

F&I Product Rating and Booking

ERA[®]



User Guide



Retail
Management
System

 Reynolds
& Reynolds[®]

Setup and Registration

Setup and Registration	1
Step 1: Register your dealership	2
Step 2: Register providers and products	3–4
Step 3: Set Product Integration Controls for pricing and profit information by product	5–6

Rating and Booking

Product Rating	7
Rating from a deal record in ERA-IGNITE or Desking	7–9
Rating from F&I Menus Presentation	9
F&I Menu Designer - Setups	9
Rating from docuPAD – Customize Deal Menu	11
Rating from docuPAD – Menu of Options	13
Product Booking and Printing	15
Voiding a Contract and Reprinting Forms	16
Build a Remittance Report	17



Setup and Registration

ERA®

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

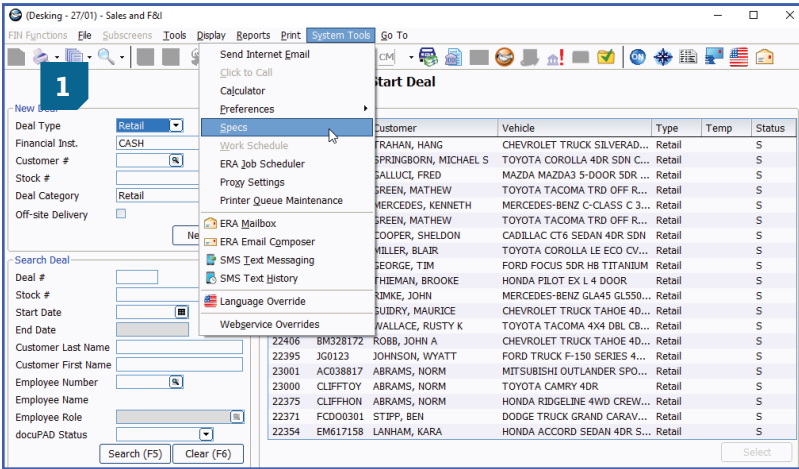
- VSC Rating and Product Display

F&I/Desking → Aftersales – Fields

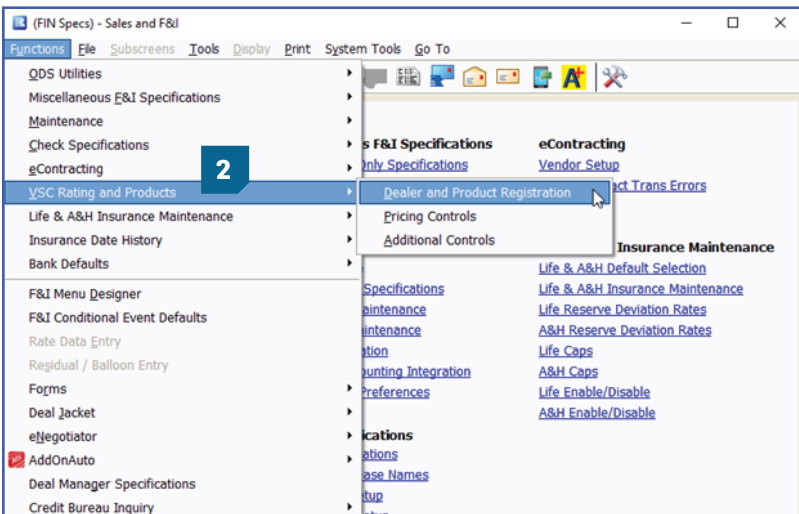
- VSC Original Rating Cost (optional)



