
NAE NWAN CONNECT MOBILE APP USER GUIDE

AGENT & DEALER

PEOPLE. PRODUCTS. PERFORMANCE.
THE WAY IT SHOULD BE.®



AGENT & DEALER USER GUIDE



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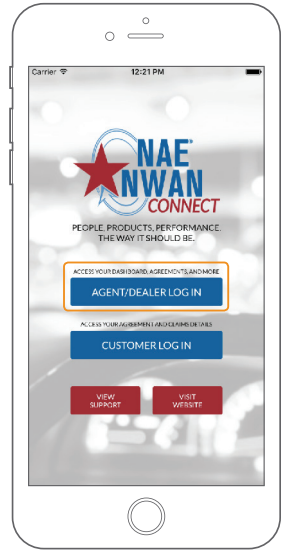
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LOGIN

From the Login screen you can enter your credentials to login as a Customer or an Agent / Dealer.

This guide will cover the Agent / Dealer portion of the NAE NWAN CONNECT app.

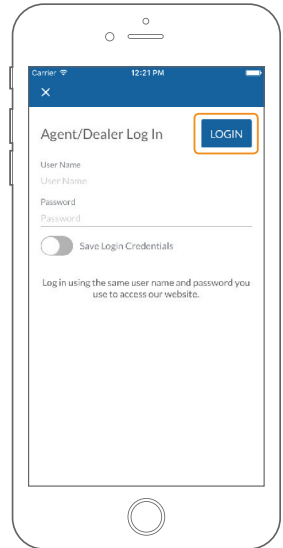


AGENT/DEALER

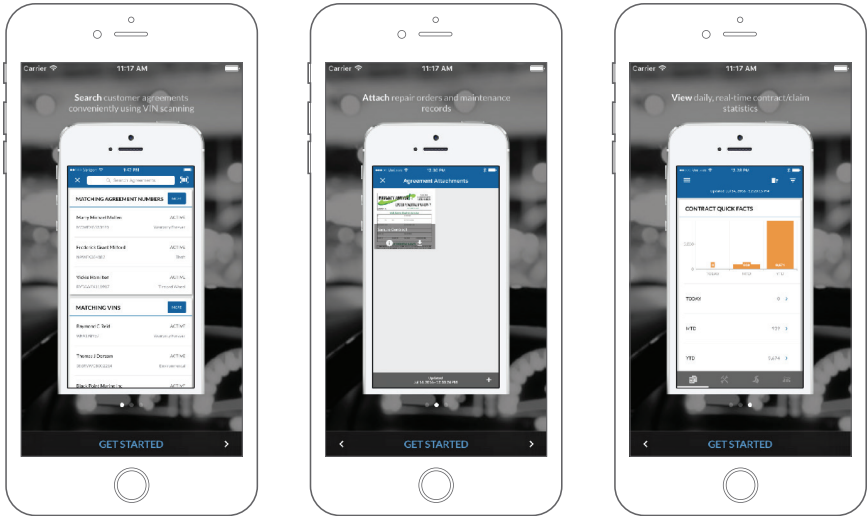
After selecting the Log in now button you will be presented with the Agent / Dealer login screen. Here you are able to enter your User Name and Password.

☆ You will use the same username and password to login here, as you do with the OAMS website.

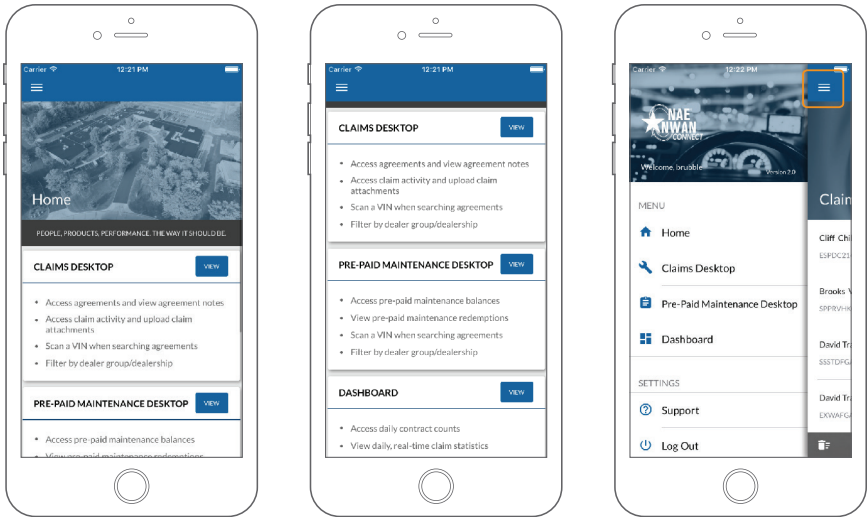
You also have the option to have your login and password automatically entered at your next login by toggling the Save Login Credentials toggle.



