

# F&I Product Rating and Booking

User Guide



Retail  
Management  
System

**R** Reynolds  
& Reynolds™

**Setup and Registration**

Setup and Registration ..... 1

Step 1: Register your dealership ..... 2

Step 2: Register providers and products ..... 3–5

Step 3: Set Product Integration Controls for pricing and profit information by product ..... 6-7

**Rating and Booking**

Product Rating ..... 8

Rating from a deal record in Finance and Insurance ..... 8–9

Rating from F&I Menu Selling Presentations ..... 10–11

Product Booking and Printing from Finance and Insurance ..... 12–13

Rating from docuPAD – Customize Deal Menu ..... 14–15

Rating from docuPAD – Menu of Options ..... 15–17

Booking and Printing from docuPAD Deal Processes ..... 18–19

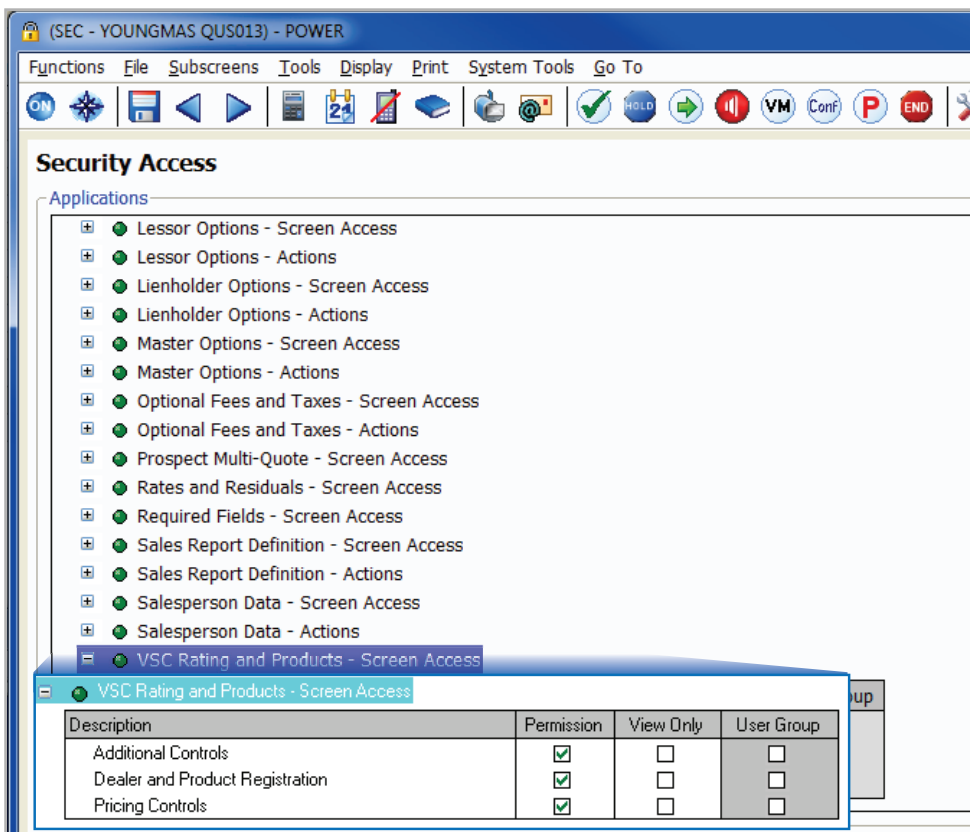
# Setup and Registration

POWER

Reynolds and Reynolds' Product Rating and Booking is available for 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 Options to perform registration activities. This guide will outline how to set up security access for this.**



Control Options – Finance and Insurance → VSC Rating and Product – Screen Access

- ☒ Dealer and Product Registration
- ☒ PricingControls
- ☒ Additional Controls

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

Finance and Insurance → Screen Access

- ☒ VSC Rating and Product Display

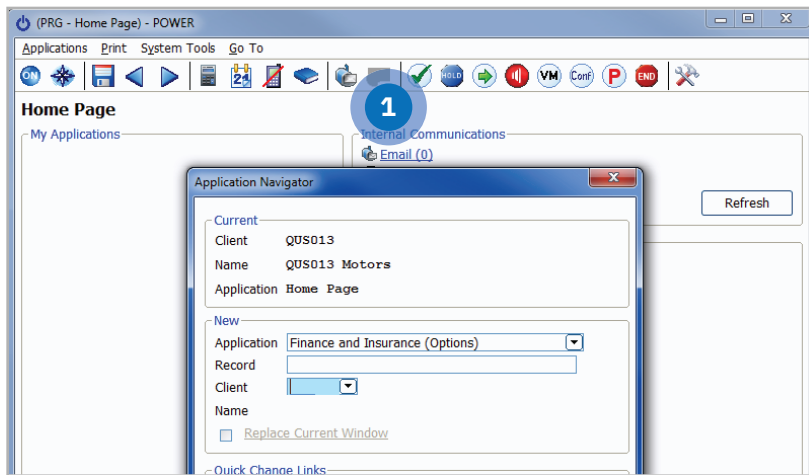
Finance and Insurance → Actions

- ☒ Book/Void PEN Contracts
- ☒ Obtain VSC Rating
- ☒ VSC Original Rating Cost (optional)