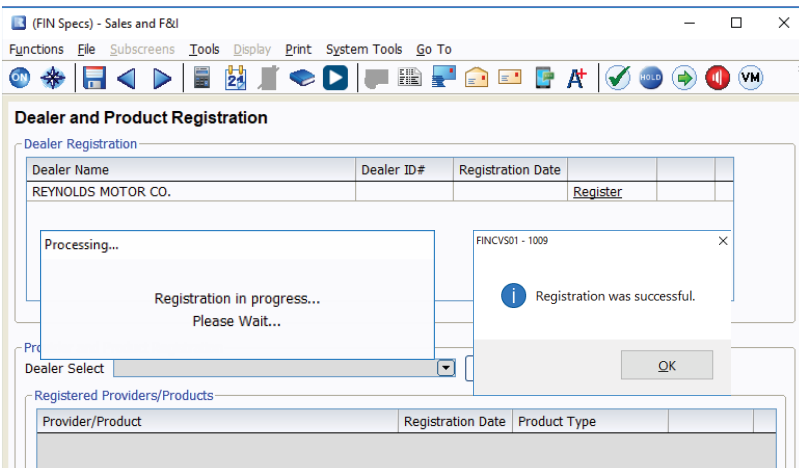
Step 1: Register your dealership



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



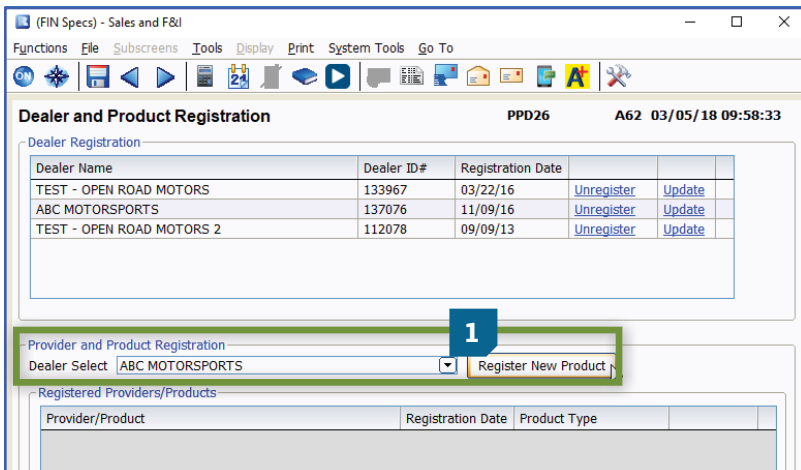
2 From the FIN Specs screen click **Functions > VSC Rating and Products > Dealer and Product Registration**.



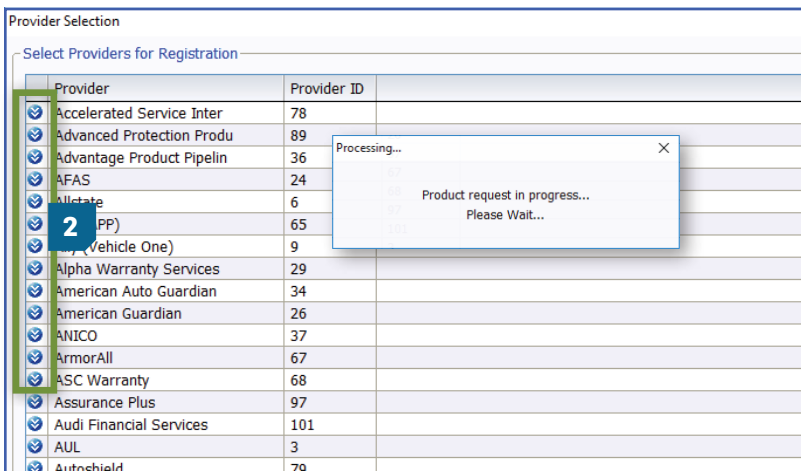
3 Click **Register** next to the Dealer Name. When the system is finished processing, a success notification will pop up.

