

F&I Product Rating and Booking

User Guide







Setup and Registration

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Rating and Booking

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Reynolds and Reynolds' F&I Product Rating and Booking is available for ERA-IGNITE, F&I Menus, and the docuPAD[®] System The product rating feature gives you the ability to access your providers' pricing for service contracts, aftermarket products, and GAP products in real time. The product booking feature gives you the ability to transmit contract details to providers and receive completed F&I forms in return.

This guide will cover how to register your dealership and your aftermarket providers. It will take you through the specifications for the rating and booking features so you can customize them to fit your process. This will also show you how to rate and book your F&I products in a few simple steps.

You will need to have access to Finance and Insurance Specs to perform registration activities. This guide will outline how to set up security access for this.

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Finance and Insurance (Specs) → VSC Rating and Product – Screen Access

- ☑ Dealer and Product Registration
- ☑ Pricing Controls
- Additional Controls

To rate and book products you will need the following access:

F&I/Desking → Actions

PRB: Book/Void Contracts

PRB: Get Pricing

F&I/Desking → Screen Access

☑ VSC Rating and Product Display

F&I/Desking → Aftersales – Fields

☑ VSC Original Rating Cost (optional)

Step 1: Register your dealership

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(FIN Specs) - Sales and F&I

Miscellaneous <u>F</u>&I Specifications

Life & A&H Insurance Maintenance

F&I Conditional Event Defaults

Deal Manager Specifications

Credit Bureau Inquiry

(FIN Specs) - Sales and F&I

Residual / Balloon Entry

Insurance Date History

ODS Utilities

Maintenance Check Specifications

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Bank Defaults

F&I Menu Designer

Rate Data Entry

Forms

Deal Jacket

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Vendor Setup

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Dealer and Pr

Pricing Controls Additional Controls

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From the F&I/Desking main screen, click **System Tools** > **Specs**.

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Insurance Maintenance

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Life & A&H Default Selection

Life Reserve Deviation Rates

A&H Reserve Deviation Rates

Life & A&H Insurance Maintenance

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From the FIN Specs screen click **Functions** > **VSC Rating and Products** > **Dealer and Product Registration**.

Click **Register** next to the Dealer Name. When the system is finished processing, a success notification will pop up.

Note: Your Dealer ID# will be assigned when you register; no manual entry required.

Functions File Subscreens Tools Display Print System Tools Go To 🎯 🚸 | 🔚 🔍 🕨 | 📱 💹 🍠 🗢 🖸 | 🚚 🏗 🚰 🔝 🖙 🥀 | 🏈 🐵 💽 颁 Dealer and Product Registration Dealer Registration Dealer Name Registration Date Dealer ID# 3 REYNOLDS MOTOR CO. Register Processing... FINCVS01 - 1009 Registration was successful. Registration in progress... Please Wait... ок Dealer Select --Registered Providers/Products Provider/Product Registration Date Product Type

Step 2: Register providers and products

Provider ID

Processing...

Product request in progress..

Please Wait...

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Provider Selection

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Dealer and Product Registration		PPD26	A62	03/05/18	09:58	33
Dealer Registration					_	
Dealer Name	Dealer ID#	Registration Date				
TEST - OPEN ROAD MOTORS	133967	03/22/16	<u>Unregister</u>	<u>Update</u>		
ABC MOTORSPORTS	137076	11/09/16	<u>Unregister</u>	<u>Update</u>		
TEST - OPEN ROAD MOTORS 2	112078	09/09/13	Unregister	Update		
Dealer Select ABC MOTORSPORTS	(1 Register New P	roduct			
Provider and Product Registration Dealer Select ABC MOTORSPORTS Registered Providers/Products	(1		roduct			

Use the down arrow next to Dealer Select to select dealership name. Click **Register New Product**.

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2 Click the double arrow on the left to choose products to register from providers with which your dealership has an existing relationship.

Provider	Pro	vider ID						
CNA CNA	4							
Continental Warranty	109)						
Crystal Fusion	118	3						
SCI CSCI	52							
Dealer Admin Services	59							
Dealer Maintenance	72							
Ø Dealers Choice	60							
Demo Provider 3	35							
Product		Provider [Dealer ID	Product Code	Prefix Override	Status	^	
Demo GAP								
Demo Paintless Dent Repaintless Dent	ir							
Demo Theft Protection								
Demo Tire And Wheel								
Demo VSC							¥	
-					Register (F12)	Cancel	٦	
Ø Dent Wizard	74							-
Dent Wizard MV	20							
Ø Dent Zone	96							
Ø DentPro	121							

3 The products available for the provider will then display. Enter the Provider ID given to you by the provider next to the products you wish to register. Uncheck the boxes next to the products you do not want to register. Next, click **Register (F12)**.

> Note: The Provider Dealer ID is issued by your provider. If the provider requires a product code or prefix override, they will supply that to you as well. If you do not know your ID, you will need to contact your provider or provider agent.

	Provider ID	
Accelerated Service Inter	78	
Advanced Protection Produ	89	
Advantage Product Pipelin	36	
AFAS	24	
Allstate	6	
Ally (APP)	65	
Ally (Vehicle One)	FINCVSX1 - 1003	×
Alpha Warranty Services		
American Auto Guardian	Product Rev	gistration is complete.
American Guardian	IMPORTAN	gistration is complete. T: Please contact Demo Provider for
American Guardian ANICO	IMPORTAN details on R	T: Please contact Demo Provider for Rating, Booking, Voiding and
	IMPORTAN details on R Remittance	T: Please contact Demo Provider for Rating, Booking, Voiding and . You may also contact the
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ANICO ArmorAll ASC Warranty Assurance Plus	IMPORTAN details on R Remittance	Tr. Please contact Demo Provider for Vating, Booking, Voiding and You may also contact the Reynolds Support Team.
 ANICO ArmorAll ASC Warranty Assurance Plus Audi Financial Services 	IMPORTAN details on R Remittance	Tr. Please contact Demo Provider for Vating, Booking, Voiding and You may also contact the Reynolds Support Team.
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ANICO ArmorAll ASC Warranty Assurance Plus Assurance Issue Auto Financial Services Autoshield	1 IMPORTAN details on R Remittance Reynolds &	Tr. Please contact Demo Provider for Vating, Booking, Voiding and You may also contact the Reynolds Support Team.