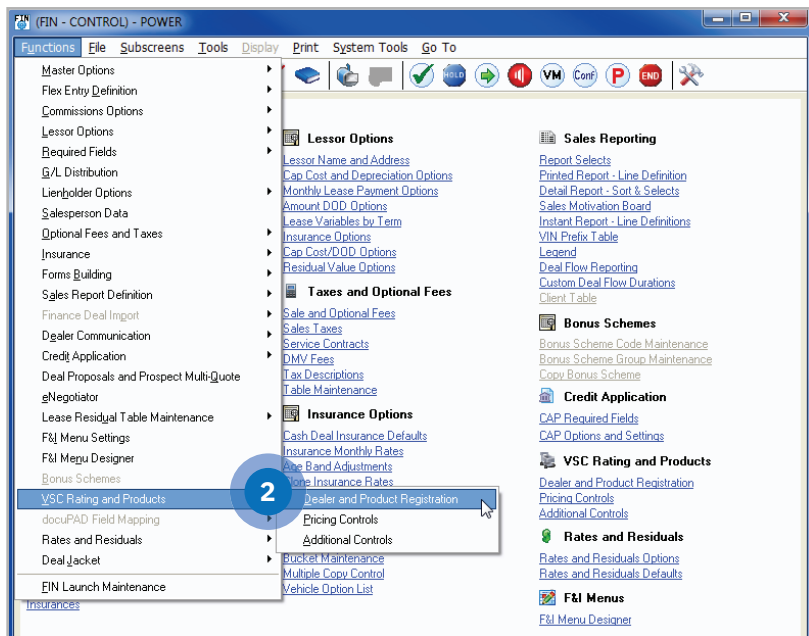
docuPAD Management → Screen Access

- ☒ VSC Rating and Products Display

## Step 1: Register your dealership

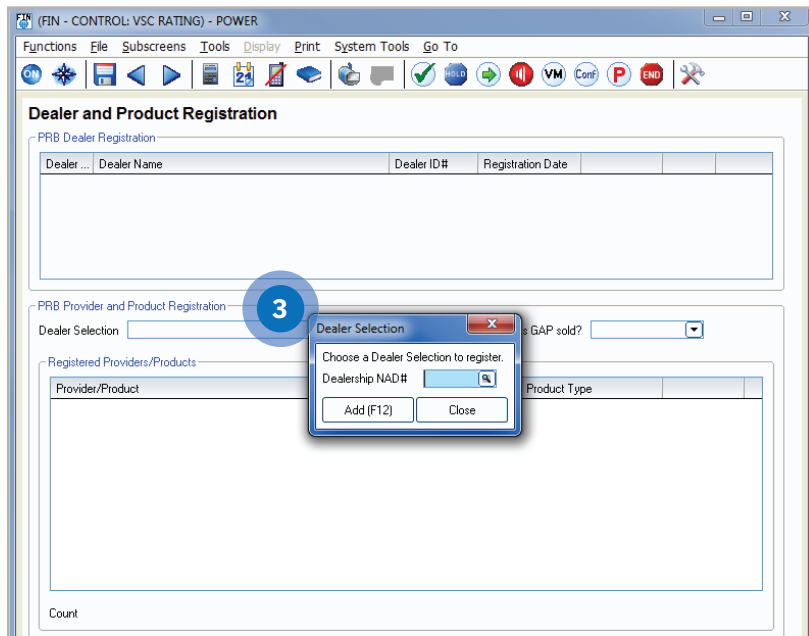


- 1 From the POWER Home Page, click the **Application Navigator Icon** → **Select Finance and Insurance (Options)** → **Open (F12)**



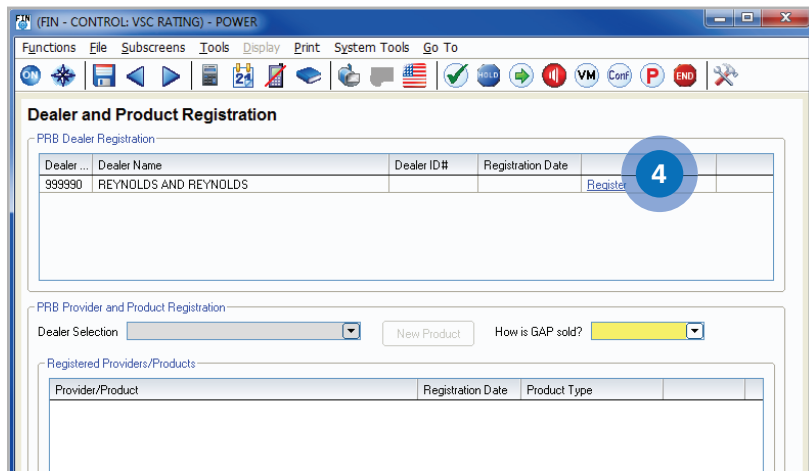
- 2 From the Finance and Insurance (Options) screen click **Functions** → **VSC Rating and Products** → **Dealer and Product Registration**.

## Step 2: Register providers and products



The screenshot shows the 'PRB Dealer and Product Registration' window. A 'Dealer Selection' dialog box is open, prompting the user to 'Choose a Dealer Selection to register.' and enter a 'Dealership NAD#'. The dialog has 'Add (F12)' and 'Close' buttons. In the background, the 'PRB Dealer Registration' table is visible with columns for Dealer, Dealer Name, Dealer ID#, and Registration Date. The 'PRB Provider and Product Registration' section below has a 'Dealer Selection' dropdown and a 'New Product' button. The 'Registered Providers/Products' table has columns for Provider/Product, Registration Date, and Product Type.

- 3 Enter the **Dealership NAD#** you are registering your products for.



The screenshot shows the 'PRB Dealer and Product Registration' window. The 'PRB Dealer Registration' table now contains one entry: Dealer 999990, Dealer Name REYNOLDS AND REYNOLDS. The 'Register' button is highlighted with a blue circle and the number 4. The 'PRB Provider and Product Registration' section shows the 'Dealer Selection' dropdown set to the selected dealer. The 'Registered Providers/Products' table is empty.

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

## Step 2: Register providers and products

PRB Dealer Registration

Dealer ...	Dealer Name	Dealer ID#	Registration Date		
999990	REYNOLDS AND REYNOLDS	140217	01/02/19	Unregister	Update

PRB Provider and Product Registration

Dealer Selection: 999990 - REYNOLDS AND REYNOLDS

New Product

How is GAP sold? Insurance

Registered Providers/Products

Provider/Product	Registration Date	Product Type
------------------	-------------------	--------------

- 5 Use the down arrow next to **How is GAP Sold?** to choose the item used for selling GAP. Click **New Product**.