If this is your initial login to the application, you will be greeted with a few slides describing some of the features contained within. Swiping will progress you through the slides and selecting the GET STARTED button will continue past the slides to the application's home screen.



After logging in successfully, you will be brought to the home screen where you may select to navigate to the Claims Desktop, Pre-Paid Maintenance Desktop, or Dashboard. We will cover each of these options in further detail in later sections.

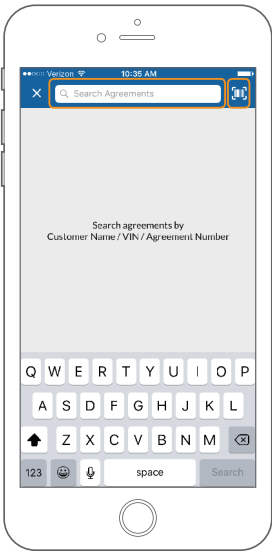
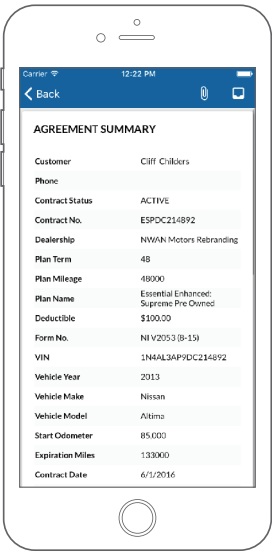
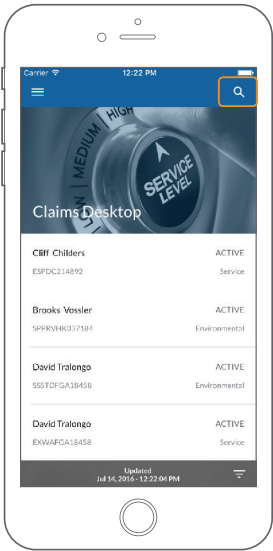


If you do not have access to Claims Desktop, PPM Desktop, or the Dashboard, and attempt to navigate to one of these screens; then you will receive a pop-up advising you to contact us for access.

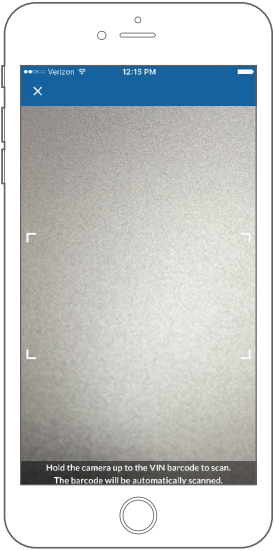
CLAIMS DESKTOP

Selecting Claims from the main menu will bring you to the Claims Desktop portion of the app.

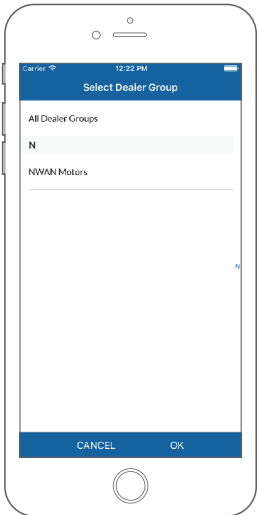
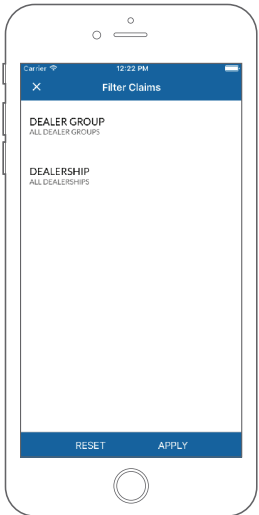
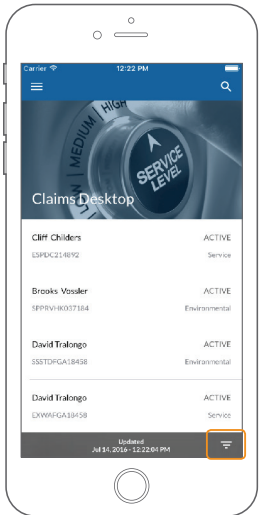
You will be able to view the same information from the website's Claims Desktop screen. If you are an Agent, you will see the last 20 claims for all of your stores (with the most recent at the top). If you are a dealer, you will see the last 20 claims from your dealership/dealer group. From this screen you can select an agreement to view more details and claim history or you can search for a specific agreement by Customer Name, VIN, or Agreement Number.



