

F&I Product Rating and Booking

User Guide



Retail
Management
System

R Reynolds
& Reynolds™

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Setup and Registration

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.

Description	Permission	View Only	User Group
Additional Controls	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dealer and Product Registration	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pricing Controls	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

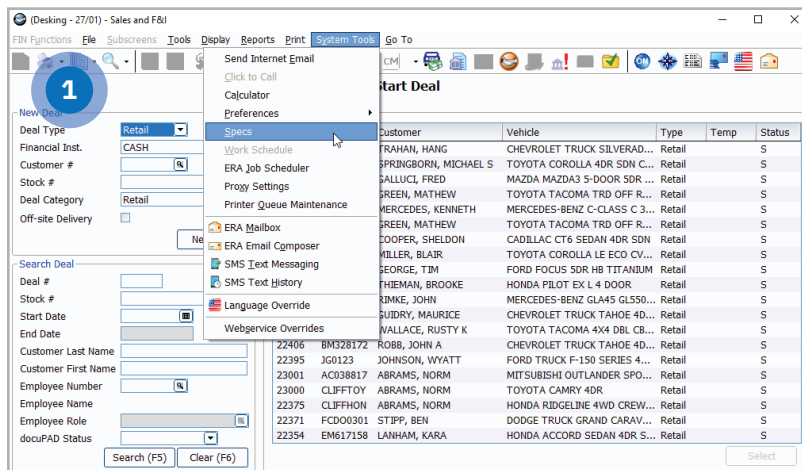
F&I/Desking → Screen Access

- ☒ VSC Rating and Product Display

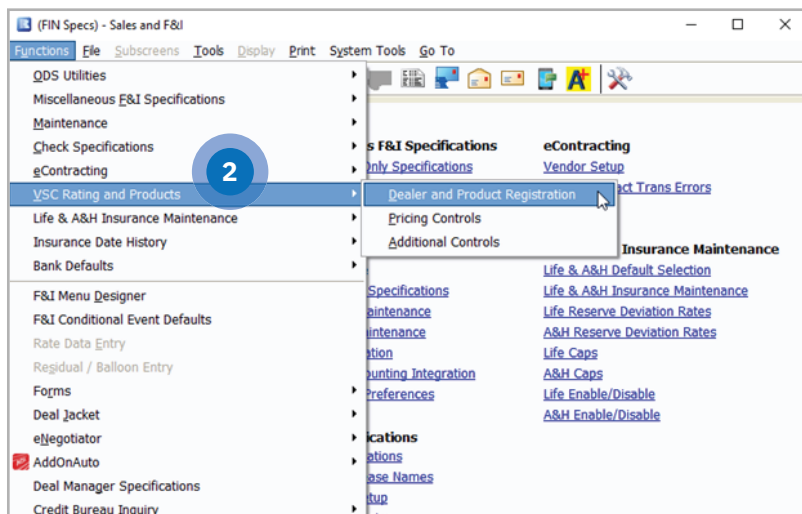
F&I/Desking → Aftersales – Fields

- ☒ VSC Original Rating Cost
(optional)

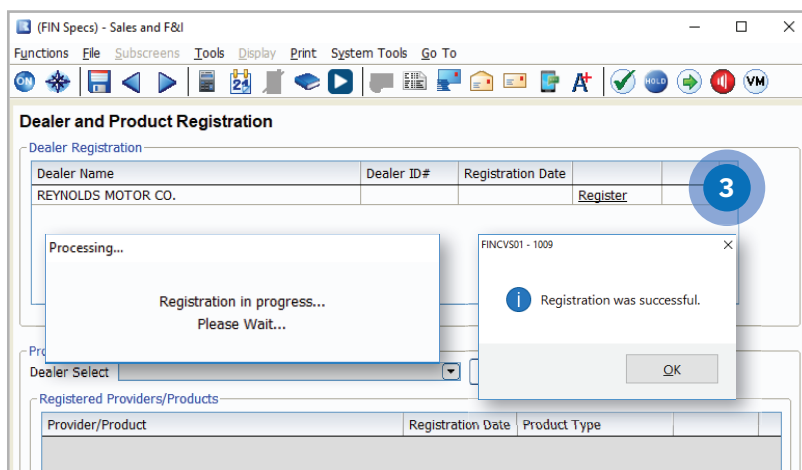
Step 1: Register your dealership



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



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



- 3 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.

Step 2: Register providers and products

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	Unregister	Update
ABC MOTORSPORTS	137076	11/09/16	Unregister	Update
TEST - OPEN ROAD MOTORS 2	112078	09/09/13	Unregister	Update

Provider and Product Registration

Dealer Select: **ABC MOTORSPORTS** [Register New Product](#)

Registered Providers/Products

Provider/Product	Registration Date	Product Type
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- 1 Use the down arrow next to Dealer Select to select dealership name. Click Register New Product.

Provider Selection

Select Providers for Registration

Provider	Provider ID
Accelerated Service Inter	78
Advanced Protection Produ	89
Advantage Product Pipelin	36
AFAS	24
Allstate	6
Ally (Vehicle One)	65
Alpha Warranty Services	9
American Auto Guardian	29
American Guardian	34
ANICO	26
ArmorAll	37
ASC Warranty	67
Assurance Plus	68
Audi Financial Services	97
AUL	101
Autoshield	3
	70

Processing...

Product request in progress... Please Wait...

