings for the plans will need to be configured before you will be able to save or submit a Quote. Only authorized users at your dealership or SWBC will have access to configure the base retail amounts (Figure 17). Note: The Retail amount may be changed.

The screenshot shows the 'Settings' menu item highlighted with a blue arrow. Below it is the 'Quote Settings' configuration page. The page has three sections: 'Base Markup', 'F&I Markup', and 'Retail Price Limits'. Each section has input fields for 'Add \$' and 'OR %', a 'Whichever is' dropdown set to 'Greater', and an 'Exceptions' link. 'Save' and 'Cancel Changes' buttons are present at the end of each section.

Figure 17

You will also setup your F&I Managers on the **Settings** tab (Figure 18). You will enter in the First Name and Last Name and then click on **Active** button. Once you have entered the information, the **Save** icon will display to Save the information.

The screenshot shows a web interface for managing F&I Managers/Sales Associates. At the top, it says "Date Range : (01-Jun-2016 to Current)". Below that is a section titled "F&I Manager/Sales Associates". It contains a table with the following columns: "Active", "First Name", "Last Name", and "Edit". There are three rows of input fields. The first two rows have checkboxes checked, and the third has it unchecked. The Edit column contains icons for editing and deleting.

Figure 18

Entering a New Quote

Once you have setup the Settings for the Dealership, you can start entering Contract Quotes (Figure 19).

In order to **Quote** a new contract, you will need to click on **Quote**, then **New** to be able to enter a new contract.

The screenshot shows a navigation menu for a dealership. The menu items are: Main, Quote, Contract, Finance, Claims, Reports, and Settings. The 'Quote' menu item is highlighted, and a blue arrow points to the 'New' sub-menu item. Other menu items include Main, Contract, Finance, Claims, Reports, and Settings.

Figure 19

Once you click on New, the following page will appear. If you only need to obtain a quote for a product, the Customer and Lienholder information will not need to be completed. Otherwise, all of the yellow highlighted fields must be entered in Figure 20.

The screenshot shows a form for entering a new quote. The form is divided into sections: Customer, Vehicle, Loan/Lease, and Lienholder. Yellow highlights indicate required fields for a quote. The Customer section includes fields for First Name, MI, Last Name, Title, Address, Address 2, City, State, ZIP, Primary Phone, and Secondary Phone. The Vehicle section includes fields for VIN, Odometer, Mfg. Warr. Start Date, Veh. Purchase Price, and Veh. Purchase Date. The Loan/Lease section includes fields for Deal Type, Term, Finance Amt, MSRP, APR, Monthly Pmt, 1st Pmt Date, Balloon Amt, Residual Amt, and Acct. #. The Lienholder section includes fields for Lienholder Name, Address, Address 2, City, State, ZIP, Primary Phone, and Email.

Figure 20

If the contract is ineligible, the **Products** section of the page will have a message that the vehicle is not eligible as illustrated in figure 21 Please verify the following fields were entered correctly **Year of the vehicle, Vehicle Purchase Price, MSRP, Plan Purchase Date, and Vehicle Purchase Date** to determine if the contract is eligible based on the product eligibility criteria.

Otherwise, if the contract information was entered correctly it doesn't meet the eligibility criteria for the product.

Figure 21

Rating the Contract

Once the required information has been entered, the program and plan will automatically populate (figure 22).

Figure 22

Submitting an Eligible Quote

In order to submit and print the contract, click on the **Submit** button. If you are not ready to submit and print, but would like to preview the contract click on the icon beside Submit; or you may save the Quote by clicking on Save Quote.

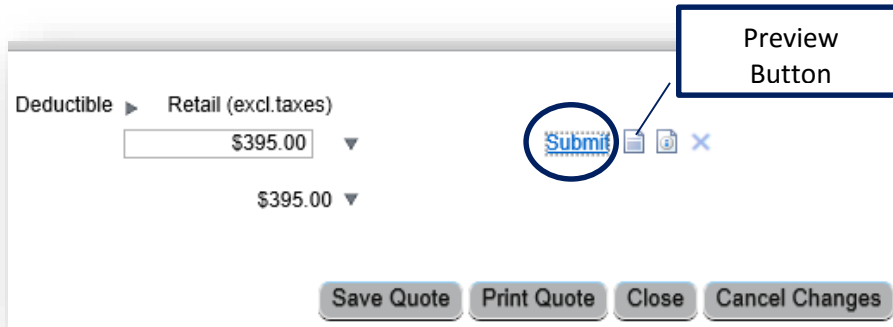


Figure23

If you click on Submit, another window will appear with a PDF copy of the contract that was selected for you to print for the customer to sign. Please verify the information is correct before remitting.

A message will appear on the contract screen that states “Contracts have been submitted for all available products”.

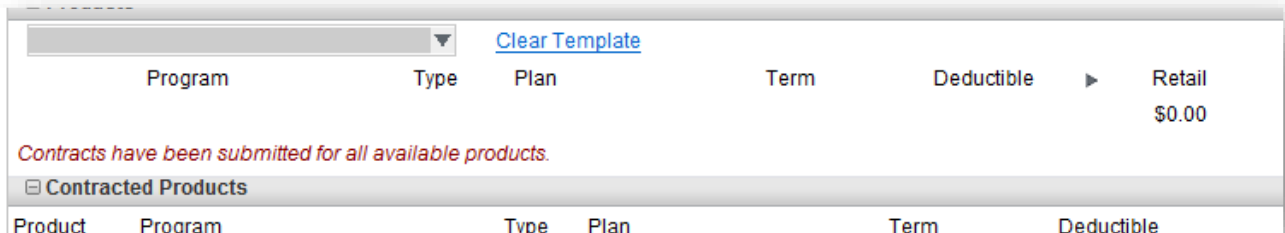


Figure 24

Note: The business office will need to proceed to the Remittance section of this manual to obtain instructions on how to remit the Quotes to SWBC, as well as the total amount to be remitted.

Mailing Remittances:

Please have remittances delivered to National Auto Care c/o Family First Dealer Services, LLC as indicated in the product Procedural Manual. Please be sure to make checks payable to the below:

SWBC
Attn: Business Processing Department
440 Polaris Parkway Suite 250
Westerville, OH 43082



Dealer Contact Information

If you have any questions or need assistance, please see key contact information below.

Contact Information:	
Sales/Administration Office Hours:	8:30am ET to 5 pm ET
Website:	www.swbc.com
Dealer Account Portal:	www.swbcpowerbuy.com
Dealer Account Portal Support/General Inquiries:	DealerMgmt@SWBC.com
Cancellations	CancellationsPB@SWBC.com or Call (877)463-4266 Fax (614)438-7423
Supply Requests:	DealerMgmt@SWBC.com
Hours of Operation/Claims & Benefits:	8:30am ET to 5 pm ET
Remit to address:	SWBC ATTN: Business Processing 440 Polaris Parkway, Suite 250 Westerville, OH 43082
General Fax:	(614) 438-7423
Benefit Request Contact Information:	
Benefit Requests:	Email: ClaimsPB@SWBC.com Call: (877)463-4266