

User Guide

Woodwest Ascent Admin

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1 Features

1.1 Contracts

1.1.1 [ABPT-6] Contract Sale Date Configuration Update while Creating New Contracts

This enhancement removes the restriction on entering a *Contract Sale Date* when creating new contracts. Previously, you could only backdate the *Contract Sale Date* up to **seven (7) days** from the current date. With this update, you can now enter a *Contract Sale Date* for **any time frame**, offering greater flexibility for recording historical or adjusted contract entries.

How to Access This Feature:

1. **Navigate to the Contracts Page:** Click **Contracts > Contracts** from the main navigation menu. The Contracts screen displays.

Status	Contract Number	VIN	Product Type	Customer	Activation Date	Expiration Date
Pending	ADRVSC2510193874	4T1G11AKRU193874	VSC	Derry John		01/28/2034
Pending	PNCPPM251005160609	1FTEW1EP8NKD51606	PPM	Ramisa Zaman		10/27/2028

2. **Creating a new Contract:** Click the **Add Contract**  icon to add a new Contract.

The Add Contract screen displays.

Add Contract

Select Dealer

Dealer *
#1 Auto Liquidators | DL00003968

3. **Enter Dealer Details:** Proceed with the standard contract creation process by selecting the dealer in **Dealer** drop down menu.
4. Click the **Next** button.



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Add Contract

Select Dealer

Vehicle Information

Financial Information

Select Coverages

Customer Information

VIN *
Enter VIN Number

Year *
Select Year

Type *
New

In-Service Date *
10/30/2025

Deal #
Enter Deal Number

Make *
Select Make

Sale Odometer *
0

Vehicle Sale Date
MM/DD/YYYY

Stock #
Enter Stock Number

Model *
Select Model

Contract Sale Date *
10/30/2025

Calendar: October 2025

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

- Enter Contract Sale Date:** In the **Vehicle Information** step, locate the **Contract Sale Date** field.
 - You can now select **any date**, without restrictions on backdating.
 - The system no longer limits the *Contract Sale Date* to within seven (7) days of the current date.
- Save or Proceed:** Continue with the remaining steps in the contract creation process or click **Save** to store the new contract details.

1.1.2 [ABPT-1]: Coverages Not Showing for “Pre-Owned” Type of Vehicles

This update fixes an issue where coverages were not displaying under the **Select Coverages** step while adding new contracts when the Vehicle Type was set to “Pre-Owned” in the **Type** drop-down menu under the Vehicle Information step.

With this fix, the system now correctly displays the applicable coverages regardless of whether the Vehicle Type selected is “New” or “Pre-Owned.”

How to view this change:

- Navigate to Contracts:** Click **Contracts > Contracts** from the main navigation menu. The **Contracts** screen displays.

Contracts / Contracts

Search

Contracts

Status	Contract Number	VIN	Product Type	Customer	Activation Date	Expiration Date
Pending	AMPTRG2510001559	3JBKUAX47TK001559	TRG	Testy McTester		10/28/2026

- Add a New Contract:** Click the **Add Contract** icon. The **Add Contract** screen displays.
- Select Dealer:** From the **Dealer** drop-down menu, select the desired dealer.



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Add Contract

Select Dealer

Vehicle Information

Dealer *

#1 Auto Liquidators | DL00003968

3

4. **Proceed to Vehicle Information:** Click the **Next** button to move to the **Vehicle Information** step.

5. **Enter Vehicle Details:** Enter the VIN in the **VIN** text box.

The **Make**, **Model**, and **Year** fields are automatically populated based on the VIN entered.

Add Contract

Back

Select Dealer

Vehicle Information

Financial Information

VIN *

SAJWJ0EF9E8V09984

5

Year

2014

Make

JAGUAR

Model

XF

Type *

New

6

Sale Odometer *

12,000

Contract Sale Date *

11/02/2025

In-Service Date *

11/02/2025

Vehicle Sale Date

MM/DD/YYYY

Vehicle Purchase Price *

\$15,000.00

6. **Select Vehicle Type:** From the **Type** drop-down menu, select **"New."**

7. **Enter Additional Details:** Enter values for other mandatory fields such as **Sale Odometer**, **Contract Sale Date**, **In-Service Date**, and **Vehicle Purchase Date**.

8. **Proceed to Coverages Step:** Click the **Next** button to navigate to the **Select Coverages** step.

9. **Verify Coverage Display:** In the **Select Coverages** step, verify that coverages are now displayed correctly even when **"New"** is selected in the **Type** drop-down menu.

Contracts / Contracts / Add

Add Contract

Select Dealer

Vehicle Information

Financial Information

Select Coverages

VSC

☐ ELEVATE POWERTRAIN PLUS - LONG TERM

Term: 12/12000

Class: PTX

Tier: 025

Vehicle: *

\$294.00

☐ PINNACLE POWERTRAIN PLUS - LONG TERM

Term: 12/12000

Class: PTX

Tier: 025

Vehicle: *

\$560.00



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1.1.4 [ABPT-21] Sale Odometer Information in Contract Header

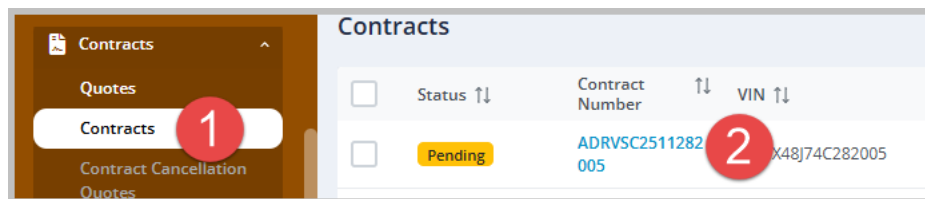
Now, the Sale Odometer reading related to the vehicle is visible in the header details of the contract for quick viewing.

This enhancement introduces the **Sale Odometer** field in the **Contract Header** section to provide you with a quick view of the vehicle's odometer reading at the time of sale.

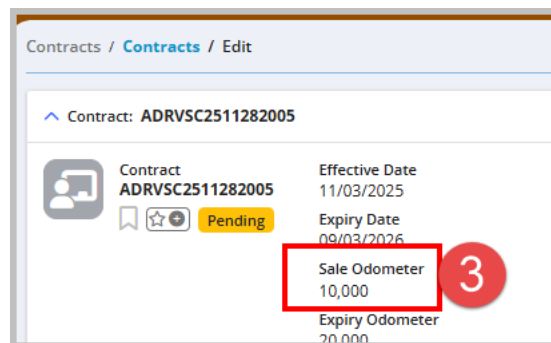
Previously, users needed to navigate to the **Details tab** section to view this detail. With this update, the **Sale Odometer** value is now displayed prominently in the header area of the contract.

How to view this change:

1. **Navigate to Contracts:** Click **Contracts > Contracts** from the main navigation menu. The Contracts screen displays.



2. **Open a Contract:** Select the specific contract from the list. The selected contract opens in a new tab.



3. **Verify Sale Odometer Display:** In the **Contract Header** section, confirm that the **Sale Odometer** field is now visible for quick reference.

1.1.5 Introduction of New “Payees” Tab in Contract Details

A new tab titled “**Payees**” has been added to the contract details screen. This enhancement allows you to view payee-related financial allocations linked to the contract.