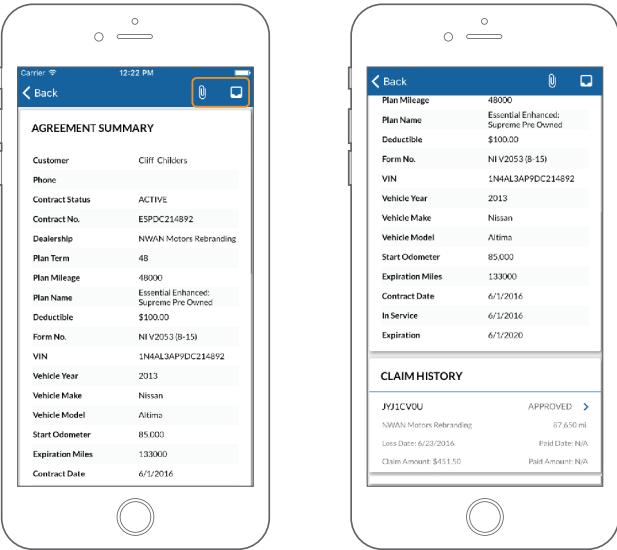
Also, selecting the barcode scanner icon on the top right-hand portion of the screen will bring up a VIN Barcode Scanner that will automatically attempt to read a VIN barcode. If you have not granted the application access to the device's camera you will need to do so before the VIN Scanner will work. How to enable the application to access your camera is covered in further detail at the end of this section.



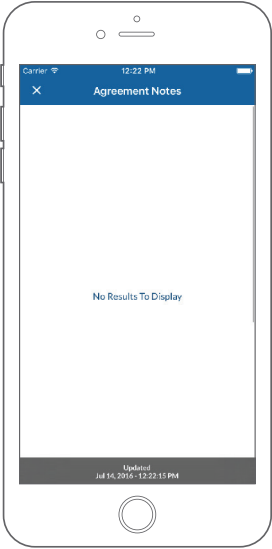
By selecting the filter icon at the bottom right of the screen, you will be brought to the Claims Filter screen. If you have agent level access, all of your dealerships will display on this screen. If you are a dealership level user, only your specific store, or each store in your dealer group will display depending on your level of access.



Selecting an agreement will bring you to the Agreement Summary and Claim History screen, where you can view details in regards to the Customer, Plan, Vehicle, and Contract. When viewing the claim history for an agreement, you can select an individual claim to view its details. You can attach an image to the claim by selecting the paper clip icon at the top right of this screen.

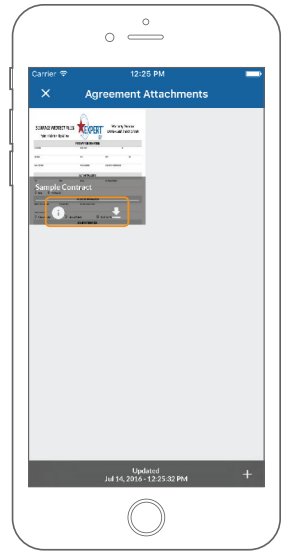


You can also view an agreement's notes by simply selecting the agreement note icon.



Selecting the paper clip icon will bring you to the Agreement Attachments screen. Any attachments to the agreement will display here. You can also upload a new attachment by selecting the plus icon on the bottom right of the screen. Selecting the “i” icon will display information about the attachment and the download icon will download the attachment to your device. Selecting an attachment will display the attached file if the device is able to do so.