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

Provider Selection

Select Providers for Registration

Provider	Provider ID
CNA	4
Continental Warranty	109
Crystal Fusion	118
CSCI	52
Dealer Admin Services	59
Dealer Maintenance	72
Dealers Choice	60
Demo Provider	35

Product	Provider Dealer ID	Product Code	Prefix Override	Status
<input checked="" type="checkbox"/> Demo GAP				
<input checked="" type="checkbox"/> Demo Paintless Dent Repair				
<input checked="" type="checkbox"/> Demo Theft Protection				
<input checked="" type="checkbox"/> Demo Tire And Wheel				
<input checked="" type="checkbox"/> Demo VSC				

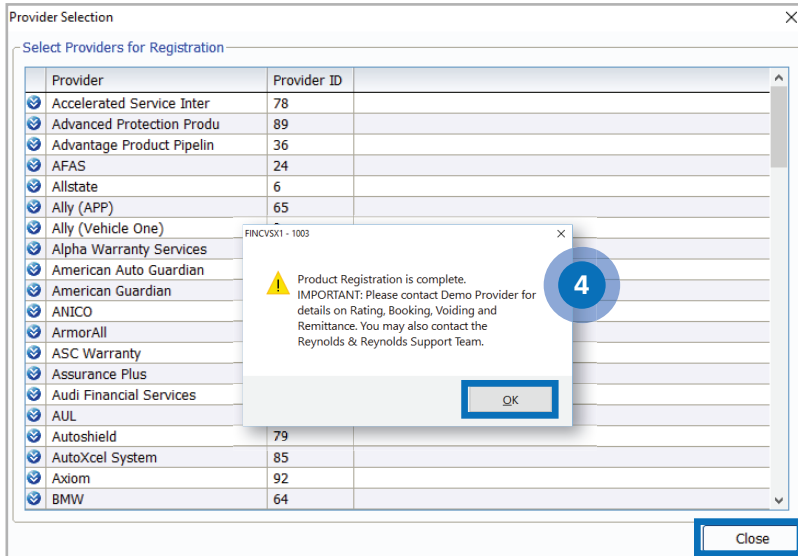
[Register \(F12\)](#) [Cancel](#)

Provider	Provider ID
Dent Wizard	74
Dent Wizard MV	20
Dent Zone	96
DentPro	121

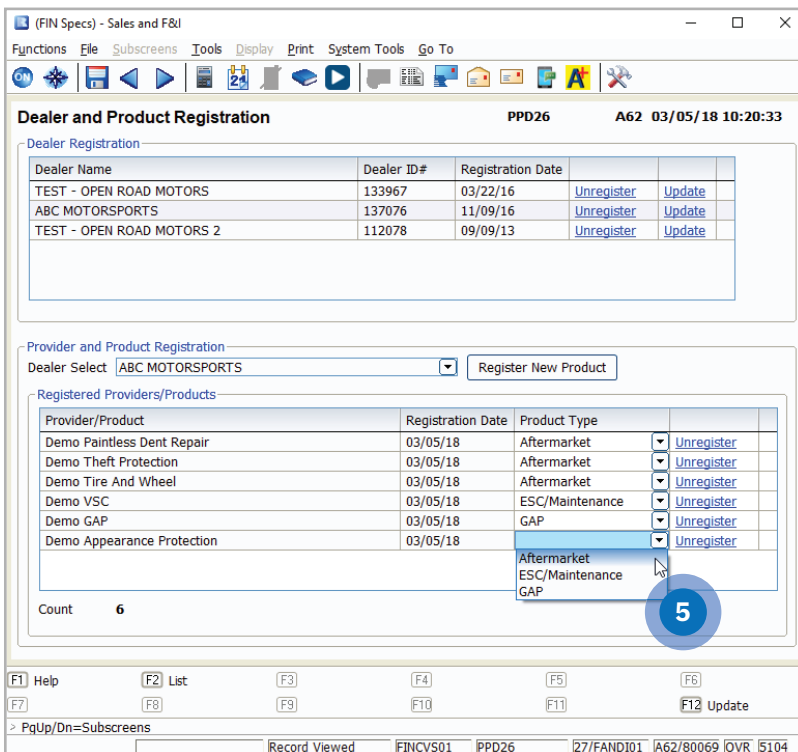
Close

- 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.



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



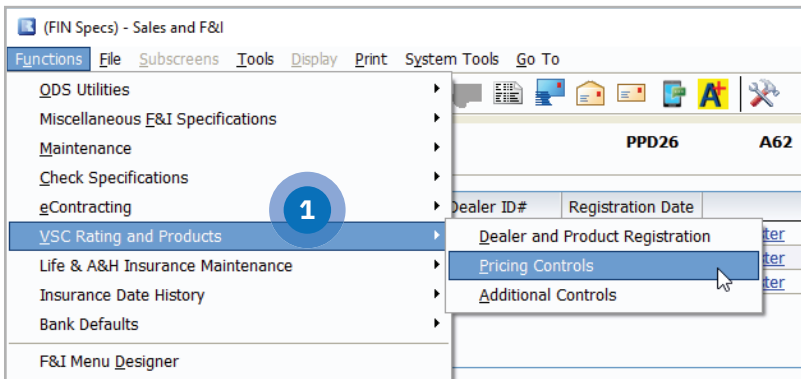
- 5 Select the Product Type by clicking on the drop down list next to each product that was registered. You can select Aftermarket, ESC/Maintenance, or GAP based on your processes.

IMPORTANT

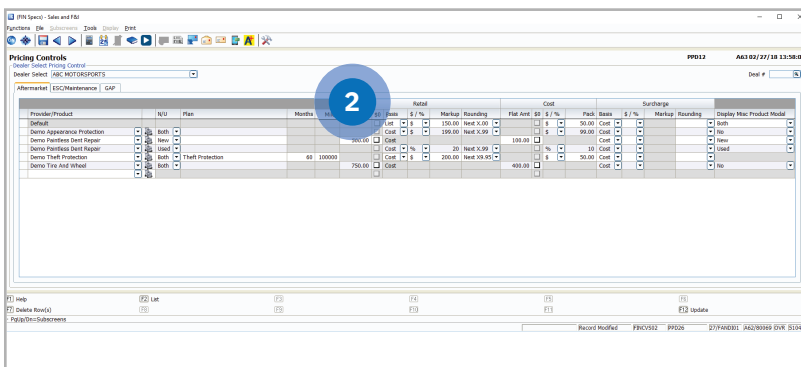
It is imperative that you contact your provider(s) for important information regarding their specific rating, booking, voiding, and remittance processes after you have successfully completed the registration process. Some providers require additional steps to be taken in order to properly rate, book,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



- 1 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.

