# **F&I Product Rating and Booking**



# **User Guide**



Retail Management System



# **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<sup>®</sup> 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.

<sup>∩</sup> (SEC - PPD26)           − □ ×             Functions         Elle         Subscreens         Iools         Display         Reports         Print         System         Tools         Go         Tools         Subscreens         Tools         Display         Reports         Print         System         Tools         Go         Tools         Subscreens         Subscreens         Tools         Display         Reports         Print         System         Tools         Go         Tools         Subscreens         Subscreens         Tools         Subscreens         Subscreens	Finance and Insurance (Specs) → VSC Rating and Product – Screen Access
Security Access         Applications            • Finance and Insurance (Specs)             • Additional routines - screen Access             • Additional controls - Screen Access             • Check Specifications - Screen Access             • Insurance Date History - Screen Access             • Insurance Date History - Screen Access             • Insurance Maintenance Access             • Insurance Maintenance Access             • Insurance Maintenance Access             • Insurance Date History - Screen Access             • Insurance Date History - Screen Access             • Insurance Intervence Access             • Insurance Date History - Screen Access             • Insurance Intervence Access             • Insurance Intervence Access             • Pricing Controls	<ul> <li>☑ Dealer and Product Registration</li> <li>☑ Pricing Controls</li> <li>☑ Additional Controls</li> <li><b>To rate and book products you will need the following access:</b></li> <li>F&amp;I/Desking → Actions</li> <li>PRB: Book/Void Contracts</li> <li>PRB: Get Pricing</li> <li>F&amp;I/Desking → Screen Access</li> <li>☑ VSC Rating and Product Display</li> <li>F&amp;I/Desking → Aftersales – Fields</li> <li>☑ VSC Original Rating Cost (optional)</li> </ul>
User ID PPD26 Full Name Denny Hirt Store 27 / Branch 01	
F1         Help         F2         F3         F4         F5         F6           F7         F8         F9         F10         F11         F12         Update           > Esc=Return         PgUp/Dn=Next Screen         Ctrl=More	

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# Step 1: Register your dealership

ons <u>File Subscreens</u> <u>Tools</u> <u>Display</u> <u>Print</u> System Tools <u>Go</u> To

(FIN Specs) - Sales and F&I

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

ODS Utilities

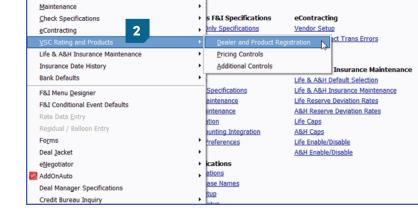
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# × 2 From the FIN Specs screen click

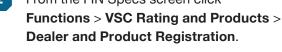
- (FIN Specs) Sales and F&I \_  $\times$ Functions File Subscreens Tools Display Print System Tools Go To ◎ ♦ 🔚 < ▷ | ≣ 😫 📕 🗢 🗅 | 🛲 🎛 🗗 🖻 🖬 🖌 | 🗸 👳 🕢 👀 Dealer and Product Registration Dealer Registration Dealer Name Dealer ID# Registration Date REYNOLDS MOTOR CO. Register Processing... FINCVS01 - 1009 × Registration was successful. Registration in progress... Please Wait... P ок Dealer Select • -Registered Providers/Products Provider/Product Registration Date Product Type
- 3 Click Register next to the Dealer Name. When the system is Anished processing, a success notiĀcation will pop up.

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



# 1

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



Provider ID

Processing...

Product request in progress.

Please Wait...

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ealer and Product Registration		PPD26	A62	03/05/18	09:58:33
Dealer Registration					
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ABC MOTORSPORTS	137076	11/09/16	<u>Unregister</u>	<u>Update</u>	
TEST - OPEN ROAD MOTORS 2	112078	09/09/13	Unregister	<u>Update</u>	
		1 Register New F	Product		
Provider and Product Registration — Dealer Select ABC MOTORSPORTS - Registered Providers/Products			_		

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

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

	Provider	Pr	ovider ID						
ÿ	CNA	4							
9	Continental Warranty	10	19						
9	Crystal Fusion	11	.8						
0	CSCI	52	2						
9	Dealer Admin Services	59	)						
0	Dealer Maintenance	72	2						
0	Dealers Choice	60	)						
9	Demo Provider 3	35	i						
	Product		Provider [	Dealer ID	Product Code	Prefix Override	Status	^	
	Demo GAP								
	Demo Paintless Dent Repai	r							
	Demo Theft Protection								
	Demo Tire And Wheel								
	Demo VSC							$\checkmark$	
1						Register (F12)	Cancel		
9	Dent Wizard	74	ł			-		_	
0	Dent Wizard MV	20	)						
9	Dent Zone	96	;						
3	DentPro	12	1						

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.