`	You will receive a Registration Complete
	pop up box; click OK . Then click Close in
1	the bottom right corner of the Provider
9	Selection screen.

Select the Product Type by clicking on the drop down list next to each product that was registered. You can select Aftermarket, ESC/Maintenance, or GAP based on your processes.

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(FIN Specs) - Sales and F&I				-		\times
Functions <u>File</u> <u>Subscreens</u> <u>T</u> ools <u>D</u> isplay <u>F</u>	<u>Print</u> System Tools <u>G</u> o T	0				
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Dealer and Product Registration		PPD26	A62	03/05/18	10:20: 3	33
- Dealer Registration						
Dealer Name	Dealer ID#	Registration Date				
TEST - OPEN ROAD MOTORS	133967	03/22/16	Unregister	<u>Update</u>		
ABC MOTORSPORTS	137076	11/09/16	Unregister	<u>Update</u>		
TEST - OPEN ROAD MOTORS 2	112078	09/09/13	Unregister	<u>Update</u>		
Dealer Select ABC MOTORSPORTS Registered Providers/Products Dealer Select ABC MOTORSPORTS		Register New				
Provider/Product Demo Paintless Dent Repair	03/05/	ation Date Produc		▼ Unregis	tas	-11
Demo Theft Protection	03/05/			Unregis	_	-
Demo Tire And Wheel	03/05/			▼ Unregis	_	-
Demo VSC	03/05/		aintenance	 Unregis 		-1
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F1 Help F2 List F3		GAP]	5	date	
F1 Help F2 List F3		GAP]	5	date	

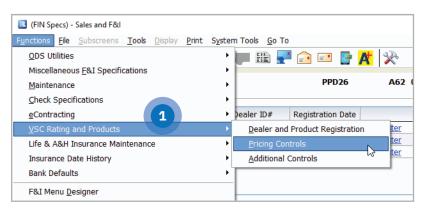
IMPORTANT

It is imperative that you contact your provider(s) for important information regarding their specific rating, booking, voiding, and remittance processes after you have successfully completed the registration process. Some providers require additional steps to be taken in order to properly rate, book, void, and remit contracts.

You can also contact Reynolds at 800.767.0080 for specific details.

Step 3: Set Product Integration Controls for pricing and profit information by product

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cing Controls														PPD12	A63 02/27/10	13:58:
aler Select Pricing Control aler Select ABC MOTORSPORTS	•														Deal #	9
termarket ESC/Naintenance GAP																
permanent [Eortheauxenance PAN				-												
				2			Re			Cost			Surds			
Provider/Product	N/U Plan	Month	- MA	_		Fasts			Rounding	Flat Amt S0 S / %	Pack D		/% 8	Markup Rounding	Display Misc Product Ma	
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Demo Appearance Protection	• 🍇 Both 💌						• \$	 199.0 	Nett X.99 💌	🗆 s 💌	99.00 C				▼ No	•
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Demo Paintless Dent Repair	* 🚉 Used *						15	•	Next X.99	- % •	10 C				 Used 	•
Demo Theft Protection	Both Theft Protection															
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From the FIN Specs screen click Functions > VSC Rating and Products > Pricing Controls.

2 Define markup percentages or amounts by product type.

Dealer Select Pricing Controls

- Select the option of setting an overall default or itemizing per specific provider/product.
- It is possible to set certain parameters such as New/Used, Plan, Months, or Miles.
 - Note: Plan name has to be **exactly** as the rating would display
- Retail Price
 - Flat Amt
 - Cost vs. List Basis
 - Markup based on % or \$
 - Rounding (ex. Next X.00 or Next X .99)
- Cost Pack % or \$
 - Flat Amt
 - Pack \$ or %
- Surcharge
 - Cost vs. List Basis
 - Markup based on % or \$
 - Rounding
- Display Misc Product Modal
 - Display Product Modal only on new, used, or both (ex. Business Use, Warranty Remaining)
 - Do not display the modal at all by selecting No
 - Note: Pricing Control specifications are set for each Dealer Select and also by Aftermarket, ESC, Maintenance, and GAP.

inctions <u>Fi</u> le Subs	reens Tools	🕞 🔥	**
Additional Contr Default Product Dealer Select ABC	rols PP	D26	A62 01/
Dealer Select Abc	Preferred Product		emotically Rate
Aftermarket	Demo Tire And Wheel	Aut	omatically Rate
ESC 1	Demo VSC		
ESC 2	bellio vsc		
Maintenance 1			
Maintenance 2		Ţ	
GAP	Demo GAP	•	
Override Afterma	arket Description with Provider Plan Description	ucts	
Override Markup	Rules Spot Deliver Status Warning	na messa	ae 🔻
Save Product Price		nessage	•

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Afte	rmark	et Product Maintenance				Ľ	4									
	Code	Description	VSC Rating Provider		Тах	-	PI	rofit		We Owe		Price	\$0	Cost	Commi	ss ^
1	DEMO	APPEARANCE PROTECTION	Demo Appearance Protection	F	Yes	•	в	ack-End	•	No	•	0.00				-
2	01	CAR CARE		┍	Yes		В	ack-End	•	No	নি	0.00				
3	02	WEAR & TEAR		-	Yes		B	ack-End	•	No	•	0.00				
4	04	TIRE AND WHEEL	Demo Tire And Wheel	•	Yes		B	ack-End	•	No	•	0.00				
5	12	ROAD HAZARD		F	Yes	- 1	B	ack-End		No	P	0.00				
6	AFT11	AFT 11		F	Yes	- 1	В	ack-End	নি	Yes	F	0.00				
7	AFT12	TIRE & WHEEL		F	Yes		В	ack-End	•	No	•	0.00				
8	AFT13	WINDOW ETCH		•	Yes		B	ack-End	•	No	•	0.00				
9	AFT14	ADD-ON AUTO ACCESSORIES		Ξ	Yes		FI	ront-End	⊡	Yes	•	0.00				
10	AFT15	AFTMKT 15		F	No	- 1	r Fi	ront-End		No	P	0.00				
11	AFT16	THEFT PROTECTION	Demo Theft Protection	F	No		В	ack-End	•	No	•	0.00				
12	AFT17	AFTMKT 17		F	No	- 6	FI	ront-End	•	No	•	0.00				
13	AFT18	AFTMKT 18		•	No		FI	ront-End	•	No	•	0.00				
14	AFT19	AFTMKT 19		F	No	- 1	r Fi	ront-End	P	No	P	0.00				
15	AFT20	T&W		F	No		FI	ront-End	•	No	F	0.00				
16	AFT21	PAINTLESS DENT REPAIR	Demo Paintless Dent Repair	F	Yes		B	ack-End	•	No	•	0.00				
17	AFT22	ADTMKT 22		•	No	- 1-	FI	ront-End	•	No	•	0.00				
18	AFT23	AFTMKT 23		Ē	No		B	ack-End	•	No	•	0.00				
19	AFT24	AFTMKT 24		F	No	- 1	В	ack-End	নি	No	নি	0.00				
20	AFT25	AFTMKT 25		F	No		В	ack-End	•	No	•	0.00				
21	ACT2	ALL 2		E.	No	1	. 0	ack-End		No	E)	905.00		25.00		