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

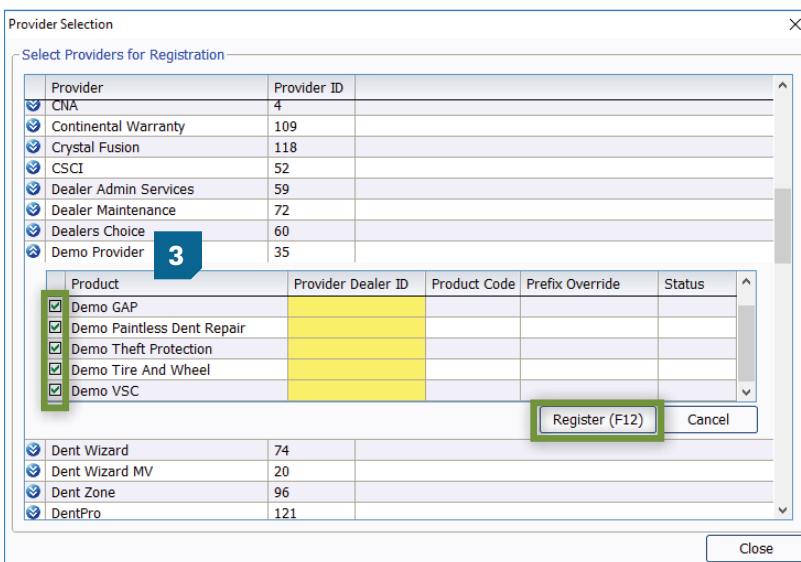
Step 2: Register providers and products



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

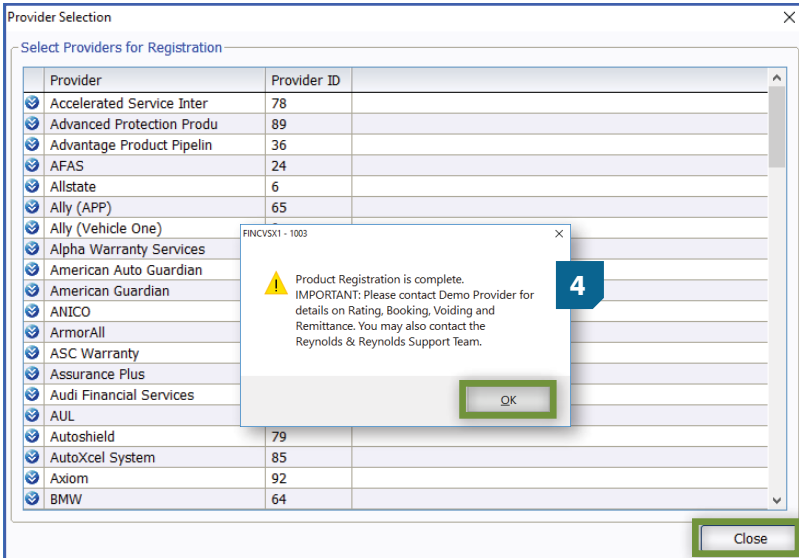


- 2 Click the double arrow on the left to choose products to register from providers with which your dealership has an existing relationship.