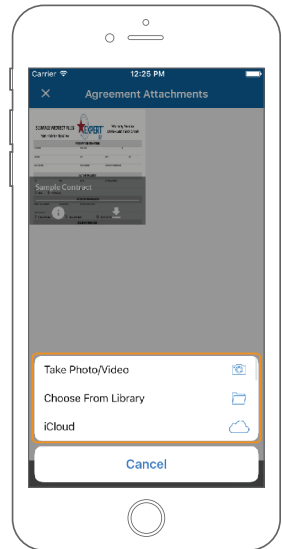
☆ The sample contract will display by default in the attachment section for all agreements. Agency level users are not able to attach files to an agreement; this functionality is limited to dealer/agent level users. Customers are not able to view or access dealer attachments, however, dealership and agent users can view any file that has been attached by a customer.



After selecting the add new attachment icon from the Agreement Attachments screen a pop-up on the lower portion of the screen will display. You will be given the options to Take a Photo, Choose from Library, or iCloud Drive. You can also access files from any document management app such as Google Drive or Dropbox.

There is no file size limit on what can be uploaded using the app. You can upload any file type but, your device will need to be able to display it if you wish to view it.

☆ Be aware that this may require the use of cellular data and a larger file will take more time to upload.



If you desire to take a photo to upload as an attachment, you will need to make sure that the application has access to your camera. You can do this by navigating to the NAE/NWAN CONNECT application settings. From the main screen of your device, select Settings.

On the Settings screen you will need to scroll down the page until you find the NAE/NWAN CONNECT application.

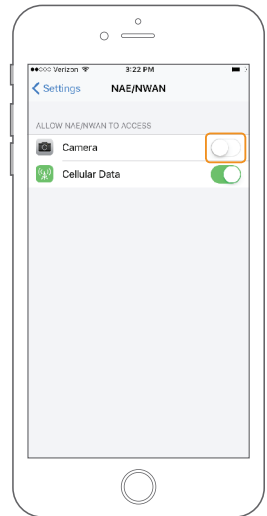
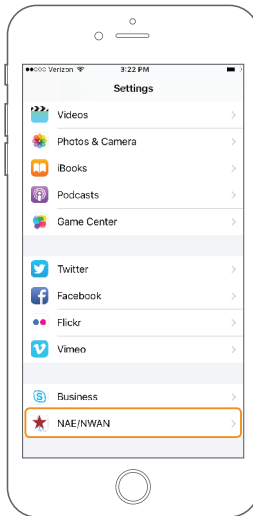
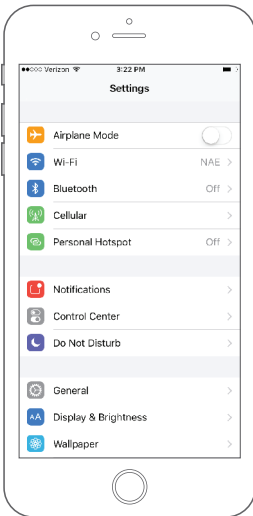
Select the NAE/NWAN CONNECT application icon from the list.

You are presented with the settings for the application. If the Camera toggle appears to be off, the application won't allow you to take a photo to upload as an attachment.

Enable the toggle for Camera and the application can now access your device's camera.



☆ Again, be aware that this application may use cellular data while the “Cellular Data” option is enabled.



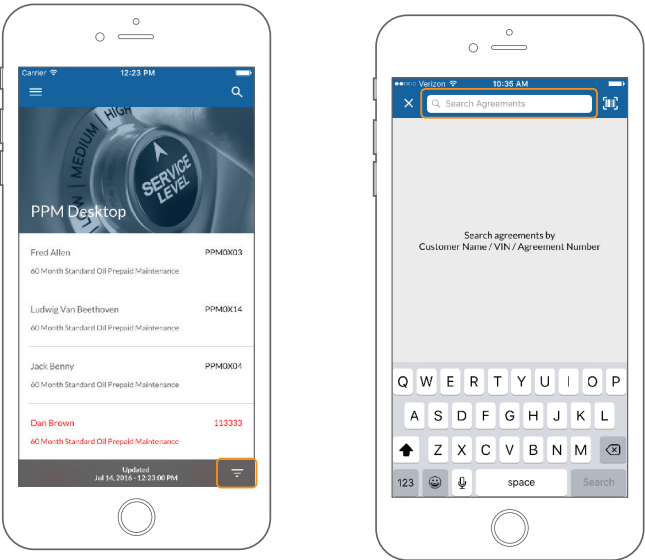
PRE-PAID MAINTENANCE

Selecting the Pre-Paid Maintenance link from the main menu will bring you to the main Pre-Paid Maintenance screen.