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Provider Selection

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Advantage Product Pipelin

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American Auto Guardian

American Guardian

Audi Financial Services

ASC Warranty

Assurance Plus

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Provider	Provider ID	
Accelerated Service Inter	78	
Advanced Protection Produ	89	
Advantage Product Pipelin	36	
3 AFAS	24	
Allstate	6	
Ally (APP)	65	
Ally (Vehicle One)	FINCVSX1 - 1003	×
Alpha Warranty Services		
American Auto Guardian	A Broduct Br	egistration is complete.
American Guardian		egistration is complete. IT: Please contact Demo Provider for
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ASC Warranty	Reynolds o	a Reynolds Support learn.
Assurance Plus		
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3 AUL		
Autoshield	79	
AutoXcel System	85	
3 Axiom	92	

You will receive a Registration Complete
pop up box; click <b>OK</b> . Then click <b>Close</b>
in the bottom right corner of the Provider
Selection screen.

4

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.

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TEST - OPEN ROAD MOTORS 2		112078	(	09/09/13		Unregis	ter	Upd	late		
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Dealer Select ABC MOTORSPORTS -Registered Providers/Products Provider/Product Demo Paintless Dent Repair Demo Theft Protection Demo Tire And Wheel Demo GAP			Registratio 03/05/18 03/05/18 03/05/18 03/05/18 03/05/18		Product Afterma Afterma ESC/Ma GAP Afterma	Type rket rket rket intenanco	(		nregis nregis nregis nregis	ter ter ter ter	
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#### **IMPORTANT**

It is imperative that you contact your provider(s) for important information regarding their speciĀc 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 speciĀc details.

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

1

🔳 (FIN Specs) - Sales and F&I									
Functions File Subscreens Tools	<u>D</u> isplay	<u>P</u> rint	S <u>y</u> ster	n Tools	<u>G</u> o To				
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Miscellaneous <u>F</u> &I Specifications			•				-		•••
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Check Specifications			•						
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VSC Rating and Products			Þ	<u>D</u> eal	ler and	Product	Registrati	on	ter
Life & A&H Insurance Maintenanc	e		×	<u>P</u> rici	ng Con	trols		N	ter
Insurance Date History			•	<u>A</u> ddi	itional (	Controls		13	ter
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F&I Menu <u>D</u> esigner									

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Demo Tire And Wheel		750.00	n i	art.							Cost -			▼ No
e El Litt					F4				9				FE	
No P2 Let P3					F10				11				FT2 Update	

From the FIN Specs screen click Functions > VSC Rating and Products > Pricing Controls.