From FIN Specs screen, Click Functions > VSC Rating and Products > Additional Controls

Default Product

- For each dealer select, select the default product you will see in the Product and Rating Request screen for each group.
- By checking the Automatically Rate box, it will force the pricing to pull within the Product and Rating Request screen without having to manually click 'Get Pricing'.

F&I Menus Controls

- Override Markup Rules → If this is not selected, the Menus markup rules are used. If this is selected, then those rules are overridden. As an example, if Menus has a \$200 markup limit, but the rated product is marked up \$500, you will want to override the Menus markup limit by checking this box.
- Retail Price is the price before the Menus discount has been applied (if applicable).
- Sale Price is the price after the Menus discount has been applied (if applicable).

Then choose Unbooked Aftermarket Product rules.

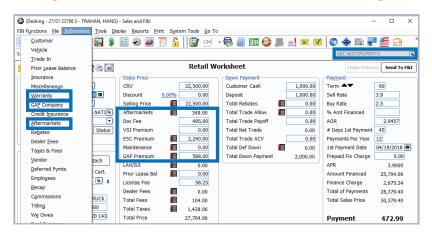
Unbooked Aftermarket Products Rules

- You can set what messages (if any) pop up when delivering or closing a deal
 - No message Deal will Deliver or Close without message.
 - Warning message Deal will inform associate they have unbooked products, but will allow them to finish the deal.
 - Error message Deal will inform the associate they have unbooked products, and will not allow them to finish the deal.
- From the FIN specs screen, select Aftermarket Product Maintenance found under ODS Utilities. Registered provider(s)/ product(s) can be selected to default for each individual aftermarket code when rating.

Now you are ready to rate and book your products.

Product Rating

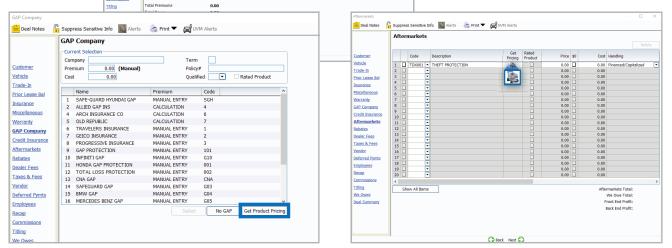
Rating from a deal record in ERA-IGNITE or Desking



Step 1: You can rate products from the Aftermarket, Warranty, and GAP subscreens or by clicking on the corresponding icons in the deal worksheet, or access the window(s) in the Subscreens menu that corresponds to the product.

Note: VIN and Mileage are required to rate products.

- 😑 Deal Notes 🛛 🔓 Suppress Sensitive Info 🎆 Alerts 🛛 🍖 Print 🔻 🛃 UVM Alert Warranty . 8 • licy Nu 03/05/2018 🔳 Plan Type ESC 1-ESC 2-Frade-In Rated Rated Prior Lease Bal Plan Nam insurance 0.00 0.00 🗆 \$0 0.00 🗌 \$0 0.00 50 **\$**0 Miscellar 0.0 0.00 0.00 Warranty 0.00 0.00 0.00 0.00 GAP Co 0 Ex 0 E 0 Đ 0 Đ Credit Insurar Aftermarkets Rebates 0 Ex 0 Ex • ۲ • . 0.00 0.00 0.00 <u>Dealer Fees</u> Taxes & Fees AOA AOA AOA eferred Pym mployees
- Step 2: Click the Get Product Pricing button (on the Warranty or GAP Company window) or the Shopping Cart icon in the Get Pricing column (on the Aftermarkets window) to display the Product and Rating Request window, where product pricing can be retrieved.



R

Product and Rating Request								×
- Vehicle Information								
VIN 1FTEX1CB3JFB13119 Deal Date 03/05/18 New	v/Used/Demo Ne	N						
Vehicle Description 2018 FORD TRUCK F-150 2WD SUPERCAR	3							
Odometer 12 Rating In-Service Date 03/05/2018	m							
Used Vehicles: Active Manufacturer Vehicle Warranty	Original Owner							
Product Information								
Product Type ESC1			Prompt Miscella	neous	Product Opt	ion		
Provider/Product Demo VSC		- 🔁	Use Retail Price	in De	al			
Plan	Ded	ictible	Product Price		Surchar	ges	Pr	ice
Plan Name					B	ase Product Price		0.00
Form Number					S	elected Surcharges		0.00
Limited Warranty					Т	otal Product Price		0.00
Provider Deductible Description * = deductible is reduced to the listed price								
* = deductible is reduced to the listed price ** = deductible is reduced to zero								
= deductible is reduced to zero								
				Ge	t Pricing (F5)	Save Product (F12)	Ca	ncel

Viscellaneous Product Options

Surcharges-

Miscellaneous Rate Book Code

Lender Code

OK (F12)

Surcharges

×

•

•

Cancel

- Step 3: In the Provider/Product field, select the provider and product to obtain pricing for. Use the dropdown arrow in this field to display registered providers. Then click Get Pricing (F5) to rate the selected product and display plans and pricing.
 - The padlock can be toggled on or off to display or hide cost and profit amounts. This option is available based on security access.