(FIN Specs) - Sales and F&I

Functions File Subscreens Tools

Additional Controls PPD26 A62 01/3

Default Product

Dealer Select ABC MOTORSPORTS

	Preferred Product	Automatically Rate
Aftermarket	Demo Tire And Wheel	<input checked="" type="checkbox"/>
ESC 1	Demo VSC	<input type="checkbox"/>
ESC 2		<input type="checkbox"/>
Maintenance 1		<input type="checkbox"/>
Maintenance 2		<input type="checkbox"/>
GAP	Demo GAP	<input checked="" type="checkbox"/>

☐ Override Aftermarket Description with Provider Plan Description

F&I Menus

☐ Override Markup Rules

Save Product Price to ☒ Retail Price ☐ Sale Price

Unbooked Aftermarket Products

Spot Deliver Status Warning message

Close Deal Status Error message

3 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.

(FIN Specs) - Sales and F&I

Functions File Subscreens Tools Display

Aftermarket Product Maintenance

Code	Description	VSC Rating Provider	Tax	Profit	We Owe	Price \$0	Cost	Commiss
1 DEMO	APPEARANCE PROTECTION	Demo Appearance Protection	Yes	Back-End	No	0.00		
2 01	CAR CARE		Yes	Back-End	No	0.00		
3 02	WEAR & TEAR		Yes	Back-End	No	0.00		
4 04	TIRE AND WHEEL	Demo Tire And Wheel	Yes	Back-End	No	0.00		
5 12	ROAD HAZARD		Yes	Back-End	No	0.00		
6 AFT11	AFT 11		Yes	Back-End	Yes	0.00		
7 AFT12	TIRE & WHEEL		Yes	Back-End	No	0.00		
8 AFT13	WINDOW ETCH		Yes	Back-End	No	0.00		
9 AFT14	ADD-ON AUTO ACCESSORIES		Yes	Front-End	Yes	0.00		
10 AFT15	AFTMKT 15		No	Front-End	No	0.00		
11 AFT16	THEFT PROTECTION	Demo Theft Protection	No	Back-End	No	0.00		
12 AFT17	AFTMKT 17		No	Front-End	No	0.00		
13 AFT18	AFTMKT 18		No	Front-End	No	0.00		
14 AFT19	AFTMKT 19		No	Front-End	No	0.00		
15 AFT20	T&W		No	Front-End	No	0.00		
16 AFT21	PAINTLESS DENT REPAIR	Demo Paintless Dent Repair	Yes	Back-End	No	0.00		
17 AFT22	ADTMKT 22		No	Front-End	No	0.00		
18 AFT23	AFTMKT 23		No	Back-End	No	0.00		
19 AFT24	AFTMKT 24		No	Back-End	No	0.00		
20 AFT25	AFTMKT 25		No	Back-End	No	0.00		
21 AFT2	AFT 2		No	Back-End	No	0.00		35.00

4 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.

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.

Product and Rating Request

-Vehicle Information-

VIN: 1FTEX1CB3JF813119 Deal Date: 03/05/18 New/Used/Demo: New

Vehicle Description: 2018 FORD TRUCK F-150 2WD SUPERCAB

Odometer: 12 Rating In-Service Date: 03/05/2018

Used Vehicles: ☐ Active Manufacturer Vehicle Warranty ☐ Original Owner

-Product Information-

Product Type: ESC1

Provider/Product: Demo VSC

☒ Prompt Miscellaneous Product Option
☐ Use Retail Price in Deal

Plan	Deductible	Product Price	Surcharges	Price

Plan Name: Base Product Price: 0.00

Form Number: Selected Surcharges: 0.00

Limited Warranty: Total Product Price: 0.00

Provider Deductible Description

* = deductible is reduced to the listed price

** = deductible is reduced to zero

Get Pricing (F5) Save Product (F12) 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.

Miscellaneous Product Options

Surcharges

Surcharges

Miscellaneous

Rate Book Code:

Lender Code:

OK (F12) Cancel

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)**.

Product and Rating Request

-Vehicle Information-

VIN: 1FTEX1CB3JF813119 Deal Date: 03/05/18 New/Used/Demo: New

Vehicle Description: 2018 FORD TRUCK F-150 2WD SUPERCAB

Odometer: 12 Rating In-Service Date: 03/05/2018

Used Vehicles: ☐ Active Manufacturer Vehicle Warranty ☐ Original Owner

-Product Information-

Product Type: ESC1

Provider/Product: Demo VSC

☒ Prompt Miscellaneous Product Option

Plan	Deductible	Product Price	Surcharges	Price

Plan Name: Base Product Price: 0.00

Form Number: Selected Surcharges: 0.00

Limited Warranty: Total Product Price: 0.00

Provider Deductible Description

* = deductible is reduced to the listed price

** = deductible is reduced to zero

Get Pricing (F5) Save Product (F12) Cancel

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 1FTEK1CB3FB13119 Deal Date 03/05/18 New/Used/Demo New
Vehicle Description 2018 FORD TRUCK F-150 2WD SUPERCAB
Odometer 12 Rating In-Service Date 03/05/2018
Used Vehicles: ☐ Active Manufacturer Vehicle Warranty ☐ Original Owner

