



## Login Screen

Enter Login ID and password then click on “Submit”. The Retailer Login page will no longer require entry of a “Retailer number”.

### Retailer Login

Enables registered Retailers to log on and access the Web Finance System

Make sure **Caps Lock** is off before entering your password

\* Field must be entered

**Login ID**

**Password**

[Need Help logging in?](#)

[Forgot your Login ID or Password?](#)

[Not yet registered?](#)

Submit
Cancel

Note: The service will be unavailable on Sunday evenings from 7pm - 11:30pm, during scheduled maintenance.

Once you have logged in, the system will present you with a range of options based on your assigned role.

For most users, you will be automatically logged into your default dealer. For users that are assigned to more than one dealer you will need to select which dealer you wish to log into.




The roles are:

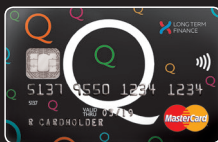
**Standard user** Able to process repeat purchases, pre-approval purchase, new applications and view the dashboard

**Administrator** Add staff, reset passwords, expire users, view staff list, and also view dashboard

**RPA (Retailer Payout Advice) user** View and export payout information

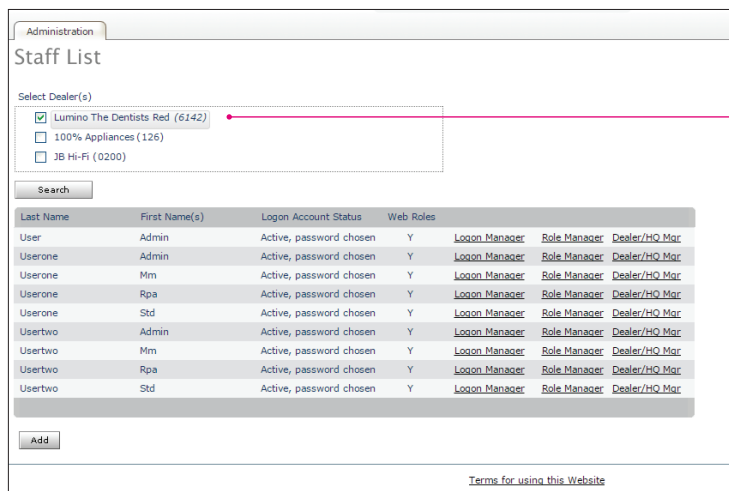
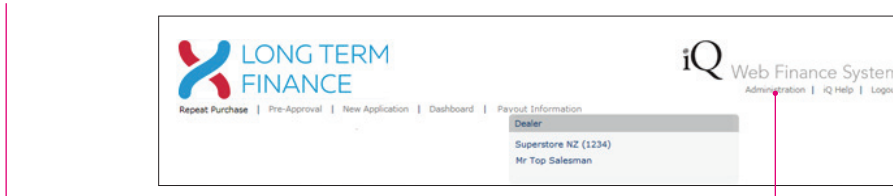
## LOGIN TO IQ

STANDARD USER	ADMINISTRATOR	RPA USER
 <b>SELECT</b> Repeat Pre-approval New Application Dashboard  Process transaction OR Select dashboard to “Continue with Sale” View contract status Replace a contract Reprint after approved option (Q MasterCard® <b>ONLY</b> on the day of processing)	 <b>SELECT</b> Administration  Add staff Expire staff Reset Password Change Login ID Role Manager Dealer/HO Mgr	 <b>SELECT</b> Payout Information  <b>SELECT DEALER</b>  <b>PAYOUT ADVICE</b> View or Print payout advice (PDF)  <b>FILE EXTRACT</b> Download Excel File



## Add a new salesperson

1. Click on “Administration” on the top right hand corner of the screen.



2. If applicable, select the “Dealer” you wish to add the salesperson to.

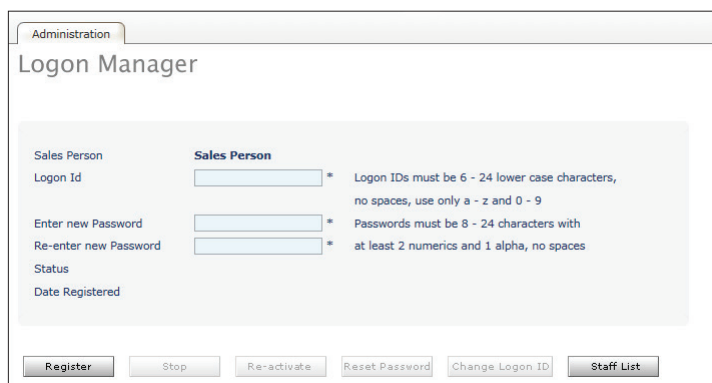
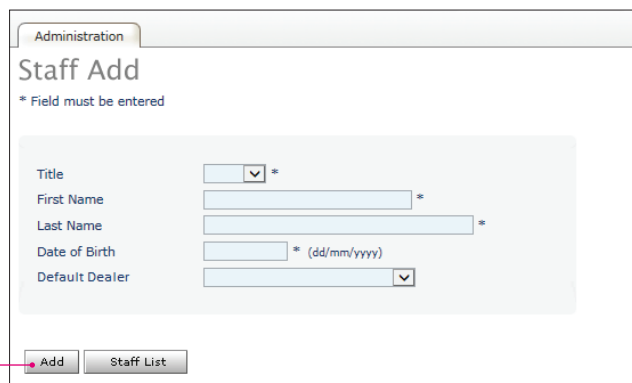
Then click “Search”.