Note: If Automatically Rate was checked in the Additional Controls, the Get Pricing step would be skipped.

Step 4: If there are any surcharges that may apply, the Miscellaneous Product Options window will display. Select surcharges as necessary and click **OK (F12)**.

roduct and Rating Request Vehicle Information	
VIN 1FTEX1CB3JFB13119 Deal Date 03/05/18 New/Used/Demo New	
Vehicle Description 2018 FORD TRUCK F-150 2WD SUPERCAB Ddometer 12 Rating In-Service Date 03/05/2018	
Used Vehicles: Active Manufacturer Vehicle Warranty Original Owner	
Product Information Product Type ESC1	
Product Type ESC1 Provider/Product Demo VSC	Prompt Miscellaneous Product Option
Plan Deductible	Product Price Surcharges Price
lan Name orm Number	Base Product Price 0.0 Selected Surcharges 0.0
imited Warranty	Total Product Price 0.0
anneo warrany	
rovider Deductible Description	
= deductible is reduced to the listed price	
* = deductible is reduced to zero	
	Get Pricing (F5) Save Product (F12) Cance
	Concernang (FD) Save Probact (FE2)

Step 5: You can turn the prompts on or off for the miscellaneous product option using the checkbox labeled 'Prompt Miscellaneous Product Options'. Also, if a price is established in a deal but rating will still be necessary for cost, check the box for 'Use Retail Price in Deal.' When the product is saved back to deal, the retail price will not be altered but the correct cost/ plan information will reflect for booking purposes.

> Note: If you choose to skip the Misc Product Options screen, selections can be missed that may result in improper ratings for certain providers/products.

Product and Rating Request							×
- Vehicle Information							
VIN 1FTEX1CB3JFB13119 Deal Date 03/05/18 New/Used	d/Dom	Now					
Vehicle Description 2018 FORD TRUCK F-150 2WD SUPERCAB	u/Den						
Odometer 12 Rating In-Service Date 03/05/2018							
Used Vehicles: Active Manufacturer Vehicle Warranty Orig	ginal C	Owner					
Product Information							
Product Type ESC1			Prompt Miscellan	eous Pro	duct Option		
Provider/Product Demo VSC		• 7	Use Retail Price in	n Deal			
Plan		Deductible	Product Price		Surcharges	Prio	е
Basic Wrap		0.00	1262.00		1 ton or greater	320.00	J
Bronze WEB			1062.00		4x4/AWD	300.00	3
Discountable Regulated Plan		100.00	862.00		Commercial Use	300.00	3
Gold - New Vehicles		100.00/0.00**	662.00		Diesel	75.00	
Gold Wrap		200.00/50.00*	800.00		Electronic High Tech	75.00	3
12/12000					Hybrid	100.00	-
24/24000					Seals & Gaskets (0-100,0	50.00	-
36/36000					Seals & Gaskets (100,00	75.00	-
48/48000					Technology Package	100.00	-
60/65000 🗸	~				Turbocharger	150.00	נ
Plan Name Gold Wrap					Base Product Price	1262	2.00
Form Number DAP DemoForm_WARRANTY					Selected Surcharges	C	0.00
Limited Warranty N/A					Total Product Price	1262	2.00
Provider Deductible Description \$0							
* = deductible is reduced to the listed price							
** = deductible is reduced to zero							
				Get Pr	icing (F5) Save Product (F12)	Cano	cel

Step 6: Select a product and plan by clicking the plus sign which displays available policies within that plan. Choose a policy by placing a check in the appropriate box and then choose a deductible. If any surcharges were returned, they will be listed in the surcharge box. Click Save Product (F12) to add the product to the deal. The deal record is automatically updated with the pricing information for the product. Details for the product are recorded on the Warranty, GAP Company, or Aftermarket window as appropriate.

> Note: Changing certain details in the deal record, including but not limited to the vehicle information and deal date, may require you to re-rate or re-book the product to reflect the changes.

Rating from F&I Menus presentations

Item Name Item Type Aftermarket Code LAH Type	Vehicle Appearance Protection AfterMarketItem AFT13 - WINDOW ETCH	Allow Runtime Editing Allow Price Allow Vero Price Allow Cost Allow Cost Allow Cost Allow Cost Allow Cost Allow Verrantly Data Allow Zero Months Allow Deductible Allow Cost	
Plan Name Months	0	Allow Deductible Allow Custom Tag1	
Miles	0	Presentation File	 [%]
Deductible	0.00	Item Description	
Retail Price Discount	250.00	Maintain showroom condition. Protects paint from bugs, tree sap, bird droppings and other pollutants. Protects interior fabric and leather from	18
Sale Price Cost	80.00	fading and stains	
Premium Markup-	- <u> </u>	Decliner Statement	
Minimum Markup Maximum Markup	0.00		<u>18</u>
- Maximum Discount- Maximum Discount	0 0.	Disability Disclaimer	
Custom Tag 1			
Provider/Product De	mo Appearance Protection		

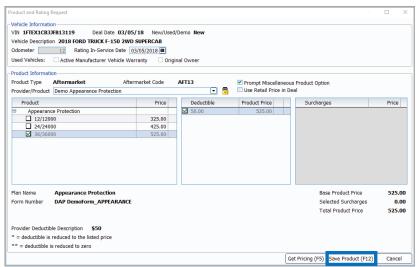
F&I Menu Designer-Setups

Go to Tools > F&I Menu Designer

Within a menu, double click a product to open Package Item Properties.

In Package Item Properties, you have the option to default a provider/ product for that particular package item in the menu. You also have the option to check the box to Automatically Rate when the Editor button is selected.