2 DeĀne markup percentages or amounts by product type.

#### **Dealer Select Pricing Controls**

- Select the option of setting an overall default or itemizing per speciĀc 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 <u>File</u> Subs	screens <u>T</u> ools			
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Additional Cont	trols	F	PPD26	A62 01/3
Default Product			3	
Dealer Select AB	CMOTORSPORTS	<b>•</b>	3	
	Preferred Product		Aut	omatically Rate
Aftermarket	Demo Tire And Wheel		•	
ESC 1	Demo VSC		•	
ESC 2			•	
Maintenance 1			•	
Maintenance 2			•	
GAP	Demo GAP		•	
Override Aftern	narket Description with Provider Plan Descrip	otion		
- F&I Menus		ooked Aftermarket Pro	oducts	
Override Marku	p Rules Spo	ot Deliver Status War	ning messa	ae 💌
Save Product Price			r message	- <u></u>
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fte	rmark	et Product Maintenance													
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2	01	CAR CARE	senie rippedrunde i rotecuon	Ŧ	Yes	Ŧ		÷		÷.	0.00				
3	02	WEAR & TEAR		Ŧ	Yes	-	outer End	Ŧ		F	0.00				
4	04	TIRE AND WHEEL	Demo Tire And Wheel	Ŧ	Yes	Ŧ		-	No	눈	0.00				
5	12	ROAD HAZARD	bene ritering thee	Ŧ	Yes	Ŧ		H		늱	0.00				
6	AFT11	AFT 11		Ŧ	Yes	Ŧ		Ħ		F		Ē			
7	AFT12	TIRE & WHEEL		-	Yes	-		Ŧ		F	0.00				1
8	AFT13	WINDOW FTCH		Ŧ	Yes	-		Ŧ		F		ī			
9	AFT14	ADD-ON AUTO ACCESSORIES		Ŧ	Yes	-		•	Yes	F	0.00				
10	AFT15	AETMKT 15		Ŧ	No	Ŧ		٦	No	নি	0.00				
11	AFT16	THEFT PROTECTION	Demo Theft Protection	-	No	-		•	No	ন	0.00				
12	AFT17	AFTMKT 17		Ŧ	No	Ŧ	Front-End	•	No	ন					
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	নি	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	AFT3	AFT 3			No		Back-End	F	No	নি	895.00		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**

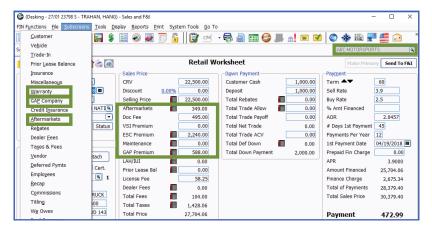
- You can set what messages (if any) pop up when delivering or closing a deal
  - No message Deal will Deliver or Close without message.
  - Warning message Deal will inform associate they have unbooked products, but will allow them to Anish the deal.
  - Error message Deal will inform the associate they have unbooked products, and will not allow them to Ānish 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.

4

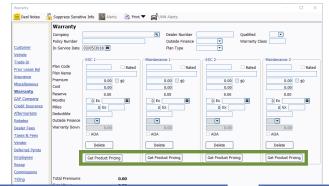
## **Product Rating**

#### Rating from a deal record in ERA-IGNITE or Desking

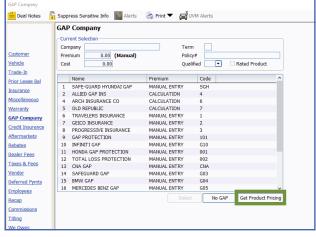


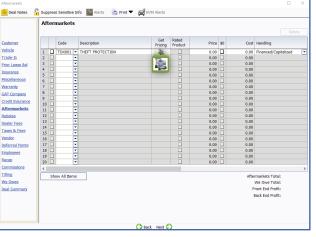
Step 1: You can rate products from the Aftermarket, Warranty, and GAP subscreens or by clicking on the corresponding icons in the deal worksheet, or access the window(s) in the Subscreens menu that corresponds to the product.

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 1FTEX1CB3JFB13119 Deal Date 03/05/18 New/Use	d/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 Orig	ginal Owner					
Product Information						
Product Type ESC1		Prompt Miscella	neous	Product Option		
Provider/Product Demo VSC		Use Retail Price				
Plan	Deductible	Product Price		Surcharges	Prio	e
Plan Name				Base Product Price	c	0.00
Form Number				Selected Surcharges	C	0.00
Limited Warranty				Total Product Price	C	0.00
Provider Deductible Description						
* = deductible is reduced to the listed price						
** = deductible is reduced to zero						
			Ge	t Pricing (F5) Save Product (F12)	Can	cel

iscellaneous Product Options

Surcharges

Miscellaneous Rate Book Code

Lender Code

OK (F12)

Surcharges

- Step 3: In the Provider/Product Āeld, select the provider and product to obtain pricing for. Use the dropdown arrow in this Āeld 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 proĀt 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).