At the bottom of the screen, click “Add”.

3. Enter the salesperson’s details (title, name and DOB).

Enter the “Default Dealer” for the salesperson.

Then click on “Add”.



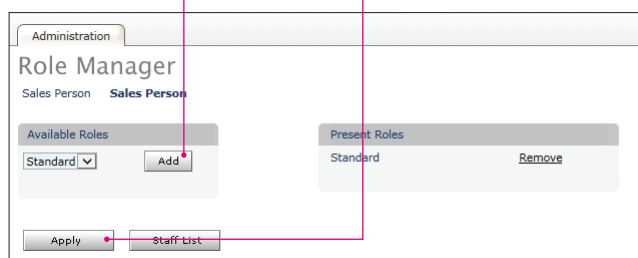
4. Enter a “Logon Id” for the salesperson. This must be between 6 and 24 characters using only a-z and 0-9.

Enter a **temporary password**. The salesperson will be required to change this when they first login. Password must be between 8 and 24 characters with at least 2 numeric and 1 alpha with no spaces.

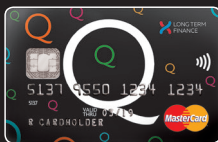
Then click on “Register”.

5. Select the assigned role (Standard or Admin).

Then click “Add”. Then click “Apply”.

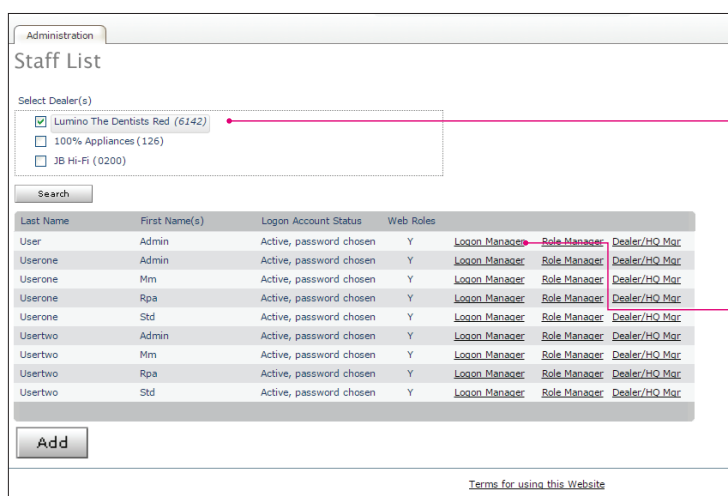
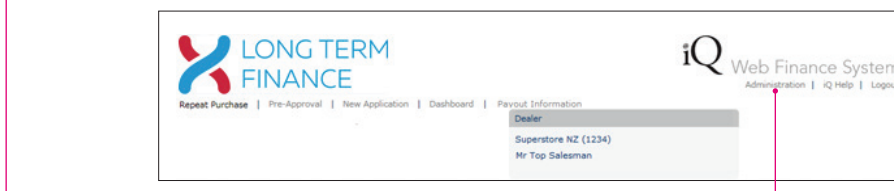


6. Once the assigned role has been added, the role will show up on the right hand side of the page.



## Reset Passwords and Logon ID

1. Click on “Administration” on the top right hand corner of the screen.

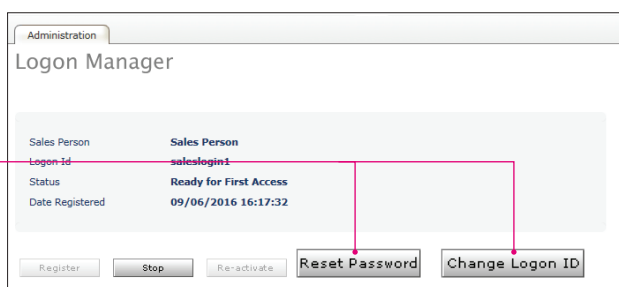


2. If applicable, select the “Dealer” you wish to access.

Then click “Search”.

Find the name of the salesperson that requires their logon ID or password to be reset.

Click “Logon Manager”.



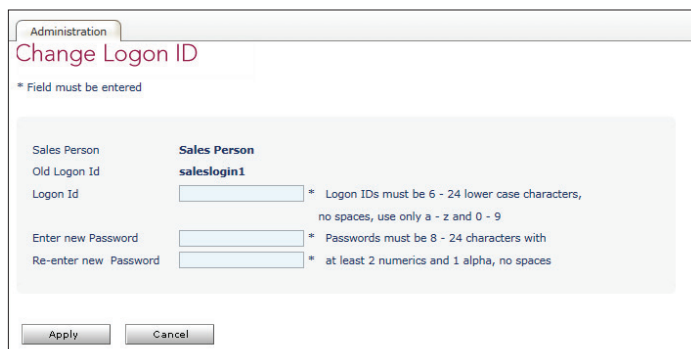
3. Click on “Reset Password” or “Change Logon ID”

## Change Logon ID

Enter the new “Logon Id”. This must be between 6 and 24 characters using only a-z and 0-9.