Product Information
Product Type ESC1 ☒ Prompt Miscellaneous Product Option
Provider/Product Demo VSC ☐ Use Retail Price in Deal

Plan	Deductible	Product Price	Surcharges	Price
Basic Wrap	<input checked="" type="checkbox"/> 0.00	1262.00	<input type="checkbox"/> 1 ton or greater	320.00
Bronze WEB	<input type="checkbox"/> 50.00	1062.00	<input type="checkbox"/> 4wd/4WD	300.00
Discountable Regulated Plan	<input type="checkbox"/> 100.00	862.00	<input type="checkbox"/> Commercial Use	300.00
Gold - New Vehicles	<input type="checkbox"/> 100.00/0.00**	662.00	<input type="checkbox"/> Diesel	75.00
Gold Wrap	<input type="checkbox"/> 200.00/50.00*	800.00	<input type="checkbox"/> Electronic High Tech	75.00
<input type="checkbox"/> 12/12000			<input type="checkbox"/> Hybrid	100.00
<input type="checkbox"/> 24/24000			<input type="checkbox"/> Seals & Gaskets (0-100,0...	50.00
<input checked="" type="checkbox"/> 36/36000			<input type="checkbox"/> Seals & Gaskets (100,00...	75.00
<input type="checkbox"/> 48/48000			<input type="checkbox"/> Technology Package	100.00
<input type="checkbox"/> 60/65000			<input type="checkbox"/> 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 Pricing (F5) **Save Product (F12)** Cancel

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

Package Item Properties

Item Settings Item Appearance Credit Disability

Vehicle Appearance Protection Package Item Settings

Item Name Vehicle Appearance Protection
Item Type AfterMarketItem
Aftermarket Code AFT13 - WINDOW ETCH
LAH Type
Plan Name
Months 0
Miles 0
Deductible 0.00
Retail Price 250.00
Discount 0.00
Sale Price 250.00
Cost 80.00

Premium Markup ☐ % ☒ \$
Minimum Markup 0.00
Maximum Markup 0.00

Maximum Discount ☐ % ☒ \$
Maximum Discount 0.00

Custom Tag 1
Custom Tag 2

Provider/Product Demo Appearance Protection
☒ Automatically Rate when Editor is selected

☒ Allow Runtime Editing
☒ Allow Price ☐ Allow Zero Price
☒ Allow Discount ☐ Allow Zero Cost
☒ Allow Cost ☐ Allow Zero Mileage
☐ Allow Warranty Data ☐ Allow Zero Months
☐ Allow Deductible ☐ Allow Custom Tag1
☐ Allow Custom Tag2

Presentation File

Item Description
Maintain showroom condition. Protects paint from bugs, tree sap, bird droppings and other pollutants. Protects interior fabric and leather from fading and stains


Decliner Statement

Disability Disclaimer

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.

ABC MOTORSPORTS

Guest: HANG TRAHAN, 1200 IRVING PLACE, SAINT CHARLES MO 63001
 Vehicle: 2018 FORD TRUCK F-150 2WD SUPERCAB, VIN: 1FTEX1C83JF813119, Miles: 12
 Date: 03/05/2018 1:22 PM
 Deal Number: 23798
 F&I Manager: [Blank]
 Base Payment: \$415.25
 Base Payment: \$357.84/72mo/4.4%

Amount Financed: 22566.25, Down Payment: 2000.00, Rate: 3.9, Total Rebate: [Blank]
 Sale Price: 22500.00, Term: 60, Net Trade: [Blank]

☒ Preferred ☐ Value ☐ Basic ☐ Economy

Vehicle Service Contract
 Pays costs of parts and labor on covered repairs for 36 months or 36,000 miles, with a \$0.00 deductible. \$1262.00/(\$423.22/mh)

GAP Protection
 Pays difference between actual cash value and loan balance if your vehicle is declared a total loss due to theft or collision. \$813.52/(\$27.10/mh)

Vehicle Appearance Protection
 Maintain showroom condition. Protects paint from bugs, tree sap, bird droppings and other pollutants. Protects interior fabric and leather from fading and stains. \$400.00/(\$7.36/mh)

Window Etch
 Window etch deters professional vehicle theft. \$299.00

Package Total Price: \$1662.00, Package Discount: \$0.00, Package Price: \$1662.00
 Terms: 60, Rate: 3.9, Customer Initials: [Blank]

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**.

Vehicle Appearance Protection Editor

Vehicle Appearance Protection

Aftermarket: AFTMKT 13, Custom Tag 1: [Blank]
 Aftermarket Code: AFT13, Custom Tag 2: [Blank]
 Retail Price: 250.00
 Discount: 0.00
 Sale Price: 250.00
 Cost: 80.00

☐ Apply to All Package Items

Get Pricing (F5) **OK** **Cancel**

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

Product and Rating Request

Vehicle Information
 VIN: 1FTEX1C83JF813119, Deal Date: 03/05/18, New/Used/Demo: New
 Vehicle Description: 2018 FORD TRUCK F-150 2WD SUPERCAB
 Odometer: 12, Rating In-Service Date: 03/05/2018
 Used Vehicles: ☐ Active Manufacturer Vehicle Warranty ☐ Original Owner

Product Information
 Product Type: Aftermarket, Aftermarket Code: AFT13
 Provider/Product: Demo Appearance Protection
☒ Prompt Miscellaneous Product Option
☐ Use Retail Price in Deal

Product	Price	Deductible	Product Price	Surcharges	Price
Appearance Protection	325.00	50.00	525.00		
<input type="checkbox"/> 12/12000	425.00				
<input checked="" type="checkbox"/> 24/24000	525.00				
<input type="checkbox"/> 36/36000					