Provider Selection

Select Providers for Registration

Provider	Provider ID
<input checked="" type="checkbox"/> Classic	19
<input checked="" type="checkbox"/> CNA	4
<input checked="" type="checkbox"/> Complete Warranty	109
<input checked="" type="checkbox"/> Complete United	125
<input checked="" type="checkbox"/> Complete Fusion	118
<input checked="" type="checkbox"/> CSCI	52
<input checked="" type="checkbox"/> Dealer Admin Services	59
<input checked="" type="checkbox"/> Dealer Maintenance	72
<input checked="" type="checkbox"/> Dealers Choice	60
<input checked="" type="checkbox"/> Demo JM&A	105
<input checked="" type="checkbox"/> Demo Provider	35

Product	Provider Dealer ID	Product Code	Prefix Override	Status
<input checked="" type="checkbox"/> Demo Appearance Protection				
<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				

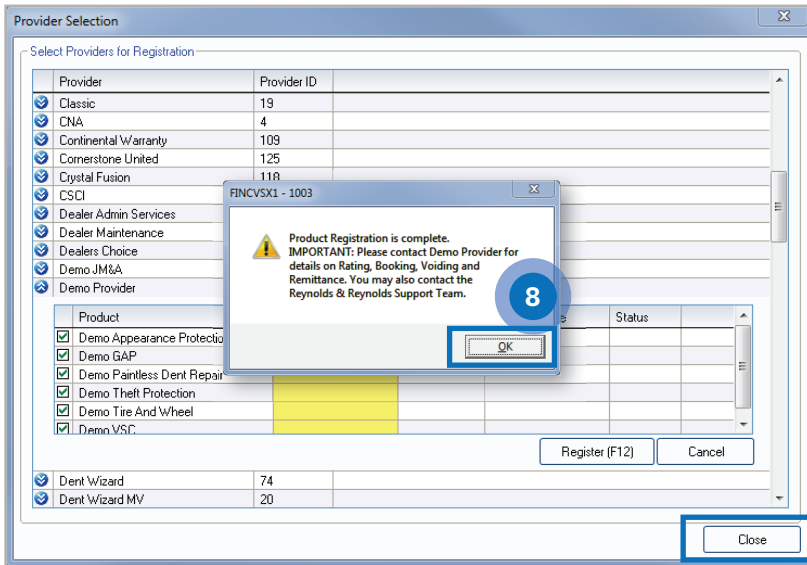
Register (F12) Cancel

- 6 Click the double arrow on the left to choose products to register from providers with which your dealership has an existing relationship.
- 7 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)**.

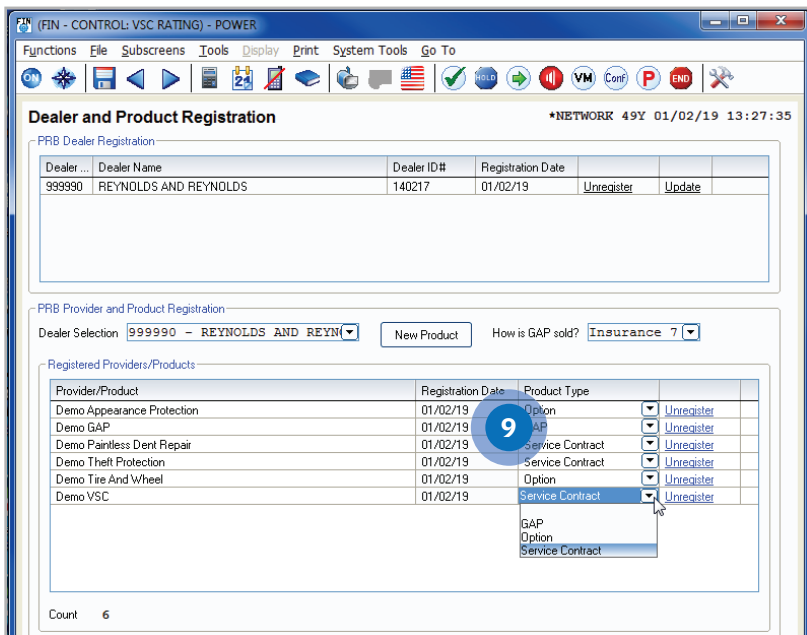
Repeat steps 2 and 3 for each provider.

**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.**





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



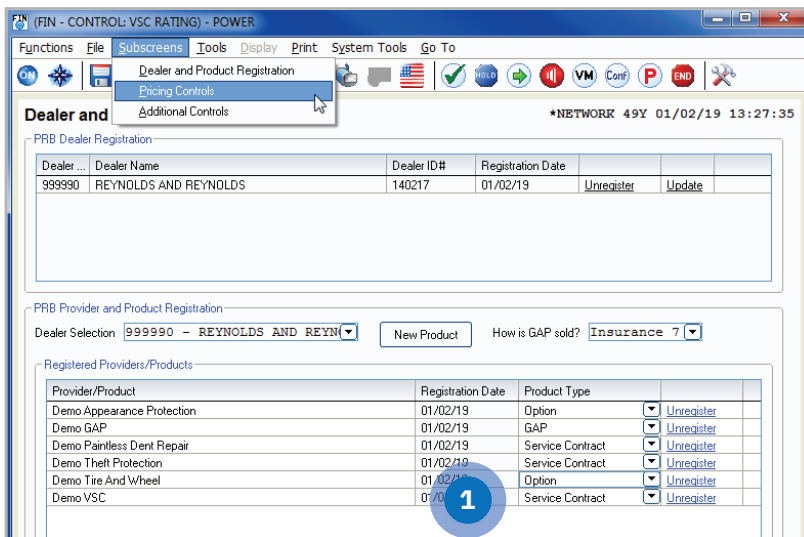
- 9 Select the Product Type by clicking on the drop down list next to each product that was registered. You can select GAP, Service Contract, or Option based on your process.