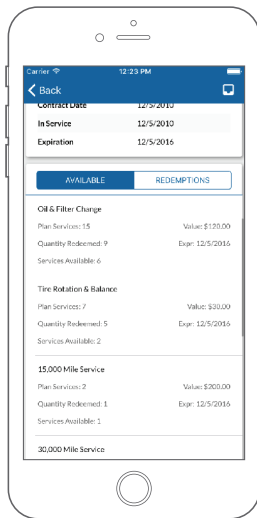
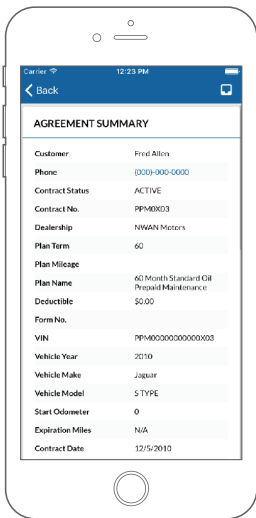
☆ Red font indicates recent activity, gray font indicates an expired agreement, and strike-through font indicates a canceled agreement. Black font is the default.

Any PPM agreements that you would see in OAMS on the Prepaid Maintenance screen will display here. On this screen you can add filters to sort by dealer group or dealership by selecting the filter icon on the bottom right corner of the screen.

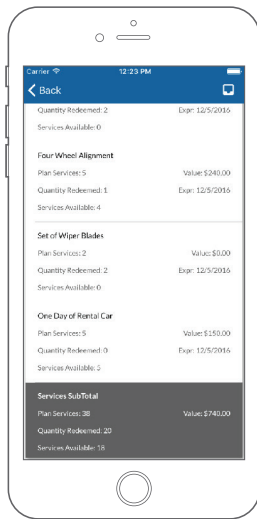
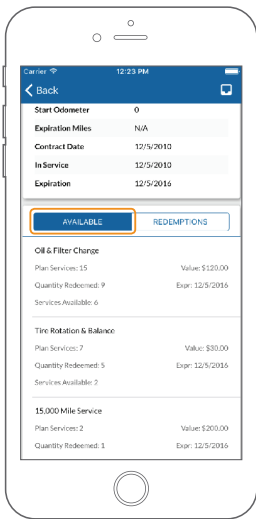
From the main Pre-Paid Maintenance screen, you can select a contract or search by Customer, Agreement, or VIN.



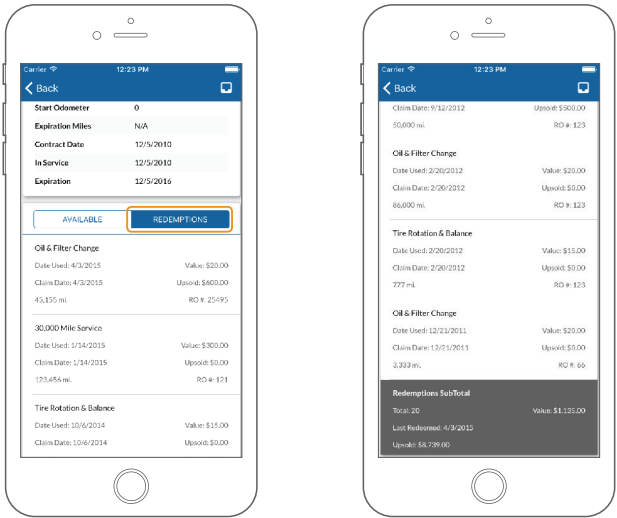
Selecting one of the PPM agreements from the list will take you to the PPM Agreement Summary Screen. This screen will contain information on the Customer, Contract, Vehicle, and Plan. The list of available services or a history of redemptions can be seen by selecting which you would like to view at the top of the screen.