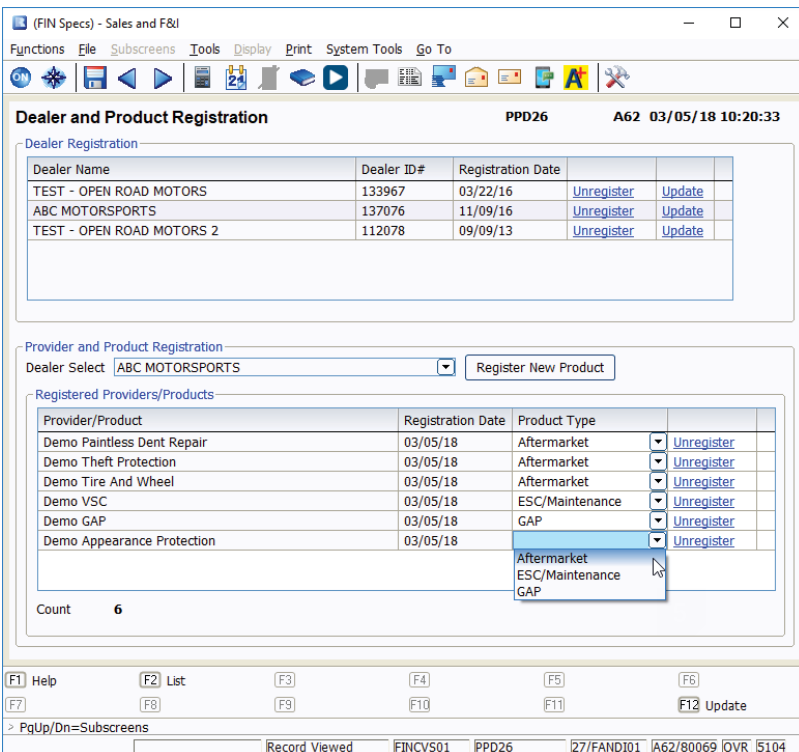


- 3 The products available for the provider will then display. Enter the Provider ID given to you by the provider next to the products you wish to register. Uncheck the boxes next to the products you do not want to register. Next, click Register (F12).

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.



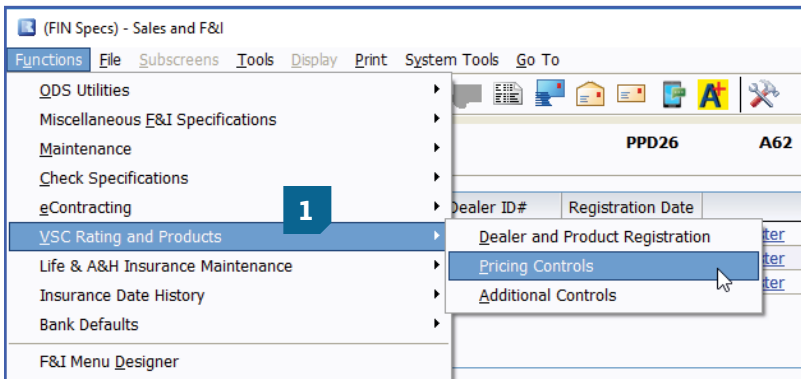
5 Select the Product Type by clicking on the drop down list next to each product that was registered. You can select Aftermarket, ESC/Maintenance, or GAP based on your processes.

IMPORTANT

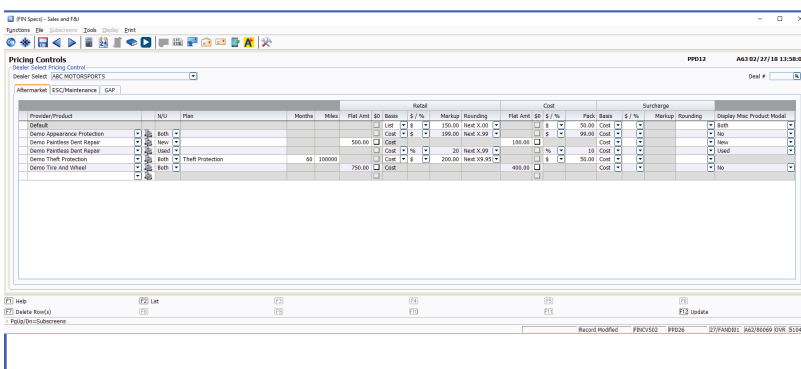
It is imperative that you contact your provider(s) for important information regarding their speciĀc rating, booking, voiding, and remittance processes after you have successfully completed the registration process. Some providers require additional steps to be taken in order to properly rate, book, 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 From the FIN Specs screen click **Functions > VSC Rating and Products > Pricing Controls**.