## 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 POWER Software Support at 888.999.6348 for specific details.

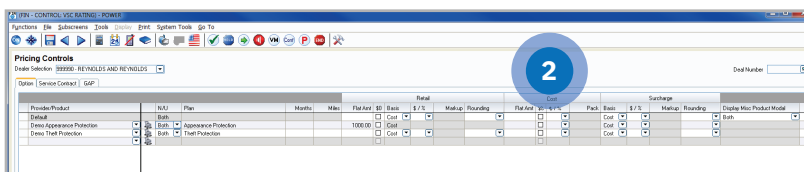
### Step 3: Set Product Integration Controls for pricing and profit information by product



1 From the FIN - CONTROL: VSC RATING window click Subscreens → Pricing Controls

or

Functions → VSC Rating and Products → Pricing Controls.



2 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
  - Flat Amt
  - Cost vs. List Basis
  - Markup based on % or \$
  - Rounding (ex. Next X.00 or Next X.99)
- Cost Pack
  - 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



Option	Preferred Product	Automatically Rate
Option 1	Demo Appearance Protection	<input checked="" type="checkbox"/>
Option 2		<input type="checkbox"/>
Option 3		<input type="checkbox"/>
Option 4	Demo Theft Protection	<input type="checkbox"/>
Option 5		<input type="checkbox"/>
Option 6		<input type="checkbox"/>
Option 7		<input type="checkbox"/>
Option 8		<input type="checkbox"/>
Option 9		<input type="checkbox"/>
SVC Contract 1		<input type="checkbox"/>
SVC Contract 2		<input type="checkbox"/>
SVC Contract 3		<input type="checkbox"/>
Insurance 7 - GAP		<input type="checkbox"/>

3 FIN - CONTROL: VSC RATING screen, click Subscreens → Additional Controls

or

select Functions → VSC Rating and Products → Additional Controls

### Preferred Product

- Select the default product you will see in the Product 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'.

### 4 F&I Menus

- 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).
- 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.

Contact POWER Support to define your Providers in the docuPAD System. 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 Finance and Insurance

The screenshot shows the 'Subscreens' menu in the POWER software. The 'Service Contracts' option is highlighted under the 'Trade-In 2 BPM' category. The menu also includes options like 'Buyer', 'Co-Buyer', 'Vehicle', 'Trade-Ins', 'Optional Sales', 'Down Payment', 'Rebates and Discounts', 'Tags', 'Official Fees', 'Insurances', 'Irregular Payments', 'Finance Information', 'Commissions', 'Deal Flow', 'Deal Comments', 'Email Addresses', and 'Deal Recap'.

**Step 1:** You can rate products from the **Options, Insurance, and Service Contracts** subscreens by clicking on the corresponding icons on the deal worksheet. You can also access the window(s) in the Subscreens menu that corresponds to the product.

**Note:** VIN and Mileage are required to rate products.

The screenshot shows the 'Service Contracts' subscreen in the POWER software. It displays three service contract entries (SVC CNTR 1, SVC CNTR 2, and SVC CNTR 3). Each entry has fields for Name, Sell, Cost, CAP/DOO, Residual, Rated Product, NAD#, Months/Miles, Engine Miles, Starts, Expires, Deduct, Type, Number, VAT Status, AFT, and ADA. The 'Get Pricing' button is highlighted for each entry.

**Step 2:** Click the **Get Pricing** button (on the Service Contract or Options window) or the **Shopping Cart** icon in the Get Pricing column to display the **Product and Rating Request** window, where product pricing can be retrieved..

The screenshot shows the 'Insurances' subscreen in the POWER software. It displays a table of insurance policies with columns for Name, Table, Rate, Term, Premium, Deduct, Cost, Policy#, and NAD#. The 'Get GAP Pricing' button is highlighted at the bottom of the screen.

The screenshot shows the 'Options' subscreen in the POWER software. It displays a table of options with columns for Sell, Cost, W/O, CAP/DOO, Resid, AFT, Rated, ADA, Months, Miles, and Deductible. The 'Get Pricing' button is highlighted for the 'EC DENT' option.

**Product and Rating Request**

Vehicle Information  
VIN: 1FADP3K2G5531780 Sold Date: 01/02/19 New/Used/Demo: New  
Vehicle Description: 2018 FORD FOCUS SE 5DR HBK  
Odometer: 3 Rating In-Service Date: 01/02/19  
Used Vehicles: ☐ Active Manufacturer Vehicle Warranty ☐ Original Owner

Product Information  
Product Type: Service Contract 1  
Provider/Product: Demco 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 for which to obtain pricing. 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.

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

**Miscellaneous Product Options**

Surcharges  
☐ Commercial Use  
☐ Snow Plow  
☐ Extended Powertrain

Miscellaneous  
Rate Book Code: \_\_\_\_\_  
Lender Code: \_\_\_\_\_  
Starting Mileage: \_\_\_\_\_  
Ending Mileage: \_\_\_\_\_

OK (F12) Cancel

**Rating Request**

Vehicle Information  
VIN: 1FADP3K2G5531780 Sold Date: 01/02/19 New/Used/Demo: New  
Vehicle Description: 2018 FORD FOCUS SE 5DR HBK  
Odometer: 3 Rating In-Service Date: 01/02/19  
Used Vehicles: ☐ Active Manufacturer Vehicle Warranty ☐ Original Owner

Product Information  
Product Type: Service Contract 1  
Provider/Product: Demco 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 4:** If there are any surcharges that may apply, the Miscellaneous Product Options window will display. Select as necessary and click **OK (F12)**.

**Product and Rating Request**

Vehicle Information  
VIN: 1FADP3K2G5531780 Sold Date: 01/02/19 New/Used/Demo: New  
Vehicle Description: 2018 FORD FOCUS SE 5DR HBK  
Odometer: 3 Rating In-Service Date: 01/02/19  
Used Vehicles: ☐ Active Manufacturer Vehicle Warranty ☐ Original Owner

Product Information  
Product Type: Service Contract 1  
Provider/Product: Demco VSC  
☒ Prompt Miscellaneous Product Option  
☐ Use Retail Price in Deal

Plan	Deductible	Product Price	Surcharges	Price
Service New & Used - D110-GOLD	<input type="checkbox"/> 100.00/0.00*	1253.00	<input checked="" type="checkbox"/> LTD Commercial OPT	300.00
Service New & Used - D110-PLATINUM	<input type="checkbox"/> 0.00	1394.00		
Service New & Used - D110-GOLD PLUS	<input type="checkbox"/> 250.00	889.00		
120/100000	<input checked="" type="checkbox"/> 100.00	1076.00		
96/120000				
96/100000				
96/80000				
94/120000				
94/100000				
94/70000				

Plan Name: Service New & Used - D110-GOLD PLUS Base Product Price: 1076.00  
Form Number: D1100115 Selected Surcharges: 300.00  
Limited Warranty: N/A Total Product Price: 1376.00

Provider Deductible Description: \$100  
\* = deductible is reduced to the listed price  
\*\* = deductible is reduced to zero

Get Pricing (F5) Save Product (F12) Cancel

**Step 5:** Select a product and plan by clicking the plus sign which displays available policies within that plan then choose a policy by placing a check in the appropriate box and 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 and the details of the product are recorded on the Service Contracts, Options, and Insurances screens as appropriate.