The Payees tab displays the following information in a structured table format:

- Payee Name
- Bucket Category
- Bucket Name
- Amount



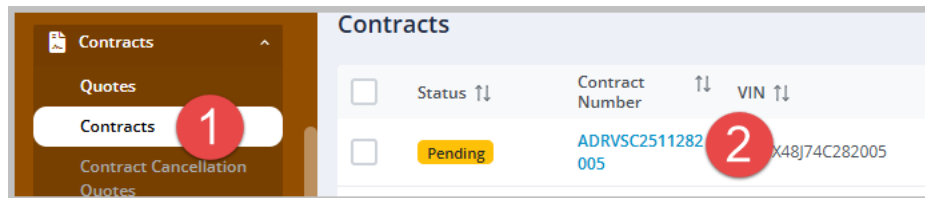
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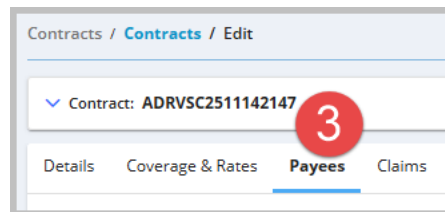
This addition provides clearer visibility into how funds are distributed across payees and simplifies review of payout structure within a contract.

How to access this feature:

1. **Navigate to Contracts:** Click **Contracts > Contracts** from the main navigation menu.
The Contracts screen displays.



2. **Open a Contract:** Select the specific contract from the list.
The selected contract opens in a new tab.



3. **Open the Payee tab:** Click the **Payee** tab.
You can view payee-related financial allocations linked to the contract.

1.1.6 Co-Buyer Information Step in Add Contract Stepper

A new **Co-Buyer Information** step has been added to the **Add Contract** stepper workflow to better organize customer and co-buyer details. All co-buyer data is now captured in its own dedicated step, improving clarity and reducing confusion during contract creation.

A checkbox "Same as Customer Address" is available that allows:

- Auto-populating the co-buyer address from the customer address when checked.
- Manual entry if the addresses are different.

When a co-buyer is added, a separate Co-Buyer/Alt. Name field is displayed below Customer Information in the Contract Details page.

How to access this feature:

1. **Navigate to the Add Contract Page:** Click **Contracts > Contracts** from the main navigation menu.
The **Contracts** screen displays.



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Status	Contract Number	VIN	Product Type	Customer	Activation Date	Expiration Date
Pending	ADRVSC2511282015	1J4GX48J74C282015	VSC	Theomy Williamson		09/04/2026
Active	ADRVSC2511142147	1G4HR54K75U142147	VSC	1103 2025		09/03/2026

2. **Start Creating a New Contract:** Click the **Add Contract** icon. The **Add Contract** stepper displays.
3. **Proceed Through Standard Contract Steps:** Enter the required information and move through the following steps:
 - Select Dealer
 - Vehicle Information
 - Financial Information
 - Select Coverages
 - Customer Information

First Name * John

Last Name * Doe

☒ Same as Customer address

Address Line 200 West Street 200 West Street

City New York

State NY - New York

Zip Code 10282

Country United States

Primary Phone +1 () - Ext

Secondary Phone +1 () - Ext

Email Account

Save Quote Previous Next

4. **Enter Co-Buyer Details:** On the **Co-Buyer Information** step, enter the co-buyer's First Name, Last Name, Address, and Phone Number.
5. **Use "Same as Customer Address" (Optional):** Click the **Same as Customer Address** checkbox if the co-buyer lives at the same address. The address auto-populates.



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6. **Complete Contract Creation:** Finish the remaining steps and save the contract.
7. **Open the Newly Created Contract:** From **Contracts > Contracts**, click the newly created contract. The Contract Details page displays.

Contract: CALCPT2511V09984

Details Coverage & Rates Payees Claims Transactions Documents

Customer Information

First Name *
john

Last Name *
paul

Primary Phone

Secondary

Email

Co-Buyer/Alt. Name 8
John Doe

8. **View Co-Buyer Details:** Under the **Details** tab, in the **Customer Information** section, the **Co-Buyer/Alt Name** field displays the saved co-buyer information.
9. **Edit Co-Buyer Information (If Required):**
 - a. Click the **Edit (pencil) icon** next to the Co-Buyer/Alt Name field.
 - b. Click **Edit Co-Buyer/Alt** to open the Co-Buyer Information window.
10. **Save Changes:** Update the required fields and click **Save**. The updated co-buyer information is stored successfully.

1.1.7 Exception Report for Contracts with missing Payees

This enhancement automates the notification process for contract administrators to identify contracts that have missing payee details in one or more buckets. The system will automatically detect contracts in **Active** or **Pending** status that contain one or more buckets without assigned payees.



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Exception : Contract Buckets missing Payees

Duration:

#	Contract Number	Dealer Number	Status	Effective Date	Bucket Name	Amount	Payee
1	BLW10000395	DL405-DEMO	Pending	03/23/2026	Base Reserve	\$25.00	-
2	BLW10000395	DL405-DEMO	Pending	03/23/2026	Base Admin	\$31.10	-
3	BLW10000395	DL405-DEMO	Pending	03/23/2026	Agent Commission	\$5.00	-
4	BLW10000395	DL405-DEMO	Pending	03/23/2026	CLIP	\$3.90	-
5	BLW10000006	1235	Pending	01/20/2026	Base Admin	\$14.10	-
6	BLW10000006	1235	Pending	01/20/2026	Agent Commission	\$22.00	-
7	BLW10000006	1235	Pending	01/20/2026	CLIP	\$3.90	-
8	BLW10000006	1235	Pending	01/20/2026	Base Reserve	\$25.00	-
9	OP10362598	DL00001501	Pending	12/13/2025	Agent Commission	\$540.00	-
10	OP10362403	DL00004262	Pending	12/13/2025	CLIP	\$18.14	-
11	OP10362403	DL00004262	Pending	12/13/2025	Base Admin	\$193.86	-
12	OP10362403	DL00004262	Pending	12/13/2025	VIN Decoded Surcharge Reserve	\$200.00	-
13	OP10362403	DL00004262	Pending	12/13/2025	Agent Commission	\$555.00	-
14	OP10362598	DL00001501	Pending	12/13/2025	Base Reserve	\$279.00	-
15	OP10362598	DL00001501	Pending	12/13/2025	Dealer Hard Pack	\$600.00	-
16	OP10362598	DL00001501	Pending	12/13/2025	VIN Decoded Surcharge Reserve	\$75.00	-
17	OP10362598	DL00001501	Pending	12/13/2025	Base Admin	\$143.86	-
18	OP10362598	DL00001501	Pending	12/13/2025	CLIP	\$18.14	-
19	OP10362403	DL00004262	Pending	12/13/2025	Base Reserve	\$279.00	-
20	OP10362403	DL00004262	Pending	12/13/2025	Dealer Hard Pack	\$300.00	-

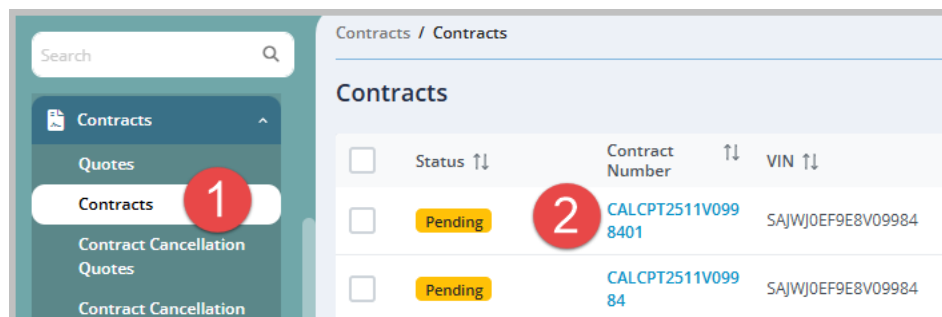
1.1.8 [ABPT-23] Updated Contract Number Validation Logic

The system has been enhanced to validate Contract Numbers more accurately during contract creation and search.