- Deal Number 23798 F&I Manager Base Payment \$415.25 22566.25 Down Payment 3.9 Total Rebat 2000.00 Rate Base Payment \$357.84/72mo/4.4% 22500.00 Term 60 Net Trade Vehicle Service Contract rvice C Pays costs of parts and labor on c repairs for 36 months or 36,000 mi \$0.00 deductible. \$1262.00(@\$23.22/mth GAP Protect GAP PI ween actual cash and loan balance if your ve a total loss due to theft or @\$13.52/mth ehicle Appearance Pr... 📓 off fading and stains tree sap, bird droppings and oth Protects interior fabric and leath \$400.00(@\$7.36*h* \$400.00(@\$7.36 Window Etch 1 \$299.00 \$1262.0 age Total Pric \$1662.00 Package Total Price \$0.00 Package Discount \$1997.00 Package Total Pric \$0.00 Package Discount \$0.00 \$0.0 \$1662.00 O 72 97.00 72 60
 - Vehicle Appearance Protection Editor \times Vehicle Appearance Protection Aftermarket AFTMKT 13 Custom Tag 1 Custom Tag 2 Aftermarket Code AFT13 Retail Price 250.00 Discount 0.00 250.00 Sale Price 80.00 Cost Apply to All Package Items Get Pricing (F5) ОК Cancel



Step 1: Select a Menu package to rate by placing a checkmark in the appropriate box. Then click the **Editor** button next to a package item to enter the Editor window.

> Note: To select the Editor button, the Allow Runtime Editing option must be checked in F&I Menu Designer > Package Item Settings.

- Step 2: Click Get Pricing (F5) to display the Product and Rating Request window, where the products can be rated.
- Step 3: After selecting the desired product and plan on the Product and Rating Request window, press Save Product (F12) to close the window and automatically enter the amounts for the selected product on the Editor window.
- **Step 4**: Click **OK** to save the package item and return to the F&I Menus window, where the package item has been updated.

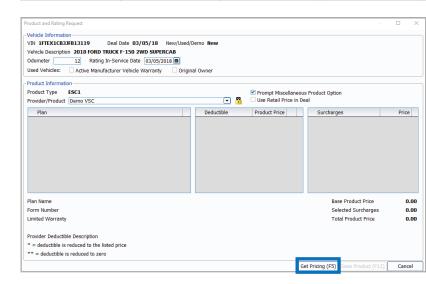
Rating from docuPAD – Customize Deal Menu

- Finance Option 1 Term 36 Pmts/Yr 3 Rate 2.9
 Finance Option 2 Term Pmts/Yr Rate Base Payment 1 884.32 Base Payment 2 N/A Denny 1 Denny 2 Denny 4 Dent Restore Plus - 3 Years Combo CLAH test **OwnerShield** Tender Loving Care - Platinum Retail Price 🏼 🗯 Retail Price 🏼 🗱 100.00 Retail Price 🍔 🛅 1.00 566.33 Retail Price 🏼 🗯 0.00 Months Months Deductible Months Cost 0.00 Miles 0.00 /iles Repla ect Coverage Cost 50.00 Deductible Deductible 0.00 Allied GAP - GAP Cost Replao ct Coverage Cost Retail Price 🍰 🗯 0.00 Key Replacer ent - Standard eplace erage ABSOLUTE Tire & Rim Protecti. Ford Protection Plan - Basic G... Months Retail Price 🍔 📷 399.00 Miles Months Miles 36 Retail Price 🙎 📷 199.00 etail Price 🙎 📷 0.00 Deductible 0.00 Cost 36 onths 465.00 79.00 Deductible 0.00 Cost Miles Replace Cost 199.00 Deductible 50.00 t Coverage AFTERMARKET 1 - AFT1 0.00 Replace Select Coverage ost Tire & Wheel Protection - Pro... eplace ct Coverage Retail Price 🚅 🛅 200.00 Car Care Upgrade - Elite1 No Retail Price 🍔 📷 0.00 Months Miles etail Price 🔮 🛅 Months 36 1100 349.00 Cost 0.00 eductibl 111.00 /onths Replao Cost 20.00 Miles 0.00 Theft Coverage Doductible Cost Service Maintenance Agreem... 0.00 Retail Price 🚅 🗯 0.00 Select Coverage enlace Months Retail Price 🍰 🗂 0.00 Miles Deductibl Miles Cost 0.00 0.00 Cost 0.00 Replace ect Cov erage Replao ct Coverage
- Step 1: Go to FIN Functions > Attach docuPAD Menu. When the docuPAD Menu Select screen opens, choose Menu and click OK. Within the Customize Deal Menu screen, click on Select Coverage for the required product.

Step 2: Click Get Pricing (F5) to display the Product and Rating Request window, where the product can be rated.

> Note: The system can be setup to default the provider/product as well as automatically rate when select coverage is selected. For assistance, please contact docuPAD support.

Step 3: After selecting the desired product and plan on the Product and Rating Request window, click Save Product (F12) to close the window and automatically enter the amounts for the selected product on the Coverage window.



Product and Rating Request						
Vehicle Information						
VIN 1FTEX1CB3JFB13119 Deal Date 03/05/18 New/	Jsed,	/Demo New				
Vehicle Description 2018 FORD TRUCK F-150 2WD SUPERCAB						
Odometer 12 Rating In-Service Date 03/05/2018	ĩ					
		nal Owner				
osed venicles. Active Manufacturer venicle warrancy	Ungi	lidi Owilei				
Product Information						
Product Type ESC1			Prompt Miscellan	eous Pro	duct Option	
Provider/Product Demo VSC		T	Use Retail Price i	in Deal		
Plan	^	Deductible	Product Price		Surcharges	Price
Basic Wrap		0.00	1262.00		1 ton or greater	320.00
Bronze WEB		50.00	1062.00		4x4/AWD	300.00
Discountable Regulated Plan		100.00	862.00			300.00
Gold - New Vehicles		100.00/0.00**	662.00		Diesel	75.00
Gold Wrap		200.00/50.00*	800.00			75.00
12/12000					Hybrid	100.00
24/24000					Seals & Gaskets (0-100,0	50.00
36/36000					Seals & Gaskets (100,00	75.00
48/48000	-				Technology Package	100.00
60/65000	V				Turbocharger	150.00
Plan Name Gold Wrap					Base Product Price	1262.00
Form Number DAP DemoForm_WARRANTY					Selected Surcharges	0.00
Limited Warranty N/A					Total Product Price	1262.00
Provider Deductible Description \$0						
* = deductible is reduced to the listed price						
** = deductible is reduced to zero						
				Get Pr	icing (F5) Save Product (F12)	Cancel