Enter a **temporary password**. The salesperson will be required to change this when they next login. Password must be between 8 and 24 characters with at least 2 numeric and 1 alpha with no spaces.

Then click on “Apply”.



## Reset Password

Enter a **temporary password**. The salesperson will be required to change this when they next login. Password must be between 8 and 24 characters with at least 2 numeric and 1 alpha with no spaces.

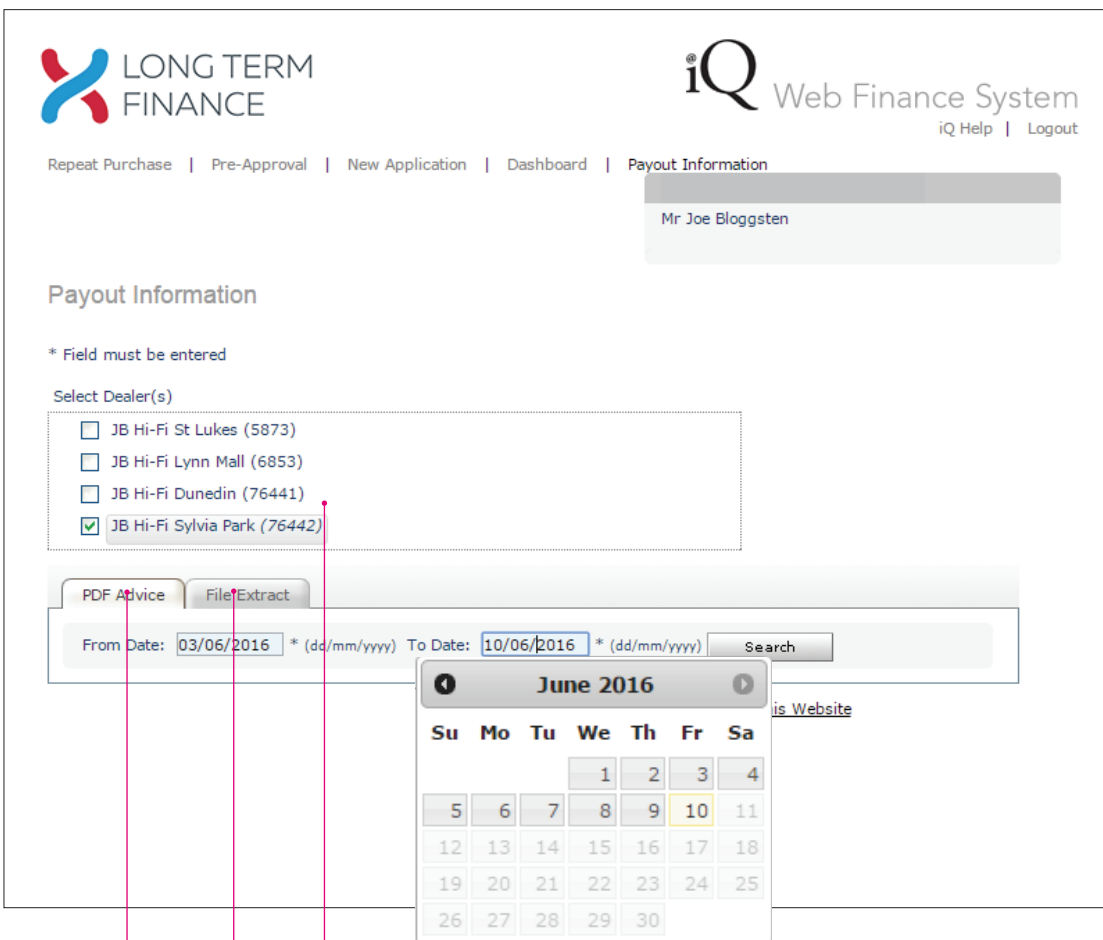
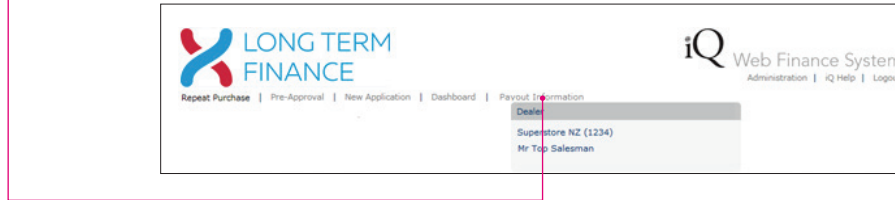
Then click on “Apply”.





## Extracting Payout Advices from iQ

1. Click on "Payout Information"



2. If applicable, select the "Dealer" you wish to access.

3. PDF Advice

Select the date range you would like to view and click "Search". Then select from the list returned to download or print PDF.

4. File Extract

Select "File Extract" to download Excel file for the date range entered.