Product and Rating Request				
Vehicle Information				
	w/Used/Demo New			
Vehicle Description 2018 FORD TRUCK F-150 2WD SUPERCA				
Odometer 12 Rating In-Service Date 03/05/2018				
Used Vehicles: Active Manufacturer Vehicle Warranty	Original Owner			
Product Information				
Product Type ESC1		Prompt Mi	scellaneous Product Opt	ion
Provider/Product Demo VSC		· · ·		
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				

Step 5: You can turn the prompts on or off or 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 reĀect 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.

•

•

Cancel

Product and Rating Request				
Vehicle Information				
VIN 1FTEX1CB3JFB13119 Deal Date 03/05/18 New/Used	d/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 Orig	ginal Owner			
Product Information				
Product Type ESC1		Prompt Miscellane	ous Product Ontion	
Provider/Product Demo VSC		Use Retail Price in		
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 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	Protection Package Item Settings Vehicle Appearance Protection AfterMarketItem  AFT13 - WINDOW ETCH	Allow Runtime Editing Allow Price Allow Discount Allow Cost	Allow Zero Price	
LAH Type Plan Name		Allow Warranty Data	Allow Zero Months Allow Custom Tag1	
Months Miles	0	Presentation File	Allow Custom Tag2	9
Deductible Retail Price Discount Sale Price Cost - Premium Markup - Minimum Markup	0.00 250.00 0.00 250.00 80.00 		em Description Maintain shownoom condition. Protects paint from bugs, tree sag, bird droppings and other pollutants. Protects interior fabric and leather from fading and stains ecliner Statement	
Maximum Markup - Maximum Discount Maximum Discount	0 01	D	isability Disclaimer	
	emo Appearance Protection Automatically Rate when Editor is selecte			

#### 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.

HAN NG PLACE Deal Number 23798 ERCAB FX1CB3JFB13119 F&I Manager Base Payment \$415.25 Rate Base Payment \$357.84/72mo/4.4% 22500.00 Term 60 Net Trade ~ ervice Co ntract 📓 Vehicle Service Contract Vehicle Service C ntract Vehicle S sts of parts and labor on cov r 36 months or 36,000 mile s costs of parts and labor on co rs for 36 months or 36,000 mile Pays costs of parts and labor on c repairs for 36 months or 36,000 mi \$0.00 deductible. Pays costs of parts and labor on covered repairs for 36 months or 36,000 miles, with \$0.00 deductible. \$1262.00(@\$23.22/mth GAP Protection **GAP** Protection GAP Protection <u>/</u> <u>/</u> ys difference between actual cash value J loan balance if your vehicle is declared land loan balance if your vehicle is declared and loan balance if your vehicle is declared land loan balance if your vehicle is declared at loss due to thet or collision @\$13.522mmth @\$13.522mmth Vehicle Appearance Pr... Vehicle Appearance Pr... from bugs, tree sap, bird droppings and ot pollutants. Protects interior fabric and leat m bugs, tree sap, bird droppings and other Ilutants. Protects interior fabric and leather and stains \$400.00(@\$7.36/mth) \$400.00(@\$7.36/mth) Window Etch 1 \$1262.0 Package Total Pric Package Discount \$2397.00 Package Total Pric \$1997.00 Package Total Pric \$0.00 Package Discount \$0.0 0 72

Custom Tag 1

Custom Tag 2

Get Pricing (F5)

ОК

Vehicle Appearance Protection Editor

Vehicle Appearance Protection

Aftermarket Code AFT13

Apply to All Package Items

AFTMKT 13

250.00

250.00

80.00

Aftermarket

Retail Price

Discount

Sale Price

Cost

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.

- Deal Date 03/05/18 New/Used/Demo New VIN 1FTEX1CB3JFB13119 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 Owne Product Information Product Type Aftermarket Aftermarket Code AFT13 Prompt Miscellaneous Product Option

   Use Retail Price in Deal
   rovider/Product Demo Appearance Protection 🖸 🖪 Product Price Product Deductible Price Price Surcharge Appearance Protection 12/12000 24/24000 36/36000 50.00 325.00 425.00 525.00 Appearance Protection Base Product Price 525.00 Plan Name Form Number DAP DemoForm\_APPEARANCE Selected Surcharges 0.00 Total Product Price 525.00 vider 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.