Selected Ci Retail Price 756.00 Rated Cost 756.00 Months Deductible Miles 60000 03/05/2023 🔳 Expiration Date Expira elected Co Retail Price 756.00 Rated AddOn Cost 756.00 Months 60 ADDON : ADDON 4 ADDON 2 ADDON 5 Terms • Deductible Miles 60000 03/05/2023 🔳 Expiration Miles 60000 ed after Pr Expiration Date Check Selected Coverage values AddOns ADDON 1 ADDON 2
ADDON 5 ADDON 3 ADDON 4 Plan Name VSC Gold (N) 60/600 Get Pricing (F5) Save to all options Save to this option Cancel

AddOns AddOns Ø AdDON 1 Ø ADDON 2 Ø ADDON 3 Ø ADDON 4 Ø ADDON 5 Ø ADDON 6	Deductibles Terms	E1 •		Cost Deduc	 756.00 756.00 03/05/2023 (III)	Rated Months Miles Expiration Mile	60 60000 s 60000	
Product Rating and Booking Selected Coverage	AddOns ADDON 1 ADDON 4	☑ ADDC	N 5	_				

Customize Deal Menu - 28761	- TRAHAN, HAI	NG (Denny's Menu)					- 🗆 ×
Finance Option 1 Term	36 Pmts/Y	r 3 Rate 2.9	Base Paymer	t1 884.32			
Einance Option 2 Term	Pmts/Y	r Rate	Base Paymer	t2 N/A		Aftersales and	Aftermarket Review
Denny 1		Denny 2		Denny 3		Denny 4	
Dent Restore Plus -	3 Years	OwnerShield		Tender Loving	Care - Platinum	Combo CLAH te	st
Retail Price 🐕 🛅	100.00	Retail Price 👷 🛅	1.00	Retail Price 🚆 🛅	566.33	Retail Price 🐕 📆	0.00
Months	36	Months	0	Months	0	Cost	0.00
Deductible	0.00	Miles	0	Miles	0	Replace	Select Coverage
Cost	50.00	Deductible	0.00	Deductible	0.00	Allied GAP - GA	P
	ect Coverage	Cost	0.01	Cost Replace	0.00	Retail Price 🍰 📷	0.00
Key Replacement - S	Standard		Select Coverage		Select Coverage	Months	0.00
Retail Price 🍰 📷	399.00	ABSOLUTE TIPE	& Rim Protecti	Fora Protection	n Plan - Basic G	Miles	0
Months	36	Retail Price 🍰 🗯	199.00	Retail Price 🍰 📆	0.00	Deductible	0.00
Miles	0	Months	36	Months	0	Cost	465.00
Deductible	0.00	Cost	79.00	Miles	0	Replace	Select Coverage
Cost	199.00		Select Coverage	Deductible	50.00	[
Replace Sel	ect Coverage	AFTERMARKET	1 - AFT1	Cost	0.00		
Tire & Wheel Protec	tion - Pro			Replace	Select Coverage		
		Retail Price 🛸 🛅	200.00	Car Care Upgra	de - Elite1 Non		
Retail Price 🐔 🚺 🕌	165.00	Months	11				
Months	36	Miles	11000	Retail Price 🚆 🛅	349.00		
Cost	165.00	Deductible	111.00	Months	0		
	ect Coverage	Cost	20.00	Miles	0		
Theft Protection - R	oad Hazar		Select Coverage	Deductible	0.00		
Retail Price 🍰 👼	0.00	Service Mainte	nance Agreem	Cost	0.00		
Months	0.00	Retail Price 🔮 🗯	0.00	Replace	Select Coverage		
Miles	0	Miles	0.00				
Deductible	0.00	Cost	0.00				
Cost	0.00	Replace	Select Coverage				
	ect Coverage						
PRODUCT TEST 02/13		(
Potail Prico 🤌 😁 😫	756.00						

Step 2: Click Get Pricing (F5) to display the Product and Rating Request window, where the product can be rated.

> Note: The system can be setup to default the provider/product as well as automatically rate when select coverage is selected. For assistance, please contact docuPAD support.

Step 3: After selecting the desired product and plan on the Product and Rating Request window, click Save Product (F12) to close the window and automatically enter the amounts for the selected product on the Coverage window.

> Note: It is very important to verify that the coverage shown in the Available Coverages matches with the plan selected under Product Rating and Booking Selected Coverage. For example, "Coverage2" was a change that no longer matches the VSC Gold.

- Step 4: Select Save to all options or Save to this option.
- Step 5: Once all applicable products have been rated, select **Ready for** docuPAD (F8).

Note: The 🕌 icon will serve as an indicator that the pricing was obtained through Product Rating and Booking.

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Rating from docuPAD – Menu of Options

Product Editor

NEW CAR LOAN Menu of Options Denny 1 Denny 2 Denny 3 Denny 4 ustom Eyes Custom Eyes Custon Dent Restore Plus - 3 Years OwnerShield 0 deductible Tender Loving Care -Platinum Combo CLAH test E \$0 (\$0. Edito Edit Edit Edit hs / 0 deductible ABSOLUTE Tire & Rim Protection - 3 Years Key Replacement -Standard Ford Protection Plan - Basic Guard Allied GAP - GAP Edit Edit Edit Car Care Upgrade - Elite1 Non Syn Tire & Wheel Protection Protect Tires Only AFTERMARKET 1 - AFT1 Edit d Edit Edit Service Maintenance Agreement Winegardner -Service Maintenance Theft Protection - Road Hazard Coverage Edit Edit PRODUCT TEST 02/13/2017 - COVERAGE1 60 months / 60000 miles / 0 de Edit

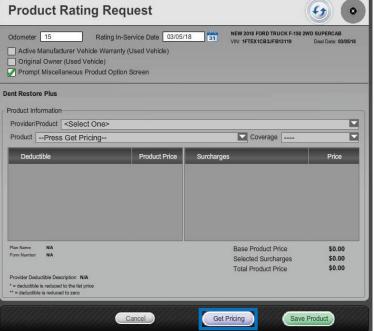
0

Step 1: Flip the workstation screen so that the Edit product buttons are available. Click on the Edit button to open the Product Editor Window.