**Note: 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 rebook the product to reflect the changes.**

## Rating from F&I Menu Selling Presentations

## F&I Menu Designer – Setups

Go to **Finance and Insurance (Options)**  
→ **Functions** → **F&I Menu Designer**

Within a selected menu, double-click a product to open a 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 Editor is selected.”

## F&I Menu Presenter

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

**Note:** To select the Editor icon, the “Allow Runtime Editing” option must be checked in F&I Menu Designer > Package Item Properties.

**Extended Service Contract Editor**

Extended Service Contract

Type:  Months:

Name:  Miles:

Custom Tag1:  Deductible:

Custom Tag2:  Retail Price:

Discount:

Sell:

Cost:

☐ 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: 1FADP3K2G5531780 Sold Date: 01/02/19 New/Used/Demo: New

Vehicle Description: 2018 FORD FOCUS SE 5DR HBK

Odometer:  Rating In-Service Date: 01/02/19

Used Vehicles: ☐ Active Manufacturer Vehicle Warranty ☐ Original Owner

Product Information

Product Type: Service Contract 1

Provider/Product: JMS&A VSC

☒ Prompt Miscellaneous Product Option ☐ Use Retail Price in Deal

Plan	Deductible	Product Price	Surcharge	Price
Service New & Used - D110-GOLD	100.00/0.00*	1253.00		
Service New & Used - D110-PLATINUM	0.00	1394.00		
Service New & Used - D110-GOLD PLUS	250.00	889.00		
120/100000	100.00	1076.00		
96/120000				
96/100000				
96/80000				
94/120000				
84/100000				
84/70000				

Plan Name: Service New & Used - D110-GOLD PLUS

Form Number: D1100115

Limited Warranty: N/A

Base Product Price: 1076.00

Selected Surcharge: 300.00

Total Product Price: 1376.00

Provider Deductible Description: \$100

\* = 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 Menu Selling window, where the package item can be added to the deal as usual.

## Product Booking and Printing from Finance and Insurance

**Print Forms**

Form# 001 WILMINGTON RISC Printer X12

Form#	Name	Printed?	Type
001	WILMINGTON RISC		Impact
003	MD FMCC RIC V5		Impact
007	LAW 553 12/04		Impact
016	SALES INVOICE		Impact
017	BUYER'S ORDER		Impact
018	RECAP		Impact
019	BUYER'S GUIDE		Impact
025	VA 553 RIC 08		Impact
033	ODOMETER STMT		Impact
034	VERIF OF RESID		Impact
035	TEMP TRANSFER		Impact
036	MD-TEMP TAG		Impact
039	FORD ESP 02/07		Impact
040	FORD MED DUTY07		Impact
041	GAP ADDENDUM		Impact

☒ Display Auto-Print Forms  
☐ Display All Forms  
☐ Display docuPAD Forms

**Aftermarket Product Booking and Reprint**

Provider/Product	Plan/Product	Contract#	Status
<input type="checkbox"/> JMS& VSC	Service New & Used - D110...		
<input type="checkbox"/> Endurance VSC	Essential Care Level 3 3/3-6...		

**00367060 TESTING, TESTER** Deal Finance Status Open Deal# 00367060  
**2018 FORD FUSION** 3FA6P0H78J5578370 Stock# J5578370 240 Vehicle Finance

Book Contract (F3) Print Form (F10) Update (F12)

Once a product is added to a deal, you can book the contract from the F&I Forms window, accessed by selecting **Print → Forms**. On this window, simply select the product to book in the Product Booking and Reprint selection and **click Book Contract (F8)**.

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 forms will be printed and processed as usual.**

**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

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.

VSC Rating and Products Display

Provider/Product	Plan/Product	Rating Price	Rating Cost	Deal Price	Deal Cost	Contract#
Endurance GAP	150% FRANCHISE GAP	210.00	135.00	210.00	135.00	RYN00157771
JM&A VSC	Service New & Used - D1...	1615.00	1315.00	1615.00	1315.00	P00008149527
JM&A Etch	\$5,000 BENEFIT	349.00	114.00	349.00	114.00	P00008149528

Product Type **GAP**      Aftermarket Code

Original Rating Price (No Markup) **210.00**      Original Rating Cost (No Pack) **135.00**

Date Saved **01/03/19 10:24:09**      Date Booked **01/03/19 10:33:54**      Date Voided

You can also book contracts by selecting **Display > VSC Rating and Products Display**. 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 POWER FIN application.**



## Rating from docuPAD – Customize Deal Menu

Customize Deal Menu - 00367060 - TESTING, TESTER (Finance)

Finance Option 1 Term 60 Pmts/Yr 12 Rate 10.9100 Base Payment 1 Calculate  
 Finance Option 2 Term Pmts/Yr Rate Base Payment 2 N/A

AfterSales and Aftermarket Review

**Platinum**  
 CareGard Extended Coverage ...  
 Retail Price 1150.00  
 Months 60  
 Miles 100000  
 Deductible 0.00  
 Cost 750.00  
 Select Coverage

**Gold**  
 CareGard Extended Coverage ...  
 Retail Price 1150.00  
 Months 60  
 Miles 100000  
 Deductible 0.00  
 Cost 750.00  
 Select Coverage