 $\times$ 

Cancel

Electronic High Tech

Seals & Gaskets (0-100,0.
 Seals & Gaskets (100,00..
 Technology Package
 Turbocharger

Seals & Gaskets (0-100.0

Base Product Price

Selected Surcharges

Total Product Price

75.00 100.00

50.0

75.00 100.00 150.00

1262.00

1262.00

0.00

### 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 nny 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 Miles Cost 0.00 0.00 /iles Repla ect Coverage Cost 50.00 Deductible 0.00 Deductible 0.00 Allied GAP - GAP ct Coverage Cost Cost Retail Price 🍰 🗯 0.00 Key Replacement - Standard eplace erage Months ABSOLUTE Tire & Rim Protecti. Ford Protection Plan - Basic G... Retail Price 🏼 🗯 399.00 Miles Months 36 Retail Price 🙎 🛗 199.00 Retail Price 🙎 📷 0.00 Deductible 0.00 Miles Cost Months 36 465.00 79.00 Deductible 0.00 Cost Miles Replace Cost 199.0 Deductible 50.00 t Coverage AFTERMARKET 1 - AFT1 Cost 0.00 Replao Select Coverage Tire & Wheel Protection - Pro... Replace ct Coverage Retail Price 🛸 🗯 200.00 Car Care Upgrade - Elite1 No Retail Price 🏼 🗯 0.00 Months Miles Months 36 1100 Retail Price 🏼 🗯 349.00 Cost 0.00 Deductibl 111.00 Months Cost Miles Replao 20.00 ad Hazar 0.00 Coverage Deductible Cost Service Maintenance Agreem... 0.00 0.00 Retail Price 🔮 🗯 Select Coverage Replace Retail Price 🍰 👼 Months 0.00 Miles Deductib Miles Cost 0.00 0.00 Cost 0.00 Replace ect Coverage Replao ct Coverage

Deal Date 03/05/18 New/Lised/Demo New

Original Owner

VIN 1FTEX1CB3JFB13119

Odometer

Plan

Product Informatio

Product Type ESC1 Provider/Product Demo VSC

Gold Vrap 12/12000 24/24000 36/36000 48/48000

60/65000 Plan Name

Limited Warranty N/A

Provider Deductible Description

Gold Wrap

DAP De

n\_WARRANTY

\$0

Vehicle Description 2018 FORD TRUCK F-150 2WD SUPERCAE

Used Vehicles: Active Manufacturer Vehicle Warranty

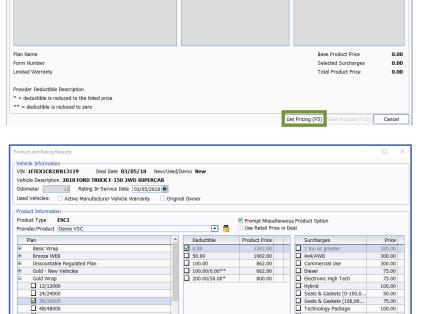
12 Rating In-Service Date 03/05/2018

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.



🗔 🗗

Deductible

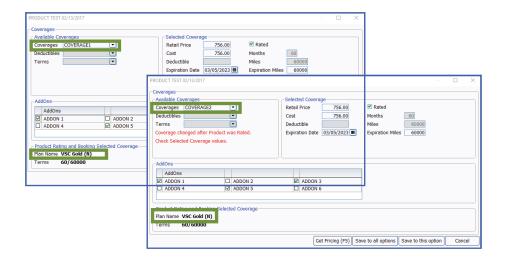
Prompt Miscellaneous Product Option
Use Retail Price in Deal

Surcharges

Price

Product Price

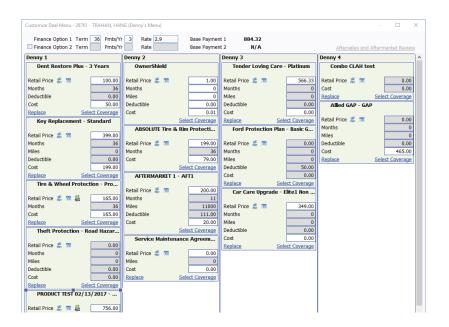
800.00



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.