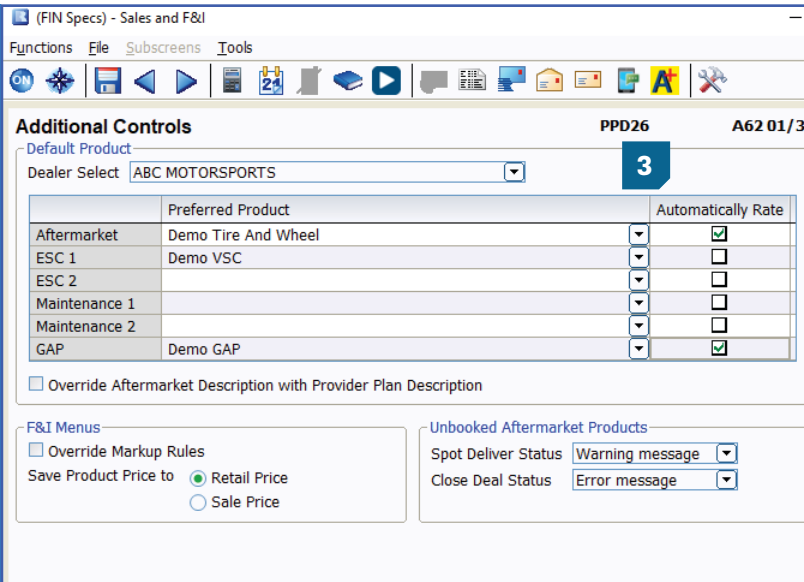


- 2 Define markup percentages or amounts by product type.

Dealer Select Pricing Controls

- Select the option of setting an overall default or itemizing per speciAc 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.



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.

Code	Description	VSC Rating Provider	Tax	Profit	We Owe	Price \$0	Cost	Commis
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	AFT3 AFT 3		No	Back-End	No	895.00		25.00

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.

Rating and Booking

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 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 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 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 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 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
<input checked="" type="checkbox"/> Basic Wrap	0.00	1262.00	<input type="checkbox"/> 1 ton or greater	320.00
<input type="checkbox"/> Bronze WEB	50.00	1062.00	<input type="checkbox"/> 4w/AWD	300.00
<input type="checkbox"/> Discountable Regulated Plan	100.00	862.00	<input type="checkbox"/> Commercial Use	300.00
<input type="checkbox"/> Gold - New Vehicles	100.00/0.00**	662.00	<input type="checkbox"/> Diesel	75.00
<input type="checkbox"/> Gold Wrap	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 **50**
 * = 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, 1300 IRVING PLACE, SAINT CHARLES MO 63301

Vehicle: 2018 FORD TRUCK F-150 2WD SUPER CAB, VIN: 1FTEX1C83JFB13119, Miles: 12

Date: 03/05/2018 1:22 PM

Deal Number: 23798

F&I Manager: []

Base Payment: \$415.25

Base Price: \$357.84/72mo/4.4%

Amount Financed: 22566.29, Down Payment: 2000.00, Rate: 3.9, Total Rebate: []

Sale Price: 22500.00, Term: 60, Net Trade: []

Package	Price	Discount	Package Price
Vehicle Service Contract	\$1262.00	\$0.00	\$1262.00
GAP Protection	\$413.52	\$0.00	\$413.52
Vehicle Appearance Protection	\$400.00	\$0.00	\$400.00
Window Etch	\$299.00	\$0.00	\$299.00

Package Total Price: \$1662.00, Package Discount: \$0.00, Package Price: \$1662.00

Terms: 60, Rate: 3.9

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: []

Aftermarket Code: AFT13, Custom Tag 2: []

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 1FTEX1C83JFB13119, Deal Date 03/05/18, New/Used/Demo New

Vehicle Description: 2018 FORD TRUCK F-150 2WD SUPER CAB

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, 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"/> 36/36000	525.00				

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 - 23761 - TRAHAN, HIANG (Denny's Menu)