- A minimum of **6 characters** is now required for Contract Number entry.
- If you enter **exactly 6 characters**, the system compares only the **last 6 digits** of the Contract Number.
- If you enter **more than 6 characters**, the **entire Contract Number** is compared.
- A descriptive **label/legend** has been added below the Contract Number field to explain this validation rule to users.

How to view this change:

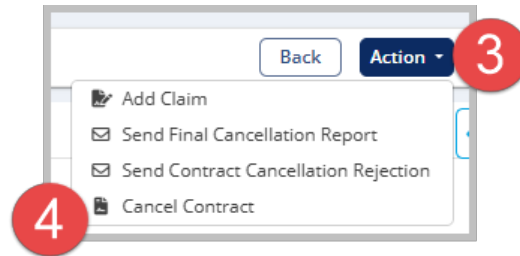
1. **Navigate to the Contracts Page:** Click **Contracts > Contracts** from the main navigation menu. The **Contracts** screen displays.



2. **Open a Specific Contract:** Select the contract you want to cancel. The contract opens in a new tab.
3. **Begin Cancellation Process:** Click the **Actions** menu.



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4. Select the **Cancel Contract** option.

The **Contract Cancellation** screen displays.

5. **View Updated Validation Message:** In the **Locate a Contract** step, a descriptive label is now visible below the **Contract Number** field explaining the new 6-character validation logic.

1.1.9 Showing Rate Sheet Along with Deductibles in Select Coverages Step

This enhancement ensures that when a **coverage** has the **Deductible Type** set as **Flat Adjustment** and deductibles are added under the **Deductible** tab, both the **Rate Sheets** and the associated **Deductibles** are displayed correctly during contract creation.

When such coverages are fetched in the **Select Coverages** step while adding a contract, the system now displays the applicable **Rate Sheet details** along with the corresponding **Deductible information** for the said class of vehicles, providing full visibility of pricing and deductible structure for accurate contract setup.



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1.2 Dealers

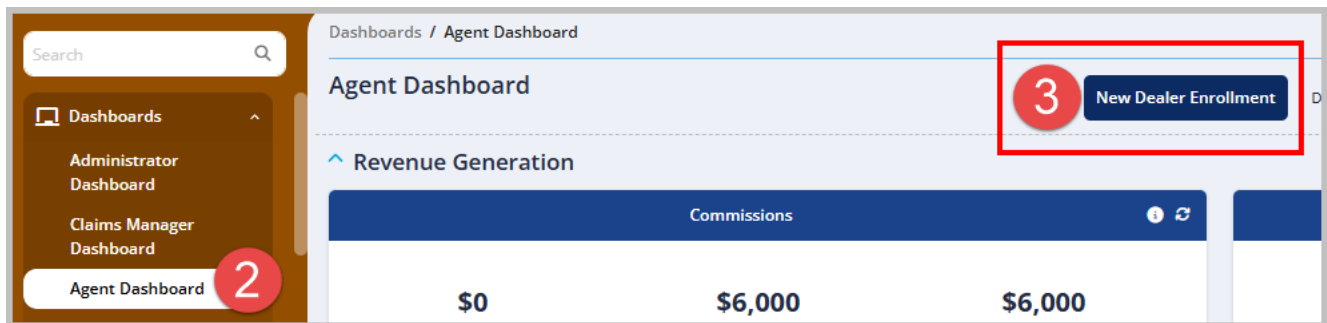
1.2.1 [ABPT-3] Rename "+ Dealer Profile" Button to "New Dealer Enrollment"

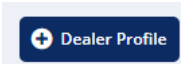
This enhancement updates the button label on the Agent Dashboard for initiating the dealer onboarding process.

Previously, the button was labeled “+ Dealer Profile”, which opened the Dealer Onboarding Wizard. It has now been renamed to “**New Dealer Enrollment**” for better clarity and alignment with the dealer onboarding workflow.

How to View This Change

1. **Log in to the Ascent Administration Portal:** Log in using valid **Administrator** credentials. The **Administrator Dashboard** displays.
2. **Navigate to the Agent Dashboard:** Click **Dashboards > Agent Dashboard** from the main navigation menu. The **Agent Dashboard** screen displays.



3. **Verify the Updated Button Label:** On the Agent Dashboard, locate the button previously labeled “+ Dealer Profile.”  This button has now been renamed to “**New Dealer Enrollment**” and continues to open the Dealer Onboarding Wizard when clicked.

1.2.2 [ABPT-12] Opening Dealer Profiles in New Tab

1. When you right-click on the dealer number, the “**Open in New Tab**” option is available in right-click context menu.
2. After pressing **CTRL + Clicking the dealer number hyperlink**, the dealer profile opens in the new tab while keeping the filtered list in “All Dealers” page intact.

With this update, you can now open multiple dealer profiles simultaneously in separate tabs while maintaining their filtered view on the All Dealers page.

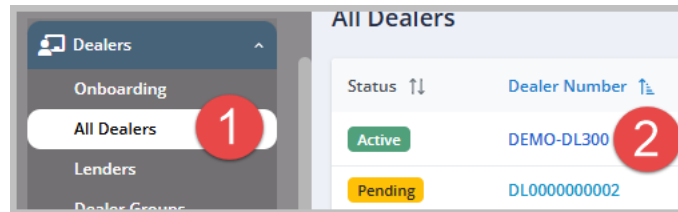
How to view this change:



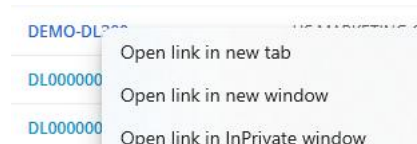
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1. **Navigate to All Dealers:** Click **Dealers > All Dealers** from the main navigation menu. The **All Dealers** page displays.



2. **Access the Context Menu:** Right-click on any specific **Dealer Number** in the list. The **right-click context menu** displays.



3. **Verify the New Tab Option:** In the context menu, confirm that the **“Open Link in New Tab”** option is available.
4. **Use Keyboard Shortcut for Quick Access :** Press **CTRL + Click** on the **Dealer Number** hyperlink. The selected dealer profile opens in a new browser tab, while the filtered list on the **All Dealers** page remains intact.

1.2.3 [ABPT-26] Fix for Dealer Onboarding via Email Not Loading in System

Due to a missing configuration in the onboarding workflow. With this fix, the configuration has been corrected, and dealers submitted via email are now successfully onboarded and loaded into the system, along with their attached documents.

1.2.4 [ABPT-24] Duplicate Product Type Issue in Agent and Dealers

This update fixes an issue where duplicate product type options appeared in the **Product Type** drop-down menu under **Agent > No Charge Back** tab.