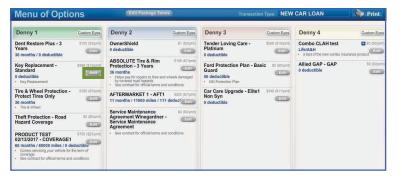
Step 4: Select Save to all options or Save to this option.

PRODUCT TEST 02/13/2017						$\times$
Coverages Available Coverages Coverages Deductibles Terms V	Selected Cox Retail Price Cost Deductible Expiration D	756.00 756.00	<ul> <li>✓ Rated</li> <li>Months</li> <li>Miles</li> <li>Expiration Mile</li> </ul>	60 60000 s 60000		
AddOns						5
AddOns						
ADDON 1 ADDON 2	ADD(	ON 3				
ADDON 4 ADDON 5	ADD(	DN 6				
Product Rating and Booking Selected Coverage Plan Name VSC Gold (III) Terms 60/60000						
		Get Pricing (F5)	Save to all options	Save to this option	Can	cel



Step 5: Once all applicable products have been rated, select Ready for docuPAD (F8).

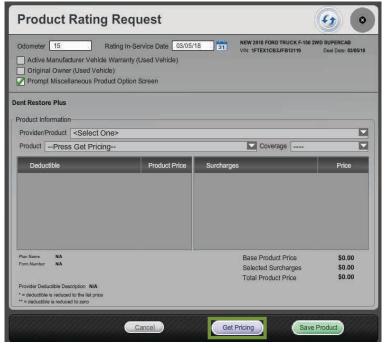
> Note: The **E** icon will serve as an indicator that the pricing was obtained through Product Rating and Booking.



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.

Original Owner (Used Vehicle) Prompt Miscellaneous Product Option nt Restore Plus	Screen		
oduct Information			
Provider/Product <select one=""></select>			
Product Press Get Pricing		Coverage	
Deductible	Product Price	Surcharges	Price
tan Name NA om Number NA		Base Product Price Selected Surcharges Total Product Price	\$0.00 \$0.00 \$0.00
rovider Deductible Description N/A = deductible is reduced to the list price			
* = deductible is reduced to zero			
* = deductible is reduced to zero	Cancel	Get Pricing Save	Product
* = deductible is reduced to zero	Cancel	Get Pricing Save	Product
** = deductible is reduced to zero	Cancel	Get Pricing Save	
** = deductible is reduced to zero: Product Editor Dent Restore Plus - [3 Years] RA23PL1173NA (10/06) Coverage: 3 Years		Get Pricing Save	
** = deductible is reduced to zero.       Product Editor       Dent Restore Plus - [3 Years]       RA23PL1173NA (10/06)       Coverage:	165.00		
	165.00		

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.

Package Packages

## **Product Booking and Printing**

Deale	r Description 🔘 Standard Description							
#	Dealer Description	Туре	Status	Custom	Category	Preview	Void	Misc. dP
65	WELLS FARGO CONT-OH (03/02)	Impact			NONE			
243	WE OWE FORM (NO REV)	Impact			MISCELLANEOUS			
3	WE OWE (11/95)	Laser			MISCELLANEOUS			
349	WE OWE (03/13)	docuPAD			MISCELLANEOUS	Preview		First Form
72	VA TITLE APP (12/05)	Laser			STATE FORMS/TITLE APP.			
4	VA REGISTRATION APP (07/05)	Laser			STATE FORMS/TITLE APP.			
102	VA BUYERS ORDER-M (NO REV)	Laser			MISCELLANEOUS			
101	VA BUYERS ORDER-A (01/02)	Laser			MISCELLANEOUS			
57	US BANK CONTRACT-OH (01/02)	Impact			RETAIL CONTRACT			
15	US BANK ATPI	Impact			AGREEMENT TO PROVIDE			
258	UNITED CAR CARE VIPCA-WA (07/05	) Impact			ESC/WARRANTY			
201	TX TT/PMT VERIFICATION (08/05)	Impact			STATE FORMS/TITLE APP.			
200	TX TT/PMT VERIFICATION (01/05)	Impact			STATE FORMS/TITLE APP.			
199	TX TT/PMT VERIF (10/00)	Impact			STATE FORMS/TITLE APP.			
206	TX TRADE3 POA-PDF (11/09) DP	docuPAD			STATE FORMS/TITLE APP.	. Preview		
205	TX TRADE2 POA-PDF (11/09) DP	docuPAD			STATE FORMS/TITLE APP.	Preview		
204	TX TRADE1 POA-PDF (11/09) DP	docuPAD			STATE FORMS/TITLE APP.	. Preview		
141	TX TITLE ISSUE CNTY-PDF(02/11)	Impact			STATE FORMS/TITLE APP.			
140	TX TITLE APP-PDF (05/12)	Impact			STATE FORMS/TITLE APP.			
202	TX TITLE APP-PDF (04/11)	Impact			STATE FORMS/TITLE APP.			
203	TX SOLD POA-PDF (11/09) DP	docuPAD			STATE FORMS/TITLE APP.	Preview		
Skip H rint Q	iidden Prompts 🛛 Display docuPAD Jeue	Forms Only	, 		Refresh (F5) Prepa	re docuPAD	Forms (F	8) Print (F1
	ct All Forms Print All Impact/DP F		uPAD  Print	t All Pages (docuP	AD only)	Print d	P Copies	Print Queu
- Contract	BOOKING AND REDITION ROMEONE ECON	uncer office						
Pn	ovider/Product Plan/Product	Co	ntract Prov	vider Status doo	uPAD	Cine		
	mo Appearance Appearance Protec	tion					on docuP/ t Unbook	