Finance Option 1 Term Pmts/Yr Rate 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 <input type="text" value="100.00"/> Months <input type="text" value="36"/> Deductible <input type="text" value="0.00"/> Cost <input type="text" value="50.00"/> Replace Select Coverage	OwnerShield Retail Price <input type="text" value="1.00"/> Months <input type="text" value="0"/> Miles <input type="text" value="0"/> Deductible <input type="text" value="0.00"/> Cost <input type="text" value="0.01"/> Replace Select Coverage	Tender Loving Care - Platinum Retail Price <input type="text" value="566.33"/> Months <input type="text" value="0"/> Miles <input type="text" value="0"/> Deductible <input type="text" value="0.00"/> Cost <input type="text" value="79.00"/> Replace Select Coverage	Combo CLAH test Retail Price <input type="text" value="0.00"/> Cost <input type="text" value="0.00"/> Replace Select Coverage
Key Replacement - Standard Retail Price <input type="text" value="399.00"/> Months <input type="text" value="36"/> Miles <input type="text" value="0"/> Deductible <input type="text" value="0.00"/> Cost <input type="text" value="199.00"/> Replace Select Coverage	ABSOLUTE Tire & Rim Protecti... Retail Price <input type="text" value="199.00"/> Months <input type="text" value="36"/> Miles <input type="text" value="79.00"/> Deductible <input type="text" value="0.00"/> Cost <input type="text" value="0.00"/> Replace Select Coverage	Ford Protection Plan - Basic G... Retail Price <input type="text" value="0.00"/> Months <input type="text" value="0"/> Miles <input type="text" value="0"/> Deductible <input type="text" value="50.00"/> Cost <input type="text" value="0.00"/> Replace Select Coverage	Alled GAP - GAP Retail Price <input type="text" value="0.00"/> Months <input type="text" value="0"/> Miles <input type="text" value="0"/> Deductible <input type="text" value="0.00"/> Cost <input type="text" value="465.00"/> Replace Select Coverage
Tire & Wheel Protection - Pro... Retail Price <input type="text" value="0.00"/> Months <input type="text" value="36"/> Cost <input type="text" value="0.00"/> Replace Select Coverage	AFTERMARKET 1 - AFT1 Retail Price <input type="text" value="200.00"/> Months <input type="text" value="11"/> Miles <input type="text" value="11000"/> Deductible <input type="text" value="111.00"/> Cost <input type="text" value="20.00"/> Replace Select Coverage	Car Care Upgrade - Ertel Non ... Retail Price <input type="text" value="349.00"/> Months <input type="text" value="0"/> Miles <input type="text" value="0"/> Deductible <input type="text" value="0.00"/> Cost <input type="text" value="0.00"/> Replace Select Coverage	
Theft Protection - Road Hazar... Retail Price <input type="text" value="0.00"/> Months <input type="text" value="0"/> Miles <input type="text" value="0"/> Deductible <input type="text" value="0.00"/> Cost <input type="text" value="0.00"/> Replace Select Coverage	Service Maintenance Agreeem... Retail Price <input type="text" value="0.00"/> Months <input type="text" value="0"/> Miles <input type="text" value="0"/> Deductible <input type="text" value="0.00"/> Cost <input type="text" value="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 **1FTEX1CB3JFB13119** Deal Date **03/05/18** New/Used/Demo **New**
Vehicle Description **2018 FORD TRUCK F-150 2WD SUPERCAB**
Odometer Rating In-Service Date
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 **1FTEX1CB3JFB13119** Deal Date **03/05/18** New/Used/Demo **New**
Vehicle Description **2018 FORD TRUCK F-150 2WD SUPERCAB**
Odometer Rating In-Service Date
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