Plan Name: Appearance Protection, Form Number: DAP DemoForm_APPEARANCE
 Base Product Price: 525.00, Selected Surcharges: 0.00, Total Product Price: 525.00

Provider Deductible Description: \$50
 * = deductible is reduced to the listed price
 ** = deductible is reduced to zero

Get Pricing (F5) **Save Product (F12)** **Cancel**

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

Customize Deal Menu - 28761 - TRAHAN, HANG (Denny's Menu)

Finance Option 1 Term 36 Pmts/Yr 3 Rate 2.9 Base Payment 1 884.32
 Finance Option 2 Term Pmts/Yr Rate Base Payment 2 N/A

AfterSales and Aftermarket Review

Denny 1	Denny 2	Denny 3	Denny 4
Dent Restore Plus - 3 Years Retail Price 100.00 Months 36 Deductible 0.00 Cost 50.00 Replace Select Coverage	OwnerShield Retail Price 1.00 Months 0 Miles 0 Deductible 0.00 Cost 0.01 Select Coverage	Tender Loving Care - Platinum Retail Price 566.33 Months 0 Miles 0 Deductible 0.00 Cost 0.00 Replace Select Coverage	Combo CLAH test Retail Price 0.00 Cost 0.00 Replace Select Coverage
Key Replacement - Standard Retail Price 399.00 Months 36 Miles 0 Deductible 0.00 Cost 199.00 Replace Select Coverage	ABSOLUTE Tire & Rim Protecti... Retail Price 199.00 Months 36 Miles 79.00 Deductible 0.00 Cost 0.00 Select Coverage	Ford Protection Plan - Basic G... Retail Price 0.00 Months 0 Miles 0 Deductible 50.00 Cost 0.00 Replace Select Coverage	Allied GAP - GAP Retail Price 0.00 Months 0 Miles 0 Deductible 0.00 Cost 465.00 Replace Select Coverage
Tire & Wheel Protection - Pro... Retail Price 0.00 Months 36 Miles 0 Deductible 0.00 Cost 0.00 Replace Select Coverage	AFTERMARKET 1 - AFT1 Retail Price 200.00 Months 11 Miles 11000 Deductible 111.00 Cost 20.00 Select Coverage	Car Care Upgrade - Elite Non ... Retail Price 349.00 Months 0 Miles 0 Deductible 0.00 Cost 0.00 Replace Select Coverage	
Theft Protection - Road Hazar... Retail Price 0.00 Months 0 Miles 0 Deductible 0.00 Cost 0.00 Replace Select Coverage	Service Maintenance Agreeem... Retail Price 0.00 Months 0 Miles 0 Deductible 0.00 Cost 0.00 Replace Select 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.

Product and Rating Request

Vehicle Information
 VIN 1FTEX1CB3JF813119 Deal Date 03/05/18 New/Used/Demo New
 Vehicle Description 2018 FORD TRUCK F-150 2WD SUPERCAB
 Odometer 12 Rating In-Service Date 03/05/2018
 Used Vehicles: ☐ Active Manufacturer Vehicle Warranty ☐ Original Owner

Product Information
 Product Type ESC1 ☒ Prompt Miscellaneous Product Option
 Provider/Product Demo VSC ☐ Use Retail Price in Deal

Plan	Deductible	Product Price	Surcharges	Price

Plan Name Base Product Price 0.00
 Form Number Selected Surcharges 0.00
 Limited Warranty Total Product Price 0.00

Provider Deductible Description
 * = deductible is reduced to the listed price
 ** = deductible is reduced to zero

Get Pricing (F5) Save Product (F12) Cancel

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.

Product and Rating Request

Vehicle Information
 VIN 1FTEX1CB3JF813119 Deal Date 03/05/18 New/Used/Demo New
 Vehicle Description 2018 FORD TRUCK F-150 2WD SUPERCAB
 Odometer 12 Rating In-Service Date 03/05/2018
 Used Vehicles: ☐ Active Manufacturer Vehicle Warranty ☐ Original Owner

Product Information
 Product Type ESC1 ☒ Prompt Miscellaneous Product Option
 Provider/Product Demo VSC ☐ Use Retail Price 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	Commercial Use	300.00
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
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

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 Pricing (F5) Save Product (F12) Cancel

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 TEST 02/13/2017

Coverages

Available Coverages

Coverages: COVERAGE1

Deductibles

Terms

Selected Coverage

Retail Price 756.00

Cost 756.00

Deductible

Expiration Date 03/05/2023

Months 60

Miles 60000

Rated

Product Rating and Booking Selected Coverage

Plan Name VSC Gold (H)

Terms 60/60000

PRODUCT TEST 02/13/2017

Coverages

Available Coverages

Coverages: COVERAGE2

Deductibles

Terms

Selected Coverage

Retail Price 756.00

Cost 756.00

Deductible

Expiration Date 03/05/2023

Months 60

Miles 60000

Rated

Coverage changed after Product was Rated. Check Selected Coverage values.

AddOns

AddOns

ADDON 1

ADDON 2

ADDON 3

ADDON 4

ADDON 5

ADDON 6

Product Rating and Booking Selected Coverage

Plan Name VSC Gold (H)

Terms 60/60000

Get Pricing (F5) Save to all options Save to this option Cancel

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.

PRODUCT TEST 02/13/2017

Coverages

Available Coverages

Coverages: COVERAGE1

Deductibles

Terms

Selected Coverage

Retail Price 756.00

Cost 756.00

Deductible

Expiration Date 03/05/2023

Months 60

Miles 60000

Rated

Product Rating and Booking Selected Coverage


Plan Name VSC Gold (H)

Terms 60/60000

Get Pricing (F5) Save to all options Save to this option Cancel

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.