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 speciĀed by the provider, so forms will be Āled 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.

400.00 required 55.00 862.00	55.00	400.00 55.00 862.00		RYN00015818 RYN00015817
· · ·				RYN00015817
862.00	862.00	862.00	962.00	
			002.00	
ket Code				
ket Code iginal Rating Cost (No Pack)	)	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	0.60.00		
			802.00	862.00	862.00	
Product Type <b>Aftermarket</b> Driginal Rating Price (No Markup)	Aftermarket Code AF 400.00 Original Rating (	F12	602.00	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 speciĀc 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.

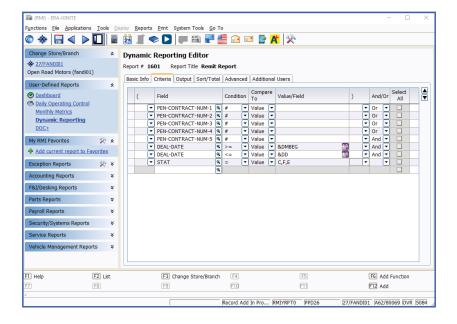
Step 1: Open the Retail Management Intelligence Application found under My Applications on the ERA-IGNITE homepage by simply clicking the time icon found on your toolbar.

🔛 (RMI) - ERA-IGNITE	- 🗆 🗙
Functions Fie Applications Tools	)isplay <u>R</u> eports <u>P</u> rint System Tools <u>G</u> o To
	CCH+A 💦 🔽 📰 📰 🚰 💼 🖙 🕼 🧏 🔆
Search/Change Dynamic Report	CIT+5
Delete Dynamic Report	amic Reporting
Undo All Changes	rtsi Completed Reports Scheduled Reports
Browse Forward	Ctrl+F la
Browse Backward	Ctrl+B PPD26 Owned By Report #
Undo Current Field	Ctrl+Z Run Since
Schedule Dynamic Report	🖲 Run Area 🔍 Store 🔍 Branch 🔍
Monthly Metrics Dynamic Reporting DOC+	Search (F5) More Select (F12) Clear
My RMI Favorites	Report #         Title         Owner         Data Set         Last Run         Last I           No records were found that match the search criteria         No records were found that were found
F&I Audit Report F&I Annagement Report Finance Reserve Analysis Report Heat Sheet Report Inventory Analysis Report Quick Vehicle Advance Report Sales DOC 1: DAC'S DOC	< ,
Sales DOC 1: DAC S DOC Sales DOC 4: SALES DOC 4	
F1 Help F2	F3 Change Store/Branch F4 F5 Search F6
<b>1 Help</b> F2 7 F8	F3         Change Store/Branch         F4         F5         Search         FE           F9         Add New         F1         F1         F12         Select

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.