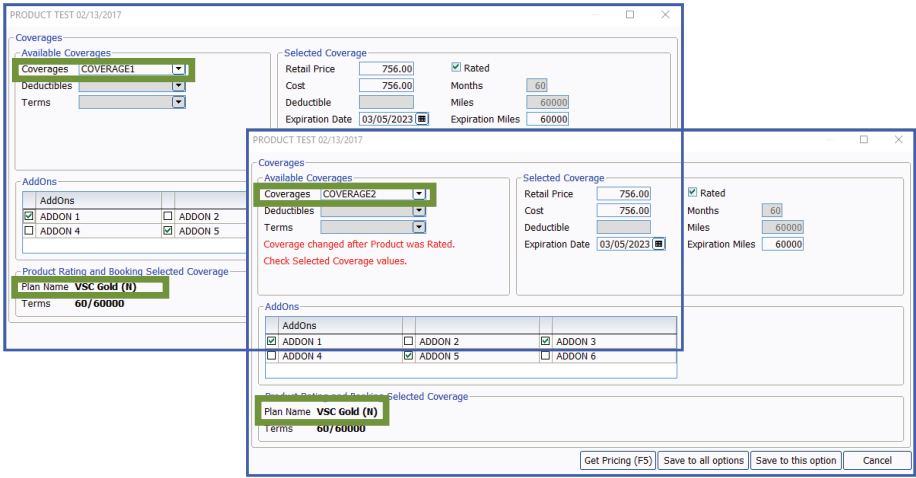
Plan	Deductible	Product Price	Surcharges	Price
<input checked="" type="checkbox"/> Basic Wrap	0.00	1262.00	<input type="checkbox"/> 1 ton or greater	320.00
<input type="checkbox"/> Bronze WEB	50.00	1062.00	<input type="checkbox"/> 4x4/AWD	300.00
<input type="checkbox"/> Discountable Regulated Plan	100.00	862.00	<input type="checkbox"/> Commercial Use	300.00
<input type="checkbox"/> Gold - New Vehicles	100.00/0.00**	662.00	<input type="checkbox"/> Diesel	75.00
<input type="checkbox"/> Gold Wrap	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"/> 36/36500			<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**

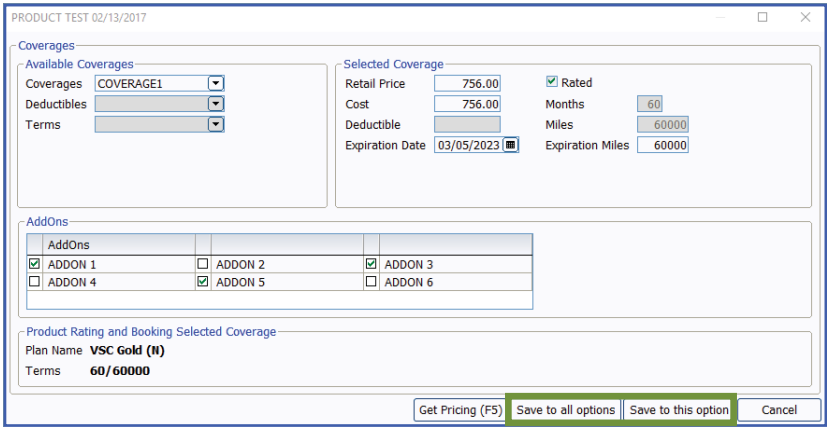
Provider Deductible Description **\$0**
 * = deductible is reduced to the listed price
 ** = deductible is reduced to zero

[Get Pricing \(F5\)](#) [Save Product \(F12\)](#) [Cancel](#)

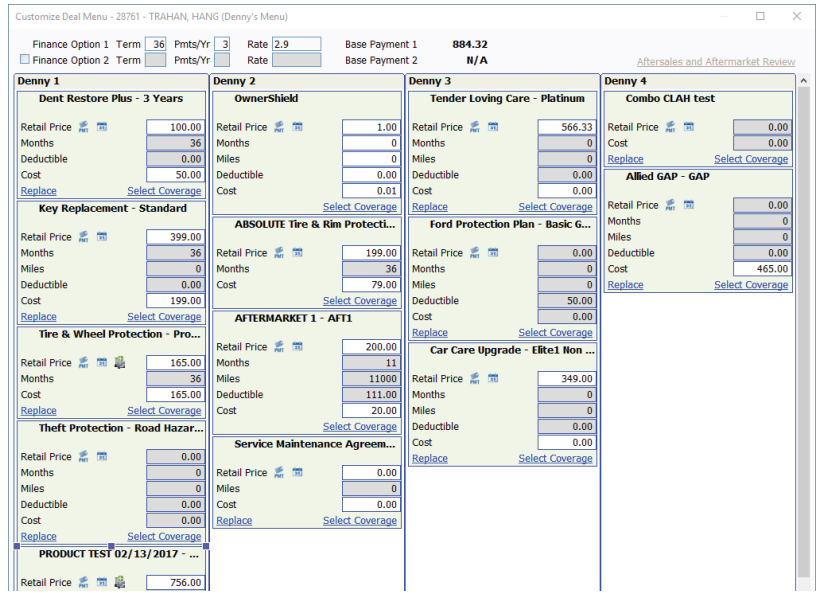
Step 3: After selecting the desired product and plan on the Product and Rating Request window, click **Save Product (F12)** to close the window and automatically enter the amounts for the selected product on the Coverage window.