The logic to display product type is different for Dealers and Agents. It is mentioned as below:

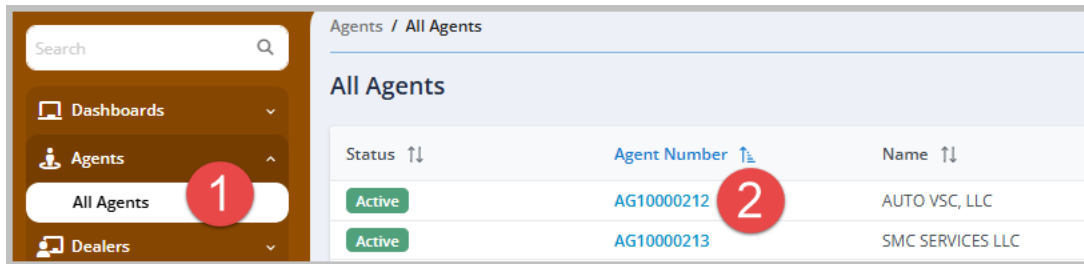
- For **Dealers**, the **Product Type** drop-down shows only those products types associated with the coverages assigned to that particular dealer. These coverages can be managed under the Coverages tab in the Dealer Details page.
- For **Agents**, since coverages are not directly assigned, all product types remain visible in the **Product Type** drop-down menu

How To View This Change:

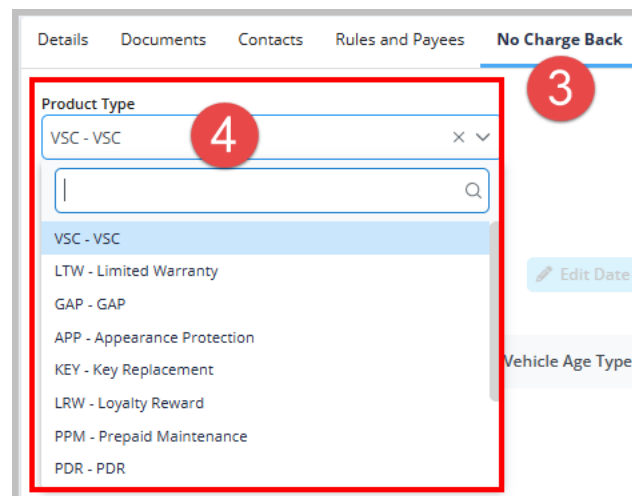
1. **Navigate to Agents:** Click **Agents > All Agents** option from the main navigation menu. The All Agents screen displays.



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2. **Select an Agent:** Click the specific Agent from the list.
The Agent Details screen displays.
3. **Open the No Charge Back Tab:** Click the **No Charge Back** tab to view the configuration details.



4. **Verify Product Type Options:** Click the **Product Type** drop-down menu.
All Product Types are visible in the list, as coverages are not assigned at the agent level.

1.2.5 [ABPT-25] Dealer Group Access Causing Logout Issue

When users accessed the Dealer Group tab under a newly created dealer, the system would terminate the session and require re-login.

With this updated permission configuration Users can now:

- View and modify the Dealer Group assigned to a dealer.
- Access the **Dealer Group** option in the main navigation menu without being logged out.

1.2.6 [ABPT-5] Hyperlink on Coverages Removed for Dealers and Agents

This update ensures that **Dealers** and **Agents** no longer have access to backend coverage details.

Previously, when logged in as a dealer or agent, all **Coverage Names** and **Coverage Codes** on the Coverages home page appeared as clickable hyperlinks. The coverage names and coverage codes are now displayed as non-clickable text. Also, the hyperlinks on coverages under Product column in Top 5 Coverages by Revenue and Top 5 Coverages by Contract Count widgets have been removed.

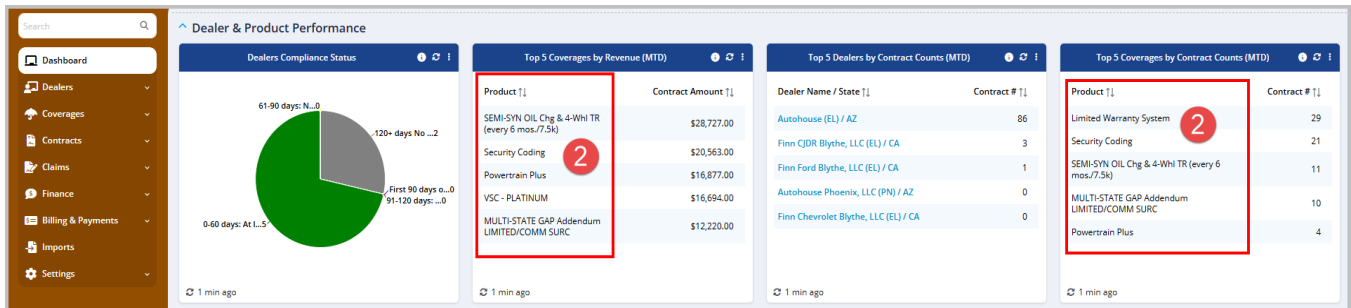
How to view this change:



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1. **Log in with Dealer or Agent Credentials:** Log in to the system using valid Dealer or Agent credentials. The Agent Dashboard displays.



2. **Verify Coverage Links in Dashboard Widgets:** On the Agent Dashboard, navigate to the widgets **Top 5 Coverages by Revenue** and **Top 5 Coverages by Contract Count**. The hyperlinks under the Product column have been removed, and coverage names now appear as plain text.
3. **Navigate to Coverages Page:** Click the **Coverages > Coverages** option from the main navigation menu. The Coverages page displays.

Brand	Product Type	Report Group	Code	SKU Code	Name
Pinnacle	Limited Warranty		PNC - LTW - WS - UNL	WSUX	Pinnacle Windshield Unlimited Limited Warranty
Pinnacle	Limited Warranty		PNC - LTW - WS	WSDX	Pinnacle Windshield Limited Warranty
Pinnacle	Etch		PNC - ETH - VTR	VTRX	Pinnacle VTR \$25,000 Benefit

4. **Confirm Hyperlink Removal:** Under the Code and Name columns, verify that all coverage names and coverage codes are now displayed as non-clickable text. The hyperlinks to individual coverage detail pages have been successfully removed for Dealer and Agent roles

1.2.7 Update Contact Email and Message on Dealer Onboarding Success Page

This update corrects the contact information displayed on the **Dealer Onboarding Wizard** success page.

Previously, the success page showed a **claims department email address**, which could cause confusion for users needing onboarding assistance. The contact details have been updated as follows:

- **Correct Email:** onboarding@ascentadmin.com
- **Revised Message:** "Please reach out to our Onboarding Department if you have any questions or would like to make changes to your request."

How to view this change:

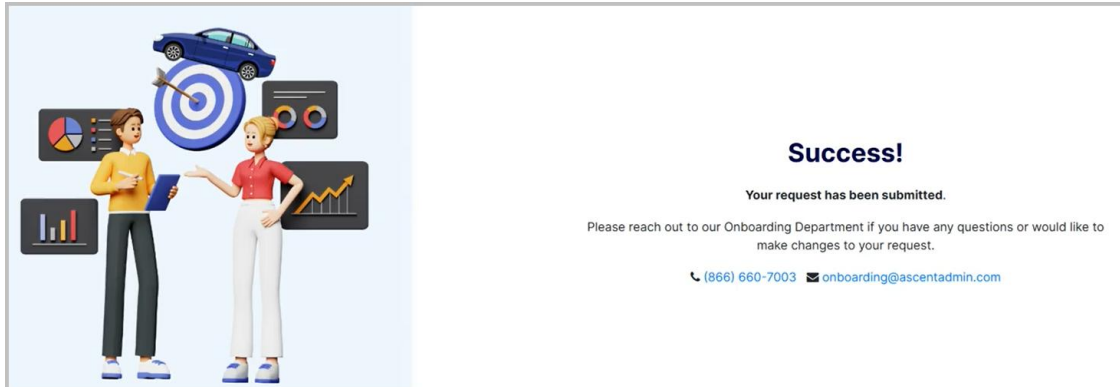
1. Open the Dealer onboarding wizard portal.



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2. Go through the various steps and provide relevant information for dealer creation.
3. After you submit the details and click the Confirm button the dealer gets created and the below message displays.



1.2.8 Dealer Onboarding: DBA name and TIN verification stage

This update introduces several improvements to the **Dealer Onboarding Wizard**, **Dealer Validation Workflow**, and **Dealer Profile** screens to support accurate legal identification, compliance, and easier searching.