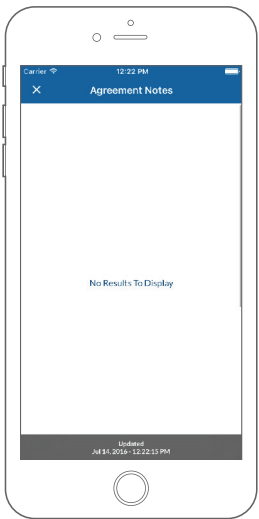
Scrolling down on the PPM History screen will display the available services details. Each service will display the Plan Services, Quantity Redeemed, Remaining Services Available, Value, and Expiration Date.



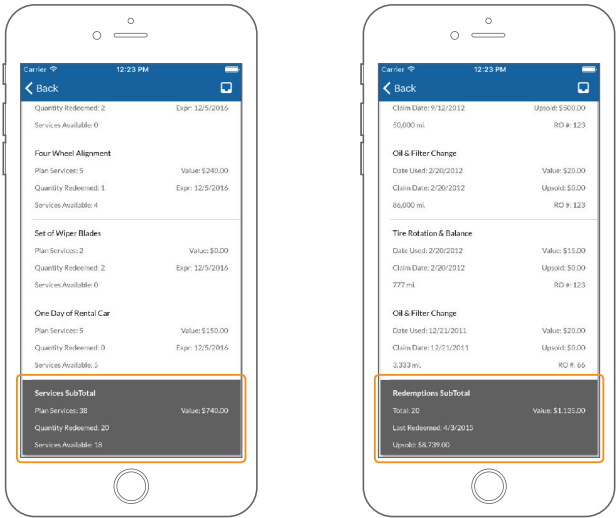
If you have the “Redemptions” option selected, you will see the redemption history details of the service, Date Used, Claim Date, Mileage, Value, Upsold Value, and RO Number.



Selecting the agreement notes icon at the top right-hand corner of the screen will take you to the agreement notes screen. If there have been any agreement notes added, they will display here.

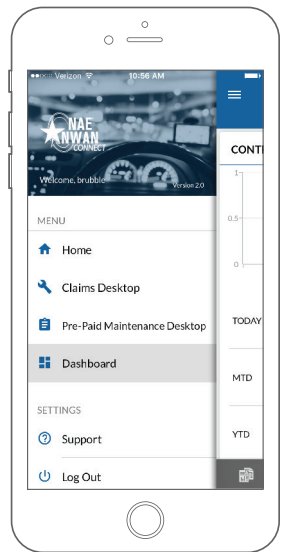


At the very bottom of the PPM History screen there will be a summary of the total Plan Services, Quantity Redeemed, Services Available, and their total Value.