**Silver**  
 CareGard Extended Coverage ...  
 Retail Price 1150.00  
 Months 60  
 Miles 100000  
 Deductible 0.00  
 Cost 750.00  
 Select Coverage

**Custom**  
 CareGard Extended Coverage ...  
 Retail Price 1150.00  
 Months 60  
 Miles 100000  
 Deductible 0.00  
 Cost 750.00  
 Select Coverage

**GAP - GAP**  
 Retail Price 900.00  
 Months 0  
 Miles 0  
 Deductible 0.00  
 Cost 400.00  
 Select Coverage

**CareGard MaintenanceCare**  
 Retail Price 750.00  
 Months 60  
 Miles 100000  
 Deductible 0.00  
 Cost 450.00  
 Select Coverage

**Theft Protection - Theft Prote...**  
 Retail Price 900.00  
 Months 0  
 Miles 0  
 Deductible 0.00  
 Cost 450.00  
 Select Coverage

**Tire & Wheel - Tire & Wheel**  
 Retail Price 650.00  
 Months 0  
 Miles 0  
 Deductible 0.00  
 Cost 300.00  
 Select Coverage

**CareGard KeyGard - 1 Year**  
 Retail Price 450.00  
 Months 0  
 Miles 0  
 Deductible 0.00  
 Cost 0.00  
 Select Coverage

Package Price 5,850.00 Term 60 Pmts/Yr 12 Rate 10.9100 Payment Calculate N/A

Package Price 4,800.00 Term 60 Pmts/Yr 12 Rate 10.9100 Payment Calculate N/A

Package Price 3,900.00 Term 60 Pmts/Yr 12 Rate 10.9100 Payment Calculate N/A

Package Price 3,450.00 Term 60 Pmts/Yr 12 Rate 10.9100 Payment Calculate N/A

**Step 1:** Go to Tools > Attach docuPAD Menu.

When the docuPAD Menu Select screen opens, choose a menu and select OK. Within the Customize Deal Menu screen, click on **Select Coverage** for the product you wish to rate.

GAP

Coverages

Available Coverages

Coverages GAP

Deductibles

Terms

Selected Coverage

Retail Price 900.00

Cost 400.00

Deductible

Months

Miles

AddOns

AddOns

Product Rating and Booking Selected Coverage

Plan Name

Terms

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 **POWER** software support.

Product and Rating Request

Vehicle Information

VIN 3FA6PH7B3578370 Deal Date 01/02/19 New/Used/Demo New

Vehicle Description 2018 FORD FUSION 4DR SDN

Odometer 5 Rating In-Service Date 01/02/2019

Used Vehicles: ☐ Active Manufacturer Vehicle Warranty ☐ Original Owner

Product Information

Product Type GAP

Provider/Product Endurance GAP

Prompt Miscellaneous Product Option ☒

Use Retail Price in Deal ☐

Product	Price	Deductible	Product Price	Surcharges	Price
150% BHPH GAP		0.00	155.00	COMMERCIAL	75.00
150% FRANCHISE GAP					
150% NON FRANCHISE GAP	155.00				

Plan Name 150% NON FRANCHISE GAP

Form Number GCMFV-150 rev 01-16

Base Product Price 155.00

Selected Surcharges 75.00

Total Product Price 230.00

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.

**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, XXX GAP must be shown in both places.

Customize Deal Menu - 00367060 - TESTING, TESTER (Finance)

Finance Option 1 Term: 60 Pmts/Yr: 12 Rate: 10.9100 Base Payment 1: Calculate  
 Finance Option 2 Term: Pmts/Yr: Rate: Base Payment 2: N/A

AfterSales and Aftermarket Review

Platinum	Gold	Silver	Custom
<b>CareGard Extended Coverage ...</b> Retail Price: 1150.00 Months: 60 Miles: 100000 Deductible: 0.00 Cost: 750.00 Select Coverage	<b>CareGard Extended Coverage ...</b> Retail Price: 1150.00 Months: 60 Miles: 100000 Deductible: 0.00 Cost: 750.00 Select Coverage	<b>CareGard Extended Coverage ...</b> Retail Price: 1150.00 Months: 60 Miles: 100000 Deductible: 0.00 Cost: 750.00 Select Coverage	<b>CareGard Extended Coverage ...</b> Retail Price: 1150.00 Months: 60 Miles: 100000 Deductible: 0.00 Cost: 750.00 Select Coverage
<b>GAP - GAP</b> Retail Price: 500.00 Months: 60 Miles: 0 Deductible: 0.00 Cost: 251.00 Select Coverage	<b>GAP - GAP</b> Retail Price: 500.00 Months: 60 Miles: 0 Deductible: 0.00 Cost: 251.00 Select Coverage	<b>GAP - GAP</b> Retail Price: 500.00 Months: 60 Miles: 0 Deductible: 0.00 Cost: 251.00 Select Coverage	<b>GAP - GAP</b> Retail Price: 500.00 Months: 60 Miles: 0 Deductible: 0.00 Cost: 251.00 Select Coverage
<b>CareGard MaintenanceCare - ...</b> Retail Price: 750.00 Months: 60 Miles: 100000 Deductible: 0.00 Cost: 450.00 Select Coverage	<b>CareGard MaintenanceCare - ...</b> Retail Price: 750.00 Months: 60 Miles: 100000 Deductible: 0.00 Cost: 450.00 Select Coverage	<b>CareGard MaintenanceCare - ...</b> Retail Price: 750.00 Months: 60 Miles: 100000 Deductible: 0.00 Cost: 450.00 Select Coverage	<b>CareGard MaintenanceCare - ...</b> Retail Price: 750.00 Months: 60 Miles: 100000 Deductible: 0.00 Cost: 450.00 Select Coverage
<b>Theft Protection - Theft Protection</b> Retail Price: 900.00 Months: 0 Miles: 0 Deductible: 0.00 Cost: 450.00 Select Coverage	<b>Theft Protection - Theft Protection</b> Retail Price: 900.00 Months: 0 Miles: 0 Deductible: 0.00 Cost: 450.00 Select Coverage	<b>Tire &amp; Wheel - Tire &amp; Wheel</b> Retail Price: 650.00 Months: 0 Miles: 0 Deductible: 0.00 Cost: 300.00 Select Coverage	<b>Tire &amp; Wheel - Tire &amp; Wheel</b> Retail Price: 650.00 Months: 0 Miles: 0 Deductible: 0.00 Cost: 300.00 Select Coverage
<b>Tire &amp; Wheel - Tire &amp; Wheel</b> Retail Price: 650.00 Months: 0 Miles: 0 Deductible: 0.00 Cost: 300.00 Select Coverage	<b>Tire &amp; Wheel - Tire &amp; Wheel</b> Retail Price: 650.00 Months: 0 Miles: 0 Deductible: 0.00 Cost: 300.00 Select Coverage	<b>CareGard KeyGard - 1 Year</b> Retail Price: 450.00 Months: 0 Miles: 0 Deductible: 0.00 Cost: 300.00 Select Coverage	
Package Price: 5,450.00 Term: 60 Pmts/Yr: 12 Rate: 10.9100 Payment: Calculate N/A	Package Price: 4,400.00 Term: 60 Pmts/Yr: 12 Rate: 10.9100 Payment: Calculate N/A	Package Price: 3,500.00 Term: 60 Pmts/Yr: 12 Rate: 10.9100 Payment: Calculate N/A	Package Price: 3,050.00 Term: 60 Pmts/Yr: 12 Rate: 10.9100 Payment: Calculate N/A