1. Updates in Dealer Onboarding Wizard

- **Business Name** field has been renamed to **“Doing Business As (DBA) Name”** (*optional*)
- A new **Legal Name** field has been added
- A new **TIN/EIN Number** field has been added (*optional*)
- If either **DBA Name** or **TIN/EIN** is entered, the system will automatically tag the record as **“Pending IRS Validation”**

2. Dealer Onboarding Kanban Workflow Update

- A new workflow stage **“TIN Match Verification Stage”** has been added
- When the dealer progresses from **TIN Match Verification** to **Review**, the system will automatically:
 - Record and auto populate the **Verified Date**
 - Record and auto populate the **Verified By** details

3. Updates in Dealer Edit Profile Page

- **Name** field has been renamed to **“Doing Business As (DBA) Name”**
- **Alt Name** field has been renamed to **“Legal Name”**

4. Search Enhancements

Users can now search dealers and payees using:

- **DBA Name**



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- Legal Name

How to view this change:

1. **Access the Dealer Onboarding Wizard:** Open the provided onboarding link in the browser:
https://beta.portal.do.sdsaz.us/dealer_wizard?lang=en&ws=52AC8EA1-0FCA-2113-E769-E90DDD17D4F5

The dealer onboarding portal opens.

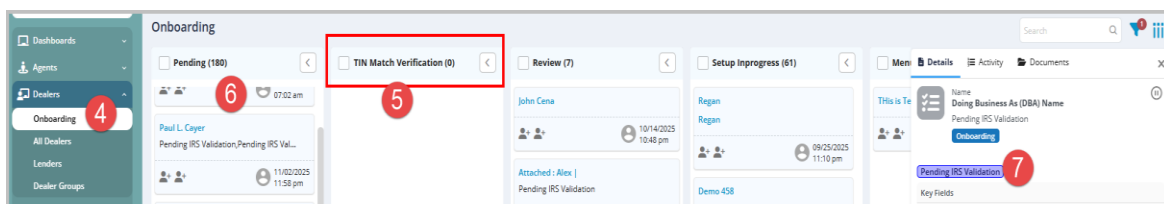
2. **Verify Updated Field Labels:**

- A new **Legal Name** field is now available
- The **Business Name** field has been renamed to “**Doing Business As (DBA) Name**” (*optional*)
- A new **TIN/EIN Number** field is available (*optional*)

3. **Complete Onboarding Steps:** Continue through the onboarding wizard and complete all steps to successfully create a new dealer.

4. **View Onboarding Kanban Workflow:** Click **Dealers > Onboarding** option.

The **Onboarding Kanban** view opens.



5. **Verify New Workflow Stage:** In the Kanban board, confirm that the “**TIN Match Verification Stage**” has been added.

- This stage appears **after Pending** and **before Review**

6. **Select the Dealer Record:** Click the newly onboarded dealer entity.

The **Details** tab displays on the right side.

7. **Check IRS Validation Tag:** If either **DBA Name** or **TIN/EIN** was entered, the system automatically tags the dealer as “**Pending IRS Validation.**”

8. **Navigate to All Dealers:** Click **Dealers > All Dealers**.

The **All Dealers** screen displays.



User Guide



Status	Dealer Number	Doing Business As (DBA) Name
Active	14069	Diversified Insurance
Active	DL0000000002	BMW Dealer
Active	DL0000000003	MBZ Dealer

9. **Open Dealer Profile:** Select the specific dealer from the list.
The dealer profile opens.
10. **Verify Updated Field Names:** Under the **Details** tab, below changes can be seen:
 - **Name** field now displays as “**Doing Business As (DBA) Name**”
 - **Alt Name** field now displays as “**Legal Name**”

Details | Servicer | Settings | Dealer Menu | Commission | Coverages | No Charge B

Dealer Profile

Status *
Active

Termination Date

Doing Business As (DBA) Name *
BMW Dealer

Main Agent *
AG0000000016 | 18Sep

Reference Number
12345456789

Legal Name
BMW BG

11. **Search Enhancements:** In the search bar, users can now search dealers and payees using:
 - DBA Name
 - Legal Name

1.2.9 Send Document for E-Sign – Email Entry and Validation Enhancement

This enhancement improves the **Send Document for E-Sign** workflow under the **Dealer Details** page by displaying the dealer’s email automatically in the Email field of popup window. If the email is missing, then you can manually add a new email id.

With this update, the system now captures missing email on the fly and ensures a smoother sending process. The entered email is **automatically saved** to the dealer’s profile and used for sending the e-signature request.

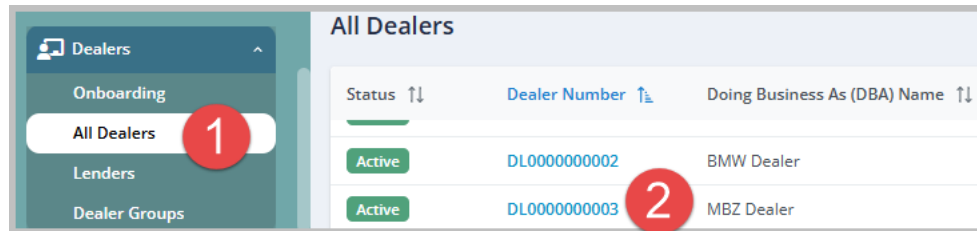
How to access this feature:



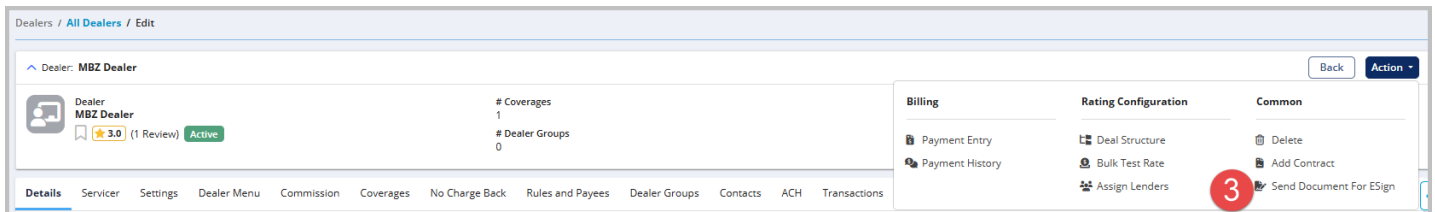
User Guide



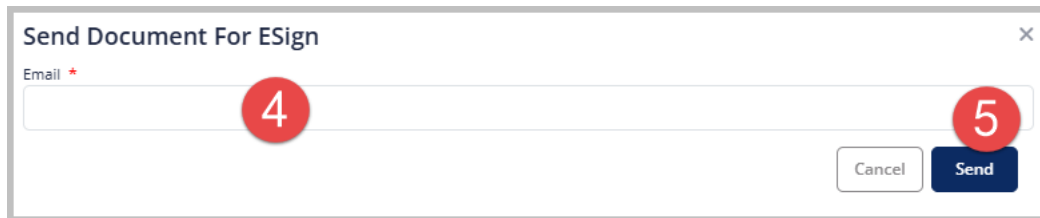
1. **Navigate to Dealer List:** Click **Dealers > All Dealers** from the main navigation menu. The **All Dealers** screen displays.



2. **Open Dealer Profile:** Select the specific dealer from the list. The **Dealer Details** page opens.



3. **Open Send for E-Sign Popup:** Click **Actions > Send Document for E-Sign**. A **Send for E-Sign** popup window displays.



4. **Enter Email Address:**
 - If the dealer already has an email saved, it appears automatically in the popup.
 - If no email is available, enter a new email address in the provided field. The new email gets saved to the dealer's profile automatically.
5. **Send the Email:** Click the **Send** button. A success confirmation message displays, indicating that the e-signature request email has been sent successfully.