Step 2: Select Get Product Rating to open the Product Rating Request modal.

Step 3: Click Get Pricing to rate the product.







Product Rating Request	 •
Odometer 15 Rating In-Service Date 03/05/1 Active Manufacturer Vehicle Warranty (Used Vehicle) Original Owner (Used Vehicle) Original Owner (Used Vehicle) Prompt Miscellaneous Product Option Screen	18 NEW 2018 FORD TRUCK F-150 2WD SUPERCAB VIN: 1FTEX1CB3JFB13119 Deal Date: 03/05/18
Dent Restore Plus	
Product Information	
Provider/Product <select one=""></select>	
Product Press Get Pricing	Coverage
Plan Name NA Form Number NA Provider Deductible Description N/A	Surcharges Price Base Product Price \$0.00 Selected Surcharges \$0.00 Total Product Price \$0.00
*= deductible is reduced to the list price ** = deductible is reduced to zero Cancel	Get Pricing Save Product
Product Editor	•
Dent Restore Plus - [3 Years] 165.00 RA23PL1173NA (10/06) Coverage: 3 Years Rated	
Torm: Montha 36	

0.00

Cancel

K

Reset

Step 4: Choose the appropriate product plan name and coverage from the dropdown lists and click Save Product.

Step 5: Use either Save to This Package or Save to All Packages to save the product information and return to the Menu of Options screen.

> Note: In the product editor window, Rated will display next to the coverage dropdown. The rating information displays in the bottom left of the window.

Get Product Rating

Save to This Package Save to All Packages

Product Booking and Printing

65 WELLS FARGO CONT-OH 243 WE OWE FORM (NO REV 3 WE OWE (11/95) 349 WE OWE (03/13) 72 VA TITLE APP (12/05) 4 VA REGISTRATION APP (12/05)									
3 WE OWE (11/95) 349 WE OWE (03/13) 72 VA TITLE APP (12/05)					NONE				
349 WE OWE (03/13) 72 VA TITLE APP (12/05)	Lacor				MISCELL	ANEOUS			
72 VA TITLE APP (12/05)					MISCELL	ANEOUS			
	docuPA	D			MISCELL	ANEOUS	Preview		First Form
4 VA DECICEDATION ADD (Laser				STATE F	ORMS/TITLE APP			
4 VA REGISTRATION APP (07/05) Laser				STATE F	ORMS/TITLE APP			
102 VA BUYERS ORDER-M (N	D REV) Laser				MISCELL	ANEOUS			
101 VA BUYERS ORDER-A (01	/02) Laser				MISCELL	ANEOUS			
57 US BANK CONTRACT-OH	(01/02) Impact				RETAIL O	ONTRACT			
15 US BANK ATPI	Impact				AGREEM	ENT TO PROVIDE			
258 UNITED CAR CARE VIPCA	-WA (07/05) Impact				ESC/WA	RRANTY			
201 TX TT/PMT VERIFICATIO	N (08/05) Impact				STATE F	ORMS/TITLE APP			
200 TX TT/PMT VERIFICATIO	N (01/05) Impact				STATE F	ORMS/TITLE APP			
199 TX TT/PMT VERIF (10/00) Impact				STATE F	ORMS/TITLE APP			
206 TX TRADE3 POA-PDF (11	/09) DP docuPA	D			STATE F	ORMS/TITLE APP	Preview		
205 TX TRADE2 POA-PDF (11	/09) DP docuPA	D			STATE F	ORMS/TITLE APP	Preview		
204 TX TRADE1 POA-PDF (11	/09) DP docuPA	.D			STATE F	ORMS/TITLE APP	Preview		
141 TX TITLE ISSUE CNTY-PI					STATE F	ORMS/TITLE APP			
140 TX TITLE APP-PDF (05/1					STATE F	ORMS/TITLE APP			
202 TX TITLE APP-PDF (04/1						ORMS/TITLE APP			
203 TX SOLD POA-PDF (11/0)	9) DP docuPA	.D			STATE F	ORMS/TITLE APP	Preview		
int Queue	lay docuPAD Forms C	·				fresh (F5) Prepare	docuPAD	Forms (F	8) Print (F1
Select All Forms Print All			J Print All Pages	(docuP/	AD only)				Print Queu
	decine econdracer on	110							
Provider/Product Plan/Pr	oduct	Contract	Provider Statu	is doci	uPAD				
Demo Appearance Appear	ance Protection							on docuP/ t Unbook	

Additional Fields for Contract Booking X Additional Fields Enter Additional Data Enter the Tire Dizze Enter the Tire Description Enter the F&I Managers Name OK (F12) Cancel Once a product is added to a deal, you can book the contract from the F&I Forms window, accessed by selecting **Print > F&I Forms**. On this window, simply select the product to book in the Aftermarket Product Booking and Reprint section and click **Book Contract (F9)**.

You can also choose **Select Unbooked** to book all products simultaneously.

Once you select and Book Contract (F9) you will get an option to preview the form(s) on screen or print automatically.

A contract number assigned by the provider is automatically entered in the Contract # column and the status is changed to Booked.

Note: When "Sign on docuPAD" is checked, the PDF will load to the docuPAD workstation Forms & Documents screen where it can be signed electronically. If this is not selected, the completed contract will automatically display in a separate window to be printed and processed as usual.

If there is any missing information required to properly book a product, the Additional Fields screen will prompt you to enter the necessary info. This screen is meant to capture required info that may be missing, as specified by the provider, so forms will be filled out correctly. It also ensures that providers have all necessary info to properly service the customer.

Once booked, the completed contract form automatically displays in a separate window in .pdf format. Information for the buyer, vehicle, and product is automatically entered on the form. You can then print the form for the buyer to sign, and process it as usual. Repeat this step for each contract you wish to book.

Provider/Product	Plan/Product	Rating Price	Rating Cost	Deal Price	Deal Cost	Contract#
Demo Tire And Wheel	Tire & Wheel	400.00	400.00	400.00	400.00	RYN00015818
emo GAP	GAP - All fields required	55.00	55.00	55.00	55.00	RYN00015817
Demo VSC	Gold Wrap	862.00	862.00			
	· · · ·		862.00	862.00	862.00	
ndurt Tune ESC1	Aftermarket Code		862.00	862.00	862.00	
roduct Type ESC1 riginal Rating Price (No Markup)	Aftermarket Code 862.00 Original Rating	1 Cost (No Pack)	002.00	862.00	862.00	

You can also book contracts by selecting **Display** > **VSC Rating and Products**. The VSC Rating and Products Display window displays a list of the rated products on the deal.