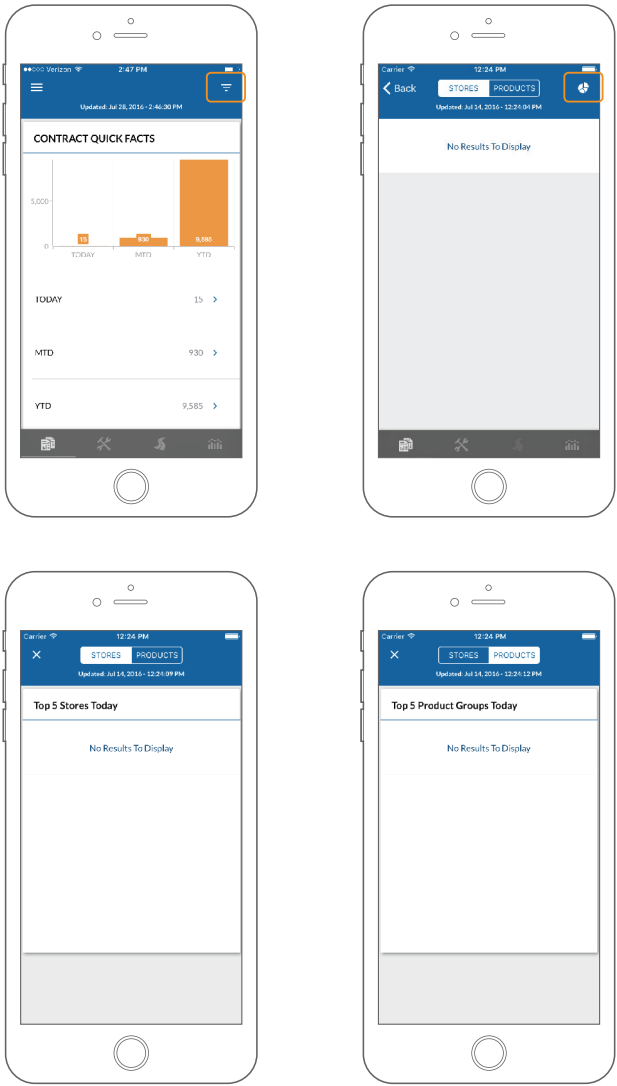


DASHBOARD

Selecting the Dashboard link from the sidebar menu will bring you to the main Dashboard screen.

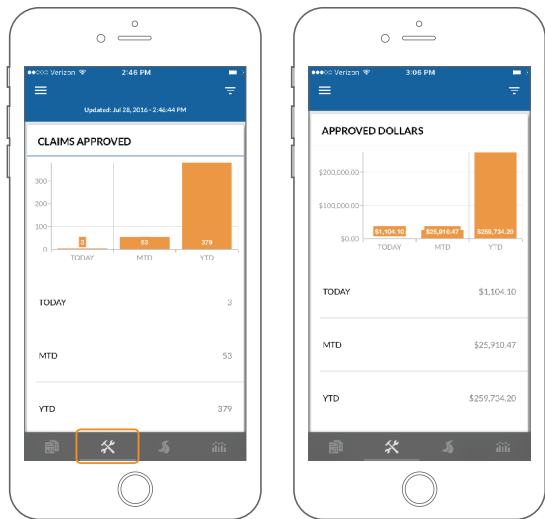


On this screen you can see quick facts about contract counts Today, Month to Date, Year to Date, and Inception to Date. You can drill down through the Contract Quick Facts into individual stores down to the product group. You can also filter by dealer group or dealership by selecting the filter icon from the top right-hand corner of the screen.



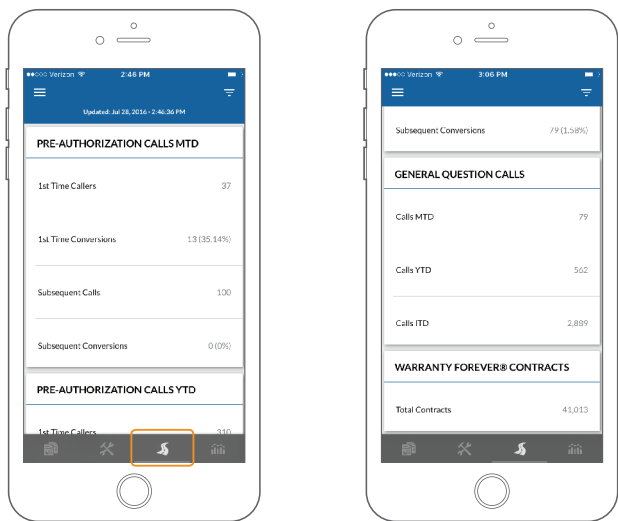
At the bottom of the screen you will notice different tabs for Contracts, Claims, Warranty Forever, and Rolling Trend. Selecting each will take you to their respective desktop screens.

On the Claims selection you will see a count of approved claims and approved dollars for Today, Month to Date, Year to Date, and Inception to Date.

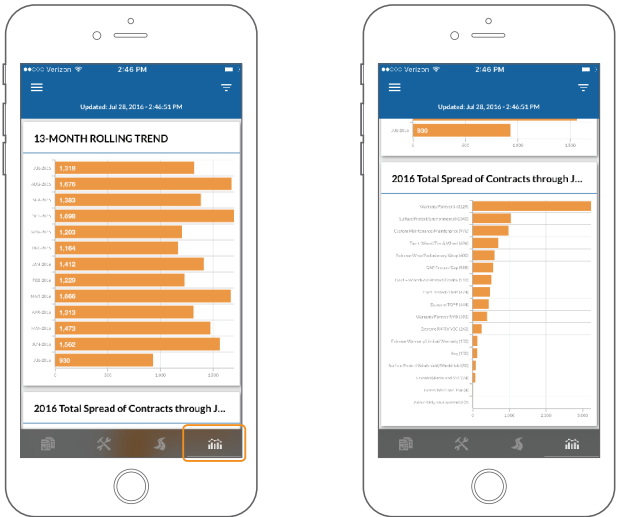


☆ The Warranty Forever® tab will only be enabled if you have sold Warranty Forever®.