1.2.10 Dealer Onboarding Workflow Updates

Now, the dealer onboarding workflow has been made meaningful and user-friendly. The workflow has been updated as follows:

- The system now displays the **source** of each onboarding request:
 - **"Portal"** – for dealers onboarded through the portal.
 - **"Email"** – for dealers onboarded through email submissions.

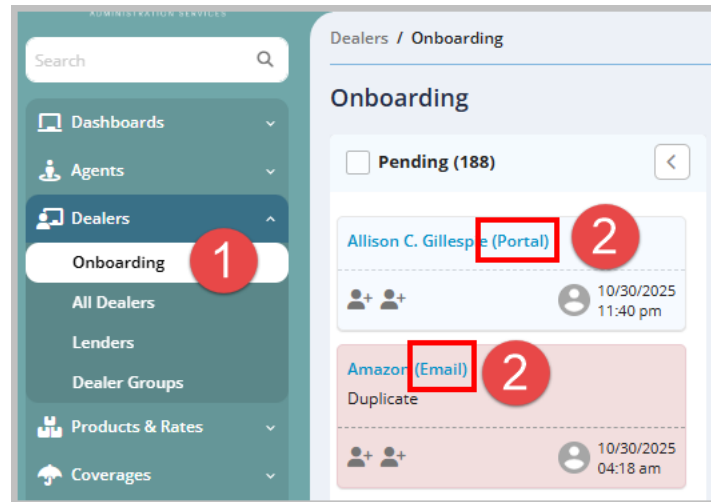


User Guide

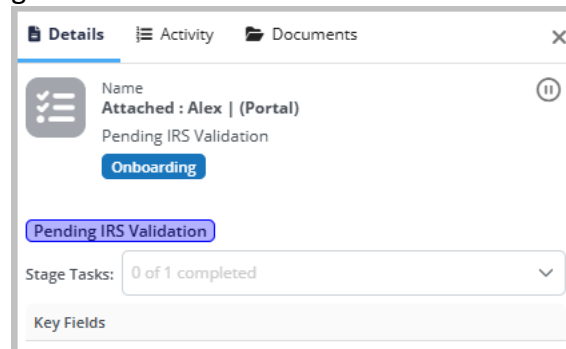


How to access this feature:

1. **Navigate to Dealer Onboarding:** Click **Dealers > Onboarding** from the main navigation menu. The **Onboarding** screen displays.



2. **View Source Information on Dealer Cards:** Each onboarding request card now displays the source of the request next to the dealer name:
 - **Portal** – for dealers onboarded through the portal.
 - **Email** – for dealers onboarded through email submissions.
3. **Open Dealer Details:** Select the specific dealer card. The **Details** tab displays on the right side of the screen.



1.2.11 Dealer onboarding summary details

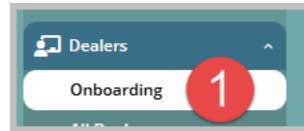
Previously, From Step 4 (Set up in Progress) users did not have direct access to the information submitted thru portal. However, with this enhancement, now user can view and validate all information captured during the dealer onboarding process from any step of the Kanban workflow. From Step 4 (Setup In Progress), if the dealer profile has been created, then now user have view-only access (read only) to the onboarding portal.

How to access this feature:

1. **Navigate to Dealer Onboarding:** Click **Dealers > Onboarding** from the main navigation menu.

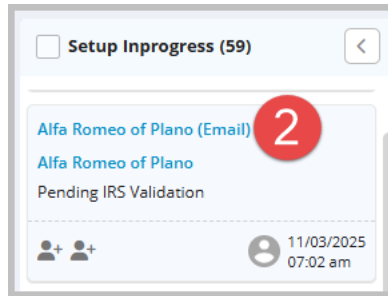


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The **Dealer Onboarding** screen displays.

2. **Access the Dealer Wizard in Read-Only Mode:** Select a dealer entity listed under the **Setup In Progress** stage, where the dealer profile has been created.



The **Dealer Wizard** opens in **read-only mode**, allowing you to review the onboarding details.

The screenshot shows the 'Dealer Wizard v2.0' interface. On the left is a dark blue sidebar with a list of steps: Dealer Information (selected), Remittance Contact, Top Lenders, Menu And DMS Configuration, Agent Commission, Dealer Commission, and Login Setup. The main area is titled 'Dealer Information' and contains the following fields and options:

- Doing Business As (DBA) Name ***: Alfa Romeo of Plano and Mentos 54645645646
- Legal Name ***: (empty)
- Phone ***: +1 (###) ###-####
- TIN/EIN Number**: (empty)
- Address ***: (empty)
- City ***: (empty)
- State ***: Select State (dropdown menu)
- Zip Code ***: (empty)
- Dealer Type**: ☐ Franchise, ☐ Independent
- Brand**: ☐ Ampli-Fi, ☐ APEX, ☐ Ascension, ☐ Elevate, ☐ Pinnacle

1.3 Agents

1.3.1 [ABPT-4] Date Range Filter removed from Agent Dashboard

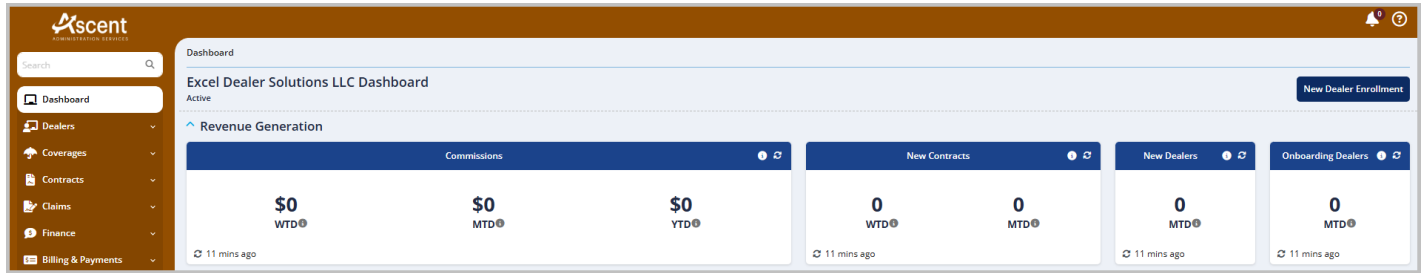
This update removes the “Date Range” filter from the Agent Dashboard to prevent confusion and ensure consistency in dashboard functionality.

How to View This Change:

1. **Log in with Agent Credentials:** Log in to the system using valid **Agent** credentials. The **Agent Dashboard** displays.



User Guide



- Verify Dashboard Filters:** On the top-right corner of the dashboard, confirm that the **Date Range** filter has been **removed**.

The dashboard now displays data without any manual date range selection option.

1.3.2 All Agents Listing Page Updates

To improve usability of the **All Agents** screen, the list view has been updated to support more practical and commonly used search criteria.

Enhancement Details:

- Contact First Name** and **Contact Last Name** columns are now displayed in the All Agents list. These fields are **searchable and filterable**, allowing users to quickly locate agent profiles.
- Mailing Address** and **Mailing City** have been removed from the grid.
- Mailing State** remains, as it is still useful for filtering agents by location.

How to view this change:

- Click the **Agents > All Agents** option.

The All Agents screen displays.

The screenshot shows the 'All Agents' screen with a table listing agents. A red box highlights the new columns: Contact First Name, Contact Last Name, and Mailing State.

Status	Agent Number	Name	Contact First Name	Contact Last Name	Mailing State
Active	AG10000212	AUTO VSC, LLC	DAVID	WRIGHT	California
Active	AG10000213	SMC SERVICES LLC	SHAWN	CLONEY	Nevada

1.4 Coverages

1.4.1 Roadside Assistance Option in Coverages

A new **Roadside Assistance** option has been added under the **Details** tab in the **Coverage** module. This enhancement allows you to flag whether a specific coverage includes Roadside Assistance.