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



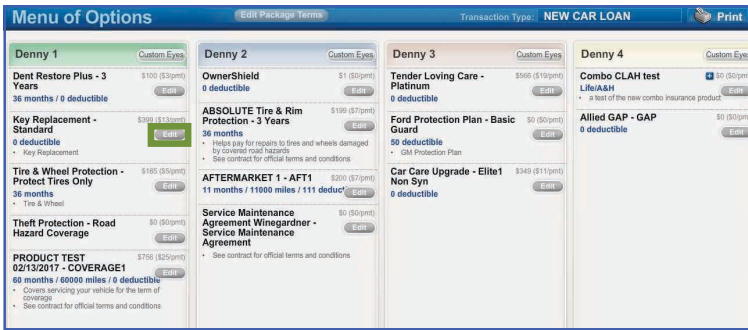
Step 4: Select Save to all options or Save to this option.



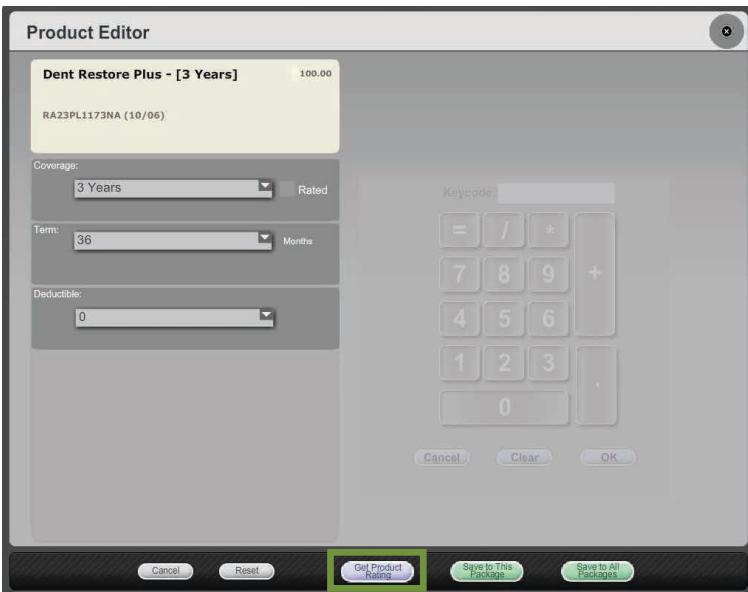
Step 5: Once all applicable products have been rated, select Ready for docuPAD (F8).

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

Rating from docuPAD – Menu of Options



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



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



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



Product Rating Request

Odometer: 15 Rating In-Service Date: 03/05/18 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 Base Product Price: \$0.00
 Form Number: N/A 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

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

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

The screenshot shows the 'F&I Forms' window with a list of forms. The 'Product Booking and Reprint' section is highlighted with a green box. Below this section, there are checkboxes for 'Sign on docuPAD', 'Select Unbooked', and 'Book Contract (F9)'.

#	Dealer Description	Type	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		

Product Booking and Reprint

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

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.

The screenshot shows the 'Additional Fields for Contract Booking' dialog box with the following fields:

Additional Fields	Enter Additional Data
Enter the Tire Size	
Enter the Tire Description	
Enter the F&I Managers Name	

Buttons: OK (F12), Cancel

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**.