Note: If the label "Rating Only" displays for the provider on this window, the product must be booked with the provider outside of the Sales and F&I application

Voiding a Contract and Reprinting Forms

Provider/Product	Plan/Product	Rating Price	Rating Cost	Deal Price	Deal Cost	Contract#
Demo Tire And Wheel	Tire & Wheel	400.00	400.00	400.00	400.00	RYN00015818
Demo GAP	GAP - All fields required	55.00	55.00	55.00	55.00	RYN00015817
Demo VSC	Gold Wrap	862.00	862.00			
	,	002.00	862.00	862.00	862.00	
Product Type Aftermarket Driginal Rating Price (No Markup)	Aftermarket Code AF 400.00 Original Rating	T12	862.00	400.00	862.00	

If a buyer changes their mind about a product, you can easily void the contract directly from the VSC Rating and Products Display window by highlighting the product and clicking **Void Contract**.

Note: Contact providers directly for specific guidelines regarding voiding contracts.

You can reprint forms by highlighting the product and clicking **Reprint Contract**.

IMPORTANT

Remember to contact your provider(s) about their specific processes as some providers require additional steps to be taken in order to properly void contracts.

Build a Remittance Report

A Remittance Report can be built within the ERA-IGNITE Retail Management Intelligence (RMI) application. This report will show the contracts booked as well as the actual contract numbers. To build this report, complete the following steps.

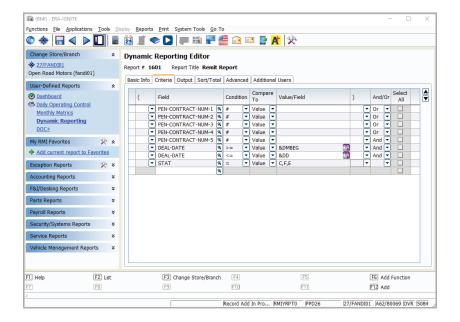
Step 1: Open the Retail Management Intelligence Application found under My Applications on the ERA-IGNITE homepage by simply clicking the icon found on your toolbar.

🛗 (RMI) - ERA-IGNITE						-		×
Functions Ele Applications	<u>T</u> ools <u>D</u> isplay <u>R</u> eports	Print System Tools Go To	b					
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Delete Dynamic Report		amic Reporting						
Undo All Changes		rts Completed Reports	Scheduled Reports					
Browse Forward	Ctrl+F	ria						
Browse Backward	Ctrl+B	PPD26	Owned By	S Re	port #	7		
Undo Current Field	Ctrl+Z		,			Run Since	E	
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Monthly Metrics Dynamic Reporting		-		Search (F5)	More	Select (F12)	Clear	-
DOC+	Add New Dynamic Report							
My RNI Favorites Add current report to Fav Exception Reports F&U/Desking Reports F&U/Desking Reports F&U/Desking Report F&U/Desking Report F&U/Desking Report Funding Report Funding Report Finance Reserve Analysis Report Inventory Analysis Report Unick Vehicle Advance Report Inventory Analysis Report Finance Report F	Delete File After Import	mple Reports	bbA]	(®) F12) Cancel	ch criteria			
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F7 F	8	F9 Add New	F10	F11		F12 Select		
>				RMILDRPT PPD	26 2	27/FANDI01 A62/8006	9 OVR 5	177

Step 2: Go to File > Add Dynamic Report. When the new screen appears, select Blank Report and then click Add (F12).

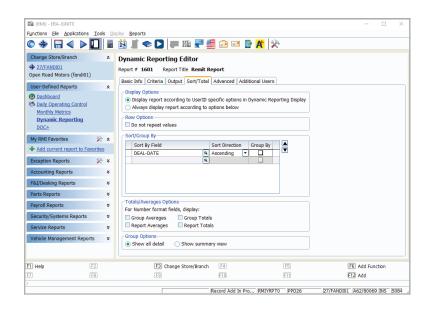
Note: You will need to be in the F&l store and branch where the remittance report is required.

Step 3: Name the report "Remit Report" and name the Data Set as "FIMAST-FANDI



Step 4: Select the following Criteria.

(RMI) - ERA-IGNITE unctions Elle Applications	Tools Dis	splay <u>R</u> eports <u>P</u> rint System To	ools	<u>G</u> o To					- 0	>
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Change Store/Branch	*	Dynamic Reporting Ed	itor	-						
27/FANDI01 Open Road Motors (fandi01)	Report # 1601 Report Title	Re	mit Report						
User-Defined Reports	*	Basic Info Criteria Output	Sort/	Total Advanced Additional Users						
Dashboard					Outpu	it Group			(-
Daily Operating Control		Field Column Title		Column Title	Width	dth Format		L/R	MV Option	^
Monthly Metrics		DEAL-NO	8	DEAL-NO	7			L		
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DOC+		B-NAME		BUYER NAME	60			L	-	
		STK-NO	9	STOCK #	8			L	-	
My RMI Favorites	* *	ID-NO		VIN	19			L	-	
Add current report to Fa	avorites	PEN-CONTRACT-NUM-1	9	CONTRACT 1	17			L	-	
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-		ORIG-RATE-COST-4	9	ORIG RATE COST 4	9	\$#,###.#	1# N	R 🖸	-	
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Service Reports	¥	Print Options								
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7	F8	F9		E10 (-11			F12 /	Add	
				Record Add In Pro RMIYRPT0	PPD26	07/		1 146	2/80069 INS	509



Step 5: Select the following Output.

Note: You can add other columns you would like to pull, such as MAKE.

- Step 6: Select the following Sort/Total.
- Step 7: Save the report by selecting Add (F12).
- Step 8: Run the Report by selecting Run Report (F10).

R

For assistance with report modification or information on how to rate and book your products, call **800.767.0080**. To view a detailed list of integrated providers, please visit: http://www.reyrey.com/rpp.





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