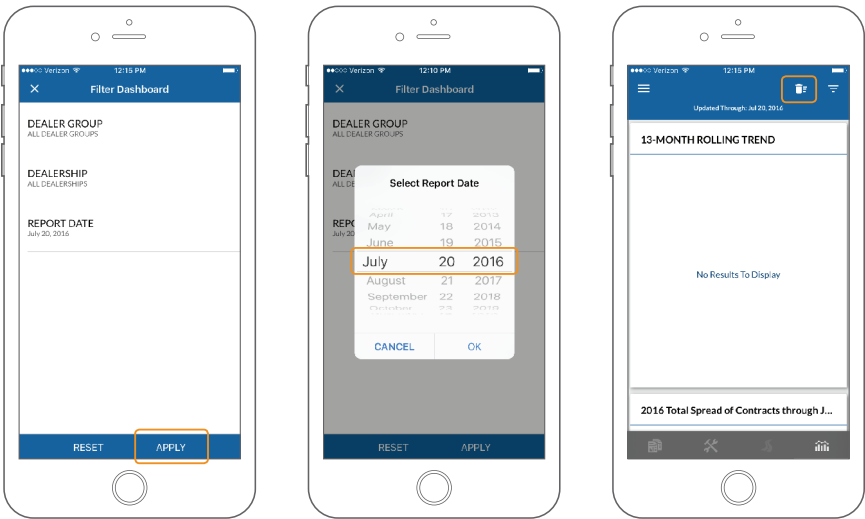
Selecting the Warranty Forever icon will display a summary of the Pre-Authorization callers and how many of those are 1st time callers, a 1st time caller conversion percentage, subsequent calls, and a subsequent call conversion percentage. This can be viewed by Month, Year, or Inception to Date. The count of general question calls can also be viewed here by Month, Year, or Inception to Date with a running total of Warranty Forever® contracts.



Selecting the Rolling Trend icon from the bottom will display a 13-month rolling trend and a total spread of contracts for the year. If you scroll down there will also be a Total Spread of Contracts.

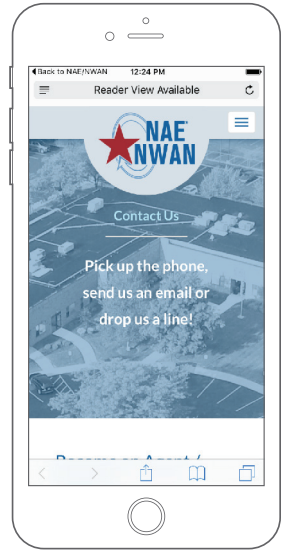


Besides being able to filter by dealer group and dealership, you can also filter the dashboard by date. This will update the results up to the date you select. After adding any filters, you can remove all filters by selecting the icon of a trash can in front of the filter icon.



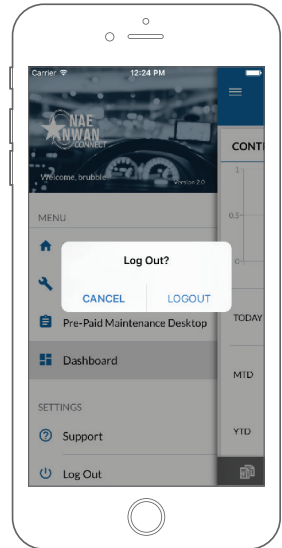
SUPPORT

The Support menu option will navigate you to the NAE/NWAN website's home page via your internet browser.



LOG OUT

Selecting Log Out will log your user account out of the application and return you to the login screen.



Our Mission

Our mission is to be a professional, passionate organization, driven to be adaptable and responsive to our partners' needs. We provide industry leading products, services and support that will assist our clients in exceeding their goals. Our continued growth is built on a foundation of innovative solutions that our partners can rely on, by experts they can trust.

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