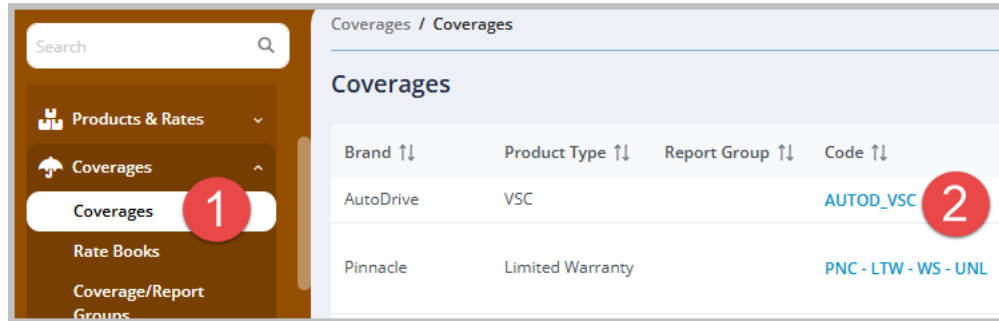
How to access this feature:

- Click the **Coverages > Coverages** option.

The Coverages screen displays.

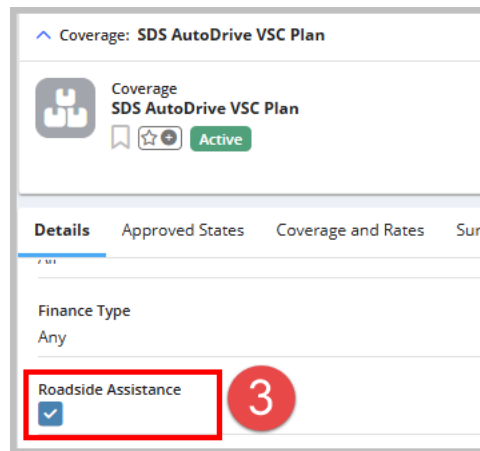


User Guide



2. Select the specific coverage.

The coverage details page opens.



3. **Roadside Assistance** option: The **Roadside Assistance** option is now available under the Details tab.

1.5 Rules

1.5.1 Clone Rule Feature under Rules Engine

A new **Clone Rule** feature has been added to the Rule Engine to help users quickly duplicate existing rule configurations without rebuilding them manually.

When a user selects **Clone Rule** from the **Actions** menu, the system prompts for a unique Rule Identifier.

After entering the identifier, the system creates a new Rule Code that inherits all settings from the original rule. The cloned rule can then be edited and maintained independently.

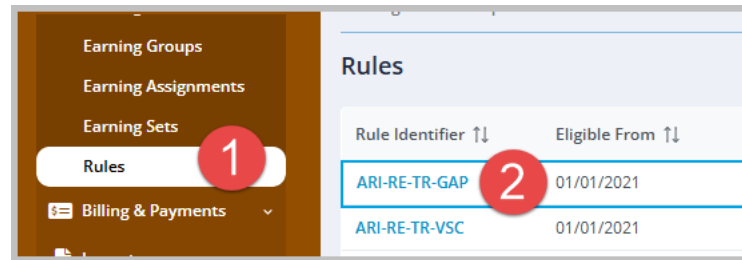
How to access this feature:

1. **Navigate to the Rules Page:** Click **Risk Mgmt & Participation > Rules** from the main navigation menu.

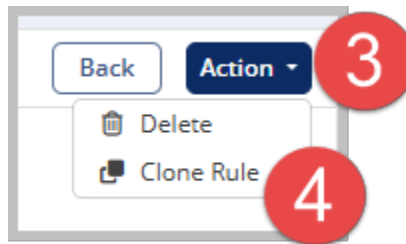
The **Rules** screen displays.



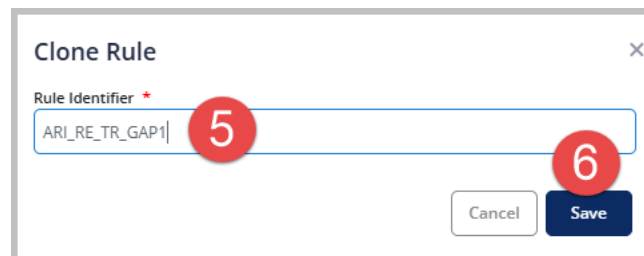
User Guide



2. **Select the Rule to Clone:** Click the specific **Rule Identifier** you want to replicate. The rule opens.
3. **Open the Actions Menu:** Click the **Actions** menu in the top-right corner.



4. **Choose Clone Rule:** Click the **Clone Rule** option. The **Clone Rule** pop-up window displays.



5. **Enter a New Rule Identifier:** In the **Rule Identifier** text box, enter a **unique identifier** for the new rule.
6. **Save the New Rule:** Click the **Save** button. A cloned rule is created with the same configuration as the original and can now be edited independently.

1.6 Payees

1.6.1 Configure Payee Changes for Agents and Dealers

To enhance payee configuration flexibility for both Dealers and Agents, new selection options are now available when setting up payees.

Enhancement Details

- A **Brand & Product Type** dropdown has been added, allowing users to specify which Brand–Product combination the payee applies to.



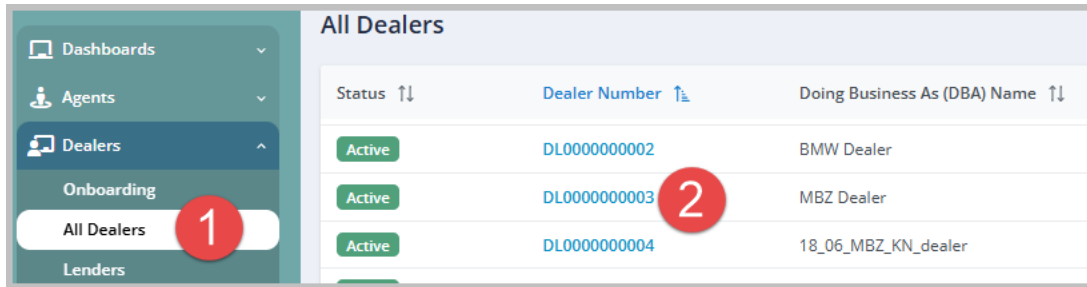
User Guide



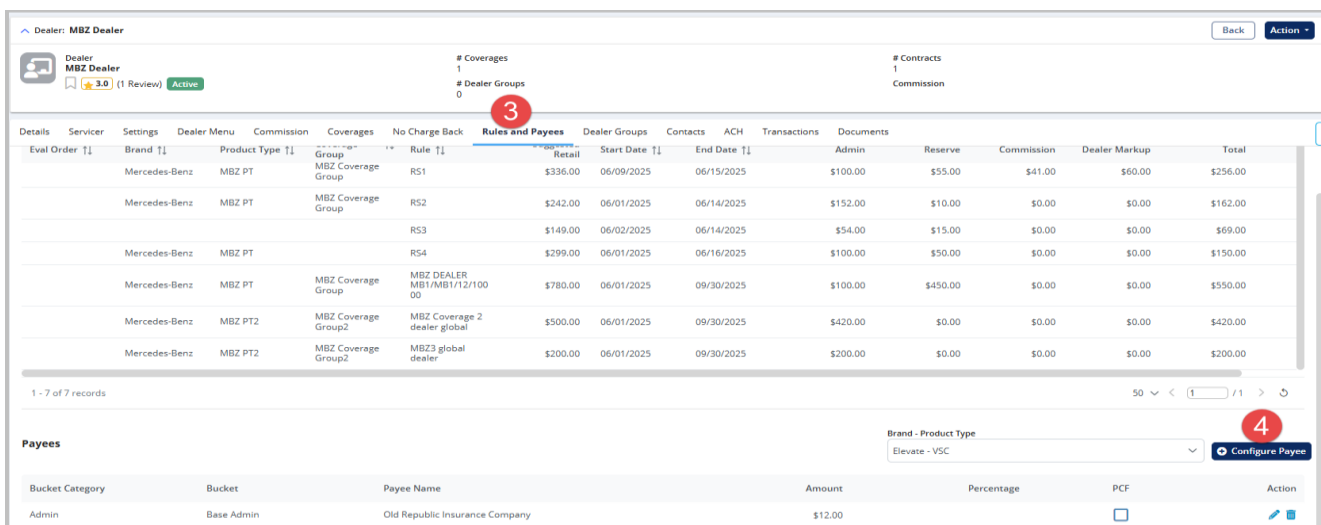
- A **Coverage Group** dropdown has been added (optional), enabling users to narrow payee configuration by coverage category.
- You can now enter **remaining amounts** or **percentage values** when allocating funds to payees, ensuring allocations are precise and controlled.