**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.

## Rating from docuPAD – Menu of Options

Menu of Options

Transaction Type: NEW CAR LOAN

Platinum	Gold	Silver	Custom
<b>CareGard Extended Coverage - Powertrain Protector</b> 60 months / 100000 miles / 0 deductible Complete coverage for your vehicle Except for a short list of excluded items, this plan covers all the parts in your vehicle \$24.95/mo	<b>CareGard Extended Coverage - Powertrain Protector</b> 60 months / 100000 miles / 0 deductible Complete coverage for your vehicle Except for a short list of excluded items, this plan covers all the parts in your vehicle \$24.95/mo	<b>CareGard Extended Coverage - Powertrain Protector</b> 60 months / 100000 miles / 0 deductible Complete coverage for your vehicle Except for a short list of excluded items, this plan covers all the parts in your vehicle \$24.95/mo	<b>CareGard Extended Coverage - Powertrain Protector</b> 60 months / 100000 miles / 0 deductible Complete coverage for your vehicle Except for a short list of excluded items, this plan covers all the parts in your vehicle \$24.95/mo
<b>GAP - GAP</b> 60 months / 0 deductible Covers the difference between your auto insurance company's valuation and the loan amount up to \$1000 \$10.85/mo	<b>GAP - GAP</b> 60 months / 0 deductible Covers the difference between your auto insurance company's valuation and the loan amount up to \$1000 \$10.85/mo	<b>GAP - GAP</b> 60 months / 0 deductible Covers the difference between your auto insurance company's valuation and the loan amount up to \$1000 \$10.85/mo	<b>GAP - GAP</b> 60 months / 0 deductible Covers the difference between your auto insurance company's valuation and the loan amount up to \$1000 \$10.85/mo
<b>CareGard MaintenanceCare - MaintenanceCare</b> 60 months / 100000 miles / 0 deductible Oil and Filter change, 19 Point Inspection, and Lubrication for Key Chassis Parts at every interval Full Tire Rotation every other interval \$16.27/mo	<b>CareGard MaintenanceCare - MaintenanceCare</b> 60 months / 100000 miles / 0 deductible Oil and Filter change, 19 Point Inspection, and Lubrication for Key Chassis Parts at every interval Full Tire Rotation every other interval \$16.27/mo	<b>CareGard MaintenanceCare - MaintenanceCare</b> 60 months / 100000 miles / 0 deductible Oil and Filter change, 19 Point Inspection, and Lubrication for Key Chassis Parts at every interval Full Tire Rotation every other interval \$16.27/mo	<b>CareGard MaintenanceCare - MaintenanceCare</b> 60 months / 100000 miles / 0 deductible Oil and Filter change, 19 Point Inspection, and Lubrication for Key Chassis Parts at every interval Full Tire Rotation every other interval \$16.27/mo
<b>Theft Protection - Theft Protection</b> 0 deductible With EtchGard, the vehicle glass is permanently marked with an ID that decreases the chance of theft and increases the chance of recovery if your vehicle is stolen \$19.53/mo	<b>Theft Protection - Theft Protection</b> 0 deductible With EtchGard, the vehicle glass is permanently marked with an ID that decreases the chance of theft and increases the chance of recovery if your vehicle is stolen \$19.53/mo	<b>Tire &amp; Wheel - Tire &amp; Wheel</b> 0 deductible Reimbursement for the expense of tire or wheel damage from road debris Replaces the tire if it is non-repairable \$14.10/mo	<b>Tire &amp; Wheel - Tire &amp; Wheel</b> 0 deductible Reimbursement for the expense of tire or wheel damage from road debris Replaces the tire if it is non-repairable \$14.10/mo
<b>CareGard KeyGard - 1 Year</b> 0 deductible Replaces covered key(s) when lost, stolen, or destroyed Up to \$349 per year Covers programming \$9.75/mo	<b>CareGard KeyGard - 1 Year</b> 0 deductible Replaces covered key(s) when lost, stolen, or destroyed Up to \$349 per year Covers programming \$9.75/mo	<b>CareGard KeyGard - 1 Year</b> 0 deductible Replaces covered key(s) when lost, stolen, or destroyed Up to \$349 per year Covers programming \$9.75/mo	
<b>Crystal Fusion Windshield Protection - Standard</b> \$9.75/mo			
Package Price: \$119.24/payment	Package Price: \$95.46/payment	Package Price: \$75.93/payment	Package Price: \$66.17/payment

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

**Product Editor**

GAP - [GAP] 500.00

FCI (00/00)