Customize Deal Menu - 28761 - TRAHAN, HANG (Denny's Menu)

Finance Option 1 Term 36 Pmts/Yr 3 Rate 2.9 Base Payment 1 884.32

Finance Option 2 Term Pmts/Yr Rate Base Payment 2 N/A

AfterSales and Aftermarket Review

Denny 1	Denny 2	Denny 3	Denny 4
Dent Restore Plus - 3 Years	OwnersShield	Tender Loving Care - Platinum	Combo CLAH test
Retail Price 100.00	Retail Price 1.00	Retail Price 566.33	Retail Price 0.00
Months 36	Months 0	Months 0	Months 0
Miles 0	Miles 0	Miles 0	Miles 0
Deductible 0.00	Deductible 0.00	Deductible 0.00	Deductible 0.00
Cost 50.00	Cost 0.01	Cost 0.00	Cost 0.00
Replace Select Coverage	Replace Select Coverage	Replace Select Coverage	Replace Select Coverage
Key Replacement - Standard	ABSOLUTE Tire & Rim Protect...	Ford Protection Plan - Basic G...	Allied GAP - GAP
Retail Price 399.00	Retail Price 199.00	Retail Price 0.00	Retail Price 0.00
Months 36	Months 36	Months 0	Months 0
Miles 0	Miles 79.00	Miles 0	Miles 0
Deductible 0.00	Deductible 0.00	Deductible 50.00	Deductible 0.00
Cost 199.00	Cost 20.00	Cost 0.00	Cost 465.00
Replace Select Coverage	Replace Select Coverage	Replace Select Coverage	Replace Select Coverage
Tire & Wheel Protection - Pro...	AFTERMARKET 1 - AFTI	Car Care Upgrade - Elite1 Non ...	
Retail Price 165.00	Retail Price 200.00	Retail Price 349.00	
Months 36	Months 11	Months 0	
Miles 0	Miles 11000	Miles 0	
Deductible 0.00	Deductible 111.00	Deductible 0.00	
Cost 165.00	Cost 20.00	Cost 0.00	
Replace Select Coverage	Replace Select Coverage	Replace Select Coverage	
Theft Protection - Road Hazar...	Service Maintenance Agree...		
Retail Price 0.00	Retail Price 0.00		
Months 0	Months 0		
Miles 0	Miles 0		
Deductible 0.00	Deductible 0.00		
Cost 0.00	Cost 0.00		
Replace Select Coverage	Replace Select Coverage		
PRODUCT TEST 02/13/2017 - ...			
Retail Price 756.00			

Rating from docuPAD – Menu of Options

Menu of Options (Edit Package Terms) Transaction Type: NEW CAR LOAN

Denny 1	Denny 2	Denny 3	Denny 4
Dent Restore Plus - 3 Years \$100 (\$3/pm) 36 months / 0 deductible [Edit]	OwnerShield \$1 (\$0/pm) 0 deductible [Edit]	Tender Loving Care - Platinum \$500 (\$10/pm) 0 deductible [Edit]	Combo CLAH test \$0 (\$0/pm) [Edit]
Key Replacement - Standard \$200 (\$10/pm) 0 deductible [Edit]	ABSOLUTE Tire & Rim Protection - 3 Years \$199 (\$7/pm) 36 months [Edit]	Ford Protection Plan - Basic Guard \$0 (\$0/pm) 50 deductible [Edit]	Allied GAP - GAP \$0 (\$0/pm) 0 deductible [Edit]
Tire & Wheel Protection - Protect Tires Only \$165 (\$5/pm) 36 months [Edit]	AFTERMARKET 1 - AFT1 \$200 (\$7/pm) 11 months / 11000 miles / 111 deductible [Edit]	Car Care Upgrade - Elite1 \$349 (\$11/pm) Non Syn 0 deductible [Edit]	
Theft Protection - Road Hazard Coverage \$0 (\$0/pm) [Edit]	Service Maintenance Agreement Winegardner - Service Maintenance Agreement \$0 (\$0/pm) [Edit]		
PRODUCT TEST 02/13/2017 - COVERAGE1 60 months / 60000 miles / 0 deductible [Edit]			

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.

Product Editor

Dent Restore Plus - [3 Years] 100.00

RA23PL1173NA (10/06)

Coverage: 3 Years [Rated]

Term: 36 Months

Deductible: 0

Keycode: [Numeric Keypad]

[Cancel] [Clear] [OK]

[Cancel] [Reset] **[Get Product Rating]** [Save to This Package] [Save to All Packages]

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

Product Rating Request

Odometer: 15 Rating In-Service Date: 03/05/18 NEW 2018 FORD TRUCK F-150 2WD SUPERCAB VIN: 1FTEX1CB3JFB13119 Deal Date: 03/05/18

☐ Active Manufacturer Vehicle Warranty (Used Vehicle)
☐ Original Owner (Used Vehicle)
☒ Prompt Miscellaneous Product Option Screen

Dent Restore Plus

Product Information
 Provider/Product: <Select One>
 Product: --Press Get Pricing-- Coverage: ----

Deductible	Product Price	Surcharges	Price

Plan Name: N/A Form Number: N/A

Base Product Price: \$0.00
 Selected Surcharges: \$0.00
 Total Product Price: \$0.00

Provider Deductible Description: N/A
 * = deductible is reduced to the list price
 ** = deductible is reduced to zero

[Cancel] **[Get Pricing]** [Save Product]

Step 3: Click **Get Pricing** to rate the product.