How to access this feature:

1. **Navigate to Dealer Profile:** Click **Dealers > All Dealers** from the main navigation menu. The All Dealers screen displays.



2. **Open specific dealer:** Click the specific dealer from the list. The dealer profile screen displays.



3. **Open Rules and Payees:** Click the **Rules and Payees** tab.
4. **Open Payee Configuration:** Click the **Configure Payee** tab. The Add Payee window displays.



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The screenshot shows the 'Add Payee' form with the following fields and options:

- Brand ***: Elevate (highlighted with a red circle with the number 5)
- Product Type ***: VSC (highlighted with a red circle with the number 5)
- Coverage Group**: Select Coverage Group (highlighted with a red circle with the number 5)
- Bucket Category ***: Select Bucket Category
- Bucket ***: Select Bucket
- Payee ***: Select Payee
- Payee Type ***: Amount (selected), Percentage
- Amount ***: \$0.00
- ☐ PCF-Prior Cancellation Fees are assumed by this payee
- Note: PCF will apply to all payees in this bucket
- Buttons: Cancel, Save

5. New Configuration Options:

- A **Brand & Product Type** dropdown is now available to select the applicable Brand–Product combination for the payee.
- A **Coverage Group** dropdown is provided (optional) to further classify the payee by coverage grouping.

6. Coverage Group Filter: The Coverage Group filter is displayed next to the Brand & Product Type under the Payee Section.

1.7 Generic

1.7.1 Updated NACHA File Naming and SFTP Submission Requirements

This enhancement ensures that NACHA files are generated and submitted to SFTP in the correct naming format for processing and validation.

- All NACHA file names must **begin with**: AC731L27
- A **date and timestamp** must follow the prefix, using the format: AC731L27.MMDDYYYY.HHMMSS

The new naming format has been implemented successfully. Both required file versions are now uploaded to SFTP, and test file validation has passed successfully.

1.7.2 New Accounts Payable and Accounts Receivable Section

To improve clarity and navigation within the Payments section, the Payments module has now been separated into two distinct modules:



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- **Accounts Receivables** – Incoming payments collected from Dealers, Agents, or other payers.
- **Accounts Payables** – Outgoing payments issued to payees such as Dealers, Agents, Administrators, or other entities.
- New columns have been added to both modules:
 - **Payment Category**
 - **Register #**
- A **Payer** filter is now available on both screens so that you can quickly search and narrow results based on the payer.

How to access this feature:

1. Click the **Finance > Account Receivable** option.

The Account Receivable screen displays.

Status	Payee Name	Payer Name	Payment Category	Contract #	Claim #	Register #	Transaction Type	Transaction Date
Payment In Process	Old Republic Insurance Company	Calculation Dealer1	Contract Remittance			R20251105-00004	Credit	11/05/2025
Ready for Payment	Ascent Administration Services	Calculation Dealer1	Contract Remittance			R20251105-00003	Credit	11/05/2025
Ready for Payment	Old Republic Insurance Company	Calculation Dealer1	Contract Remittance			R20251105-00001	Credit	11/05/2025
Pending	Old Republic Insurance Company	Calculation Dealer1	Contract Remittance			R20251031-00003	Credit	10/31/2025
Payment In Process	Ascent	Calculation	Contract			R20251031-	Credit	10/31/2025

2. Click the **Finance > Account Payable** option.

The Account Payable screen displays.

Status	Payee Name	Payer Name	Payment Category	Contract #	Claim #	Register #	Transaction Type	Transaction Date
Pending	Ascent Reinsurance Inc.	Ascent Administration Services	Contact Commission	CALCPT251046104201			Debit	11/03/2025
Pending	00-Ascent Administration Services	Ascent Administration Services	Contact Commission	CALCPT2510D08313			Debit	11/03/2025
Pending	Old Republic Insurance Company	Ascent Administration Services	Contact Commission	CALCPT2510010208			Debit	11/03/2025
Pending	Ascent Reinsurance Inc.	Ascent Administration Services	Contact Commission	CALCPT2510010208			Debit	10/30/2025

1.7.3 Register Preview and Display Improvements in Remittance Register History Section

A register preview is now available prior to executing the Pay All action, allowing you to review payment details before processing. The Amount column now displays values for all processed registers. If a register amount is



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zero, the system will show \$0.00 for clarity. The text color for “Voided” registers has been updated to ensure proper visibility in light mode.

Payment

#

Recipient

Transactions

Contracts

2 | \$2329.00

Payment Method Information

ACH

Change

Pay All

Close

1	Ascent Administration Services		
ADVSC2511002607	\$2060.00	11/06/2025	Jessica Lery

Register Payment History									
Payer				Product Type					
DL00000409 - Autohouse (EL)				All					
Register Number	Status	Created Date	Payee Name	Product Type	Payer Name	Payer #	Check #	Ref #	Amount
R20251106-00002	Pending	11/06/2025	Ascent Administration Services	PPM	Autohouse (EL)	DL00000409			\$1809.00
R20251106-00001	Pending	11/06/2025	Ascent Administration Services	LTW	Autohouse (EL)	DL00000409			\$1960.00
R20251105-00001	Paid	11/05/2025	Ascent Administration Services	VSC	Autohouse (EL)	DL00000409			\$2225.00
R20251030-00005	Paid	10/30/2025	Ascent Administration Services	VSC	Autohouse (EL)	DL00000409			\$2060.00
R20251030-00003	Paid	10/30/2025	Ascent Administration Services	GAP	Autohouse (EL)	DL00000409			\$0.00
R20251030-00002	Voided	10/30/2025	Ascent Administration Services	GAP	Autohouse (EL)	DL00000409			\$3885.00
R20251030-00001	Paid	10/30/2025	Ascent Administration Services	VSC	Autohouse (EL)	DL00000409			\$2203.00
R20251027-00005	Pending	10/27/2025	Ascent Administration Services	GAP, VSC	Autohouse (EL)	DL00000409			\$2850.00
R20251027-00004	Paid	10/27/2025	Ascent Administration Services	VSC	Autohouse (EL)	DL00000409			\$2801.10

1.7.4 [ABPT-38] Select All Label in Remittance Register

The Select All label is given to option making it easy to select all the contracts under Remittance Register.

How to access this feature:

1. Click the **Finance > Remittance Register** option. The Remittance Register screen displays.
2. Select the desired payer from the **Payer** drop down menu. The Contracts displays with Select All label.

Vehicles

Finance

Payees

Remittance Register

Register Payment History

Process Admin Fees

Process Reserve Fees

Remittance Register

Contracts 6

Select All

Funded

Status

☐

☐

☐

Pending

Pending

Pending