Coverage: GAP ☒ Rated

Term: Months 60 Miles 0

Deductible: 0.00

Product Rating Selected Coverage:  
Plan Name GAP PLUS PERSONAL USE 150%  
Terms 60/0

Keycode:

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

**Product Rating Request**

Odometer 5 Rating In-Service Date 01/02/19 ☒ 31 NEW 2018 FORD FUSION 4DR SDN VIN: 3FA6P0H78J5578370 Deal Date: 1/2/2019

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

GAP

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  
Selected Surcharge  
Total Product Price

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

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

**Product Editor**

**GAP - [GAP]** 210.00

FCI (00/00)

Coverage: GAP ☒ Rated

Term: Months 60 Miles 0

Deductible: Deductible 0.00

Product Rating Selected Coverage:

Plan Name	150% FRANCHISE GAP
Terms	60/0

Keycode:

Cancel Clear OK

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

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

**Step 5:** Use **Save to This Package** to save the product information and return to the Menu of Options screen, or select Reset to clear the rated product.

**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.

## Booking and Printing from docuPAD Deal Processes

The screenshot shows the 'F&I Forms' window with a list of products. The list includes columns for #, Dealer Description, Type, Status, Custom, and Category. The products are listed in a table with checkboxes for selection.

#	Dealer Description	Type	Status	Custom	Category
<input type="checkbox"/> 10	KNC LAW 553 CONT EPS14 (02/12)	docuPAD			RETAIL CONTRACT
<input type="checkbox"/> 27	KNC LAW 553 CONT EPS14(09/16)	docuPAD			RETAIL CONTRACT
<input type="checkbox"/> 28	KNC LAW 553 CONT EPS14(09/16)W	docuPAD			RETAIL CONTRACT
<input type="checkbox"/> 45	T-NPD RTL INSTALL CONT (09/17)	docuPAD			RETAIL CONTRACT
<input type="checkbox"/> 61	GWC LAW 553 ARB EPS14 (05/14)	docuPAD			RETAIL CONTRACT
<input type="checkbox"/> 72	GWLF LAW 553 ARB EPS14 (05/14)	docuPAD			RETAIL CONTRACT
<input type="checkbox"/> 39	T-NPD PAGES TO PRINT (09/17)	docuPAD			CREDIT INSURANCE
<input type="checkbox"/> 4	KNC GMPP WARRANTY REG (10/09)	docuPAD			ESC / WARRANTY
<input type="checkbox"/> 32	T-NPD LANDSCAPE (09/17)	docuPAD			ESC / WARRANTY
<input type="checkbox"/> 33	T-NPD AUTONUMBERING (09/17)	docuPAD			ESC / WARRANTY
<input type="checkbox"/> 50	GWC MOPAR VEH PROT APP (03/15)	docuPAD			ESC / WARRANTY
<input type="checkbox"/> 51	GWC AWS505 MECHANIC VSC(01/15)	docuPAD			ESC / WARRANTY
<input type="checkbox"/> 52	GWC AWS510 MECH PLAT+ (03/15)	docuPAD			ESC / WARRANTY
<input type="checkbox"/> 65	GWLF AWS505 MECHANIC VSC(01/15)	docuPAD			ESC / WARRANTY
<input type="checkbox"/> 66	GWLF AWS510 MECH PLAT+ (03/15)	docuPAD			ESC / WARRANTY
<input type="checkbox"/> 19	BARCODE SMALL GAP (05/10)	Impact/DP			GAP INSURANCE
<input type="checkbox"/> 20	BARCODE MEDIUM GAP (05/10)	Impact/DP			GAP INSURANCE
<input type="checkbox"/> 21	BARCODE LARGE GAP (05/10)	Impact/DP			GAP INSURANCE
<input type="checkbox"/> 22	BARCODE NOSIZE GAP (05/10)	Impact/DP			GAP INSURANCE
<input type="checkbox"/> 53	GWC DEBT GUARDIAN GAP (12/11)	docuPAD			GAP INSURANCE

Below the table, there are buttons for 'Refresh (F5)', 'Prepare docuPAD Forms (F8)', and 'Print (F10)'. There are also checkboxes for 'Skip Hidden Prompts' and 'Display docuPAD Forms Only'. A 'Print Queue' section includes checkboxes for 'Select All Forms', 'Print All Impact/DP Forms as docuPAD', and 'Print All Pages (docuPAD only)'. At the bottom, there is a 'Product Booking and Reprint' section with a table for 'Provider/Product', 'Plan/Product', 'Contract', 'Provider Status', and 'docuPAD'. The 'Sign on docuPAD' checkbox is checked, and the 'Book Contract (F9)' button is highlighted.

Once a product is added to a deal, you can book the contract from the F&I Forms window, accessed by selecting Print > Forms. In this window, select the product to book in the Aftermarket Product Booking and Reprint section and click **Book Contract (F9)**. Each contract must be booked individually.

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 and 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.

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

Contracts can also be booked by selecting Display > VSC Rating and Products. The VSC Rating and Products Display window displays a list of the rated products on the deal.

VSC Rating and Products Display

Provider/Product	Plan/Product	Rating Price	Rating Cost	Deal Price	Deal Cost	Contract#
Endurance GAP	150% FRANCHISE GAP	210.00	135.00	210.00	135.00	RYN00157771
JM&A VSC	Service New & Used - D1...	1615.00	1315.00	1615.00	1315.00	P00008149527
JM&A Etch	\$5,000 BENEFIT	349.00	114.00	349.00	114.00	P00008149528

Product Type **GAP**      Aftermarket Code

Original Rating Price (No Markup) **210.00**      Original Rating Cost (No Pack) **135.00**

Date Saved **01/03/19 10:24:09**      Date Booked **01/03/19 10:33:54**      Date Voided

[Reprint Contract](#) [Void Contract](#) [Close](#)

## Voiding a Contract and Reprinting Forms

If a buyer changes their mind about a product, the contract can be voided 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.**



For more information about how to rate and book your products in POWER,  
**select Go To > Online Documentation > Program News, and search  
'Product Rating and Booking'.**

For additional support questions, call **888.999.6348**.



Retail  
Management  
System