Product Rating Request

Odometer: 15 Rating In-Service Date: 03/05/18 31 NEW 2018 FORD TRUCK F-150 2WD SUPERCAB
VIN: 1FTEX1CB3JFB13119 Deal Date: 03/05/18

☐ Active Manufacturer Vehicle Warranty (Used Vehicle)
☐ Original Owner (Used Vehicle)
☒ Prompt Miscellaneous Product Option Screen

Dent Restore Plus

Product Information

Provider/Product: <Select One>

Product: --Press Get Pricing-- Coverage: ----

Deductible	Product Price	Surcharges	Price

Plan Name: N/A
 Form Number: N/A

Base Product Price: \$0.00
 Selected Surcharges: \$0.00
 Total Product Price: \$0.00

Provider Deductible Description: N/A
 * = deductible is reduced to the list price
 ** = deductible is reduced to zero

Cancel Get Pricing **Save Product**

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

Product Editor

Dent Restore Plus - [3 Years] 165.00

RA23PL1173NA (10/06)

Coverage: 3 Years ✓ Rated

Term: Months 36

Deductible: Deductible 0.00

Product Rating Selected Coverage:

Plan Name: Road Hazard & Tire with Rental
Terms: 36

Keycode:

Cancel Clear OK

Cancel Reset Get Product Rating **Save to This Package** **Save to All Packages**

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.

Product Booking and Printing

F&I Forms

SmartForms | F&I Forms Menu

Dealer Description

Standard Description

#	Dealer Description	Type	Status	Custom	Category	Preview	Void	Misc. dP
<input type="checkbox"/>	65 WELLS FARGO CONT-OH (03/02)	Impact			NONE			
<input type="checkbox"/>	243 WE OWE FORM (NO REV)	Impact			MISCELLANEOUS			
<input type="checkbox"/>	3 WE OWE (11/95)	Laser			MISCELLANEOUS			
<input type="checkbox"/>	349 WE OWE (03/13)	docuPAD			MISCELLANEOUS	Preview		First Form
<input type="checkbox"/>	72 VA TITLE APP (12/05)	Laser			STATE FORMS/TITLE APP...			
<input type="checkbox"/>	4 VA REGISTRATION APP (07/05)	Laser			STATE FORMS/TITLE APP...			
<input type="checkbox"/>	102 VA BUYERS ORDER-M (NO REV)	Laser			MISCELLANEOUS			
<input type="checkbox"/>	101 VA BUYERS ORDER-A (01/02)	Laser			MISCELLANEOUS			
<input type="checkbox"/>	57 US BANK CONTRACT-OH (01/02)	Impact			RETAIL CONTRACT			
<input type="checkbox"/>	15 US BANK ATP	Impact			AGREEMENT TO PROVIDE ...			
<input type="checkbox"/>	258 UNITED CAR CARE VIPCA-WA (07/05)	Impact			ESC/WARRANTY			
<input type="checkbox"/>	201 TX TT/PMT VERIFICATION (08/05)	Impact			STATE FORMS/TITLE APP...			
<input type="checkbox"/>	200 TX TT/PMT VERIFICATION (01/05)	Impact			STATE FORMS/TITLE APP...			
<input type="checkbox"/>	199 TX TT/PMT VERIF (10/00)	Impact			STATE FORMS/TITLE APP...			
<input type="checkbox"/>	206 TX TRADE3 POA-PDF (11/09) DP	docuPAD			STATE FORMS/TITLE APP...	Preview		
<input type="checkbox"/>	205 TX TRADE2 POA-PDF (11/09) DP	docuPAD			STATE FORMS/TITLE APP...	Preview		
<input type="checkbox"/>	204 TX TRADE1 POA-PDF (11/09) DP	docuPAD			STATE FORMS/TITLE APP...	Preview		
<input type="checkbox"/>	141 TX TITLE ISSUE CNTY-PDF(02/11)	Impact			STATE FORMS/TITLE APP...			
<input type="checkbox"/>	140 TX TITLE APP-PDF (05/12)	Impact			STATE FORMS/TITLE APP...			
<input type="checkbox"/>	202 TX TITLE APP-PDF (04/11)	Impact			STATE FORMS/TITLE APP...			
<input type="checkbox"/>	203 TX SOLD POA-PDF (11/09) DP	docuPAD			STATE FORMS/TITLE APP...	Preview		

☐ Skip Hidden Prompts

☐ Display docuPAD Forms Only

Refresh (F5)

Prepare docuPAD Forms (F8)

Print (F10)

Print Queue

☐ Select All Forms

☐ Print All Impact/DP Forms as docuPAD

☐ Print All Pages (docuPAD only)

Print dP Copies

Print Queue

Product Booking and Reprint

RouteOne eContract Forms

Provider/Product	Plan/Product	Contract	Provider Status	docuPAD
<input type="checkbox"/> Demo Appearance...	Appearance Protection			
<input type="checkbox"/> Demo GAP	GAP - All fields required			
<input type="checkbox"/> Demo VSC	Gold - New Vehicles			

☐ Sign on docuPAD

☐ Select Unbooked

Book Contract (F9)

Additional Fields for Contract Booking

Additional Fields	Enter Additional Data
Enter the Tire Size	
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.

VSC Rating and Products Display

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	862.00	862.00	

Product Type **ESC1** Aftermarket Code

Original Rating Price (No Markup) **862.00** Original Rating Cost (No Pack) **862.00**

Date Saved **03/05/18 14:20:57** Date Booked Date Voided

Book Contract Void Contract Close

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

VSC Rating and Products Display

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	862.00	862.00	

Product Type **Aftermarket** Aftermarket Code **AFT12**

Original Rating Price (No Markup) **400.00** Original Rating Cost (No Pack) **400.00**

Date Saved **03/05/18 14:19:46** Date Booked **03/05/18 14:23:42** Date Voided

Reprint Contract **Void Contract** Close

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**.