(RMI) - ERA-IGNITE	<u>Tools</u> Dis	olay <u>R</u> eports <u>P</u> rint S <u>v</u> stem T									
1		🛃 🔳 🗢 🗋 🖛 🗄	B	2 🖆 🖻 🖬 🦎							
Change Store/Branch	*	Dynamic Reporting Ec	litor	r							
27/FANDI01 Open Road Motors (fandi01	)	<u> </u>		mit Report							
User-Defined Reports	*	Basic Info Criteria Output	Sort,	Total Advanced Additional Users							
Dashboard					Outpu	it Group				•	1
Daily Operating Control		Field		Column Title	Width	Format		L/R	MV C	option ^	
Monthly Metrics		DEAL-NO	8	DEAL-NO	7				-		0
Dynamic Reporting		DEAL-DATE	9	DEAL DATE	10	MM/DD/YY	9	R	-		
DOC+		B-NAME		BUYER NAME	60				-		
		STK-NO	9	STOCK #	8			L	-		
My RMI Favorites	* *	ID-NO	9	VIN	19			L	-		
Add current report to Fa	avorites	PEN-CONTRACT-NUM-1	9	CONTRACT 1	17			L	-		
		ORIG-RATE-COST-1	94	ORIG RATE COST 1	9	\$#,###.##	F 🖪	R	-		
Exception Reports	🔆 🛠	PEN-CONTRACT-NUM-2	8	CONTRACT 2	17			L	-		
Accounting Reports	¥	ORIG-RATE-COST-2	9	ORIG RATE COST 2	9	\$#,###.##	F 🔍	R (	<b>-</b>		
		PEN-CONTRACT-NUM-3		CONTRACT 3	17				-		
F&I/Desking Reports	¥	ORIG-RATE-COST-3	- 9	ORIG RATE COST 3	9	\$#,###.##	: 🖻	( R (	-		
Parts Reports	×	PEN-CONTRACT-NUM-4	9		17				-		
		ORIG-RATE-COST-4	9		9	\$#,###.##	ŧ 🖪		-		
Payroll Reports	¥	PEN-CONTRACT-NUM-5	<u> </u>	CONTRACT 5	17			- (	-		1
Security/Systems Reports	*	ORIG-RATE-COST-5	٩	ORIG RATE COST 5	9	\$#,###.##	F (%)	R (	-	~	L
		<								>	
Service Reports	¥	Print Options									
Vehicle Management Repo	rts ¥	Header Line									
		Footer Line									
1 Help	F2 Lookup	F3 Change St	ore/D	ranch F4	[F5]		-	(FC)	Add Fun	ction	
			ore/B							cuuit	
7	F8	F9		F10	F11			F12	Add		
				Record Add In Pro RMIYRPTO	PPD26					INS S	

🛍 (RMI) - ERA-IGNITE			- 🗆 X
Functions <u>File</u> Applications	<u>T</u> ools <u>D</u> is		
③ 🚸 🔚 < 🕨		🕺 🎩 🗢 🖸 📖 📰 📲 🚝 🕢 💷 📴 🔆	
Change Store/Branch	*	Dynamic Reporting Editor	
27/FANDI01 Open Road Motors (fandi01)		Report # 1601 Report Title Remit Report	
User-Defined Reports	*	Basic Info Criteria Output Sort/Total Advanced Additional Users	
<ul> <li>Dashboard</li> <li>Daily Operating Control Monthly Metrics</li> <li>Dynamic Reporting DOC+</li> </ul>		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	
My RMI Favorites Add current report to Favorite	_	Sort/Group By Sort By Field DEAL-DATE Sort By Ascending	
Exception Reports Accounting Reports	≫ × ×		
F&J/Desking Reports	×		
Parts Reports	¥		
Payroll Reports	¥	Totals/Averages Options For Number format fields, display:	
Security/Systems Reports	×	Group Averages Group Totals	
Service Reports	×	Report Averages Report Totals	
Vehicle Management Repor	ts ¥	Group Options     Show all detail     Show summary view	
1 Help	F2]	F3 Change Store/Branch F4 F5	F6 Add Function
7 (	FB	F3 F1 F1	F12 Add
		Record Add In Pro RMIYRPT0 PPD26	27/FANDI01 A62/80069 INS 5084

**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).

# 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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