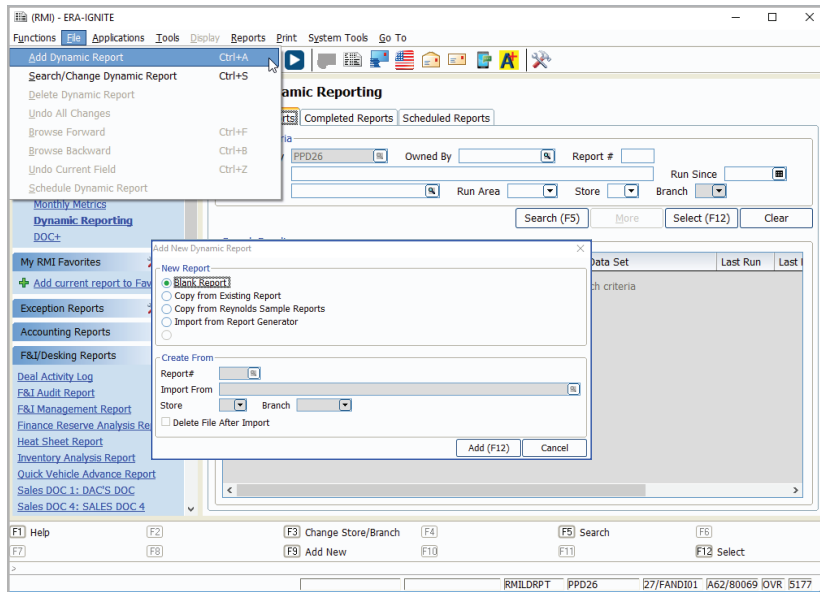
IMPORTANT

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.

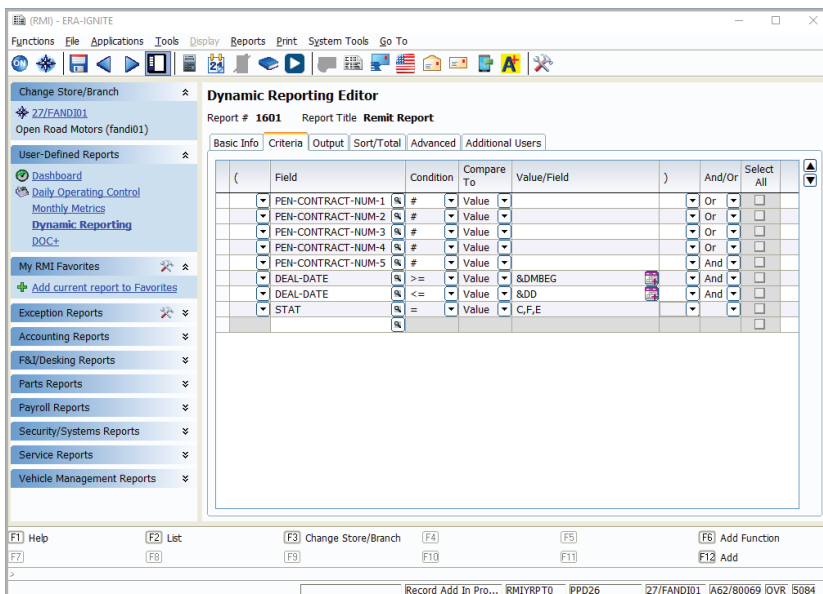
Step 1: Open the Retail Management Intelligence Application found under My Applications on the ERA-IGNITE homepage by simply clicking the  icon found on your toolbar.



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&I** 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.

Dynamic Reporting Editor
Report # 1601 Report Title Remit Report

Basic Info Criteria **Output** Sort/Total Advanced Additional Users

Output Group

Field	Column Title	Width	Format	L/R	MV Option
DEAL-NO	DEAL-NO	7		L	
DEAL-DATE	DEAL DATE	10	MM/DD/YY	R	
B-NAME	BUYER NAME	60		L	
STK-NO	STOCK #	8		L	
ID-NO	VIN	19		L	
PEN-CONTRACT-NUM-1	CONTRACT 1	17		L	
ORIG-RATE-COST-1	ORIG RATE COST 1	9	###.##	R	
PEN-CONTRACT-NUM-2	CONTRACT 2	17		L	
ORIG-RATE-COST-2	ORIG RATE COST 2	9	###.##	R	
PEN-CONTRACT-NUM-3	CONTRACT 3	17		L	
ORIG-RATE-COST-3	ORIG RATE COST 3	9	###.##	R	
PEN-CONTRACT-NUM-4	CONTRACT 4	17		L	
ORIG-RATE-COST-4	ORIG RATE COST 4	9	###.##	R	
PEN-CONTRACT-NUM-5	CONTRACT 5	17		L	
ORIG-RATE-COST-5	ORIG RATE COST 5	9	###.##	R	

Print Options
Header Line
Footer Line

F1 Help F2 Lookup F3 Change Store/Branch F4 F5 F6 Add Function
F7 F8 F9 F10 F11 F12 Add

Record Add In Pro... RMYRPT0 PPD26 27/FAND001 A62/80069 INS 5084

Step 5: Select the following Output.

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

Dynamic Reporting Editor
Report # 1601 Report Title Remit Report

Basic Info Criteria Output **Sort/Total** Advanced Additional Users

Display Options
☒ Display report according to UserID specific options in Dynamic Reporting Display
☐ Always display report according to options below

Row Options
☐ Do not repeat values

Sort/Group By

Sort By Field	Sort Direction	Group By
DEAL-DATE	Ascending	

Totals/Averages Options
For Number format fields, display:
☐ Group Averages ☐ Group Totals
☐ Report Averages ☐ Report Totals

Group Options
☒ Show all detail ☐ Show summary view

F1 Help F2 Lookup F3 Change Store/Branch F4 F5 F6 Add Function
F7 F8 F9 F10 F11 F12 Add

Record Add In Pro... RMYRPT0 PPD26 27/FAND001 A62/80069 INS 5084

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)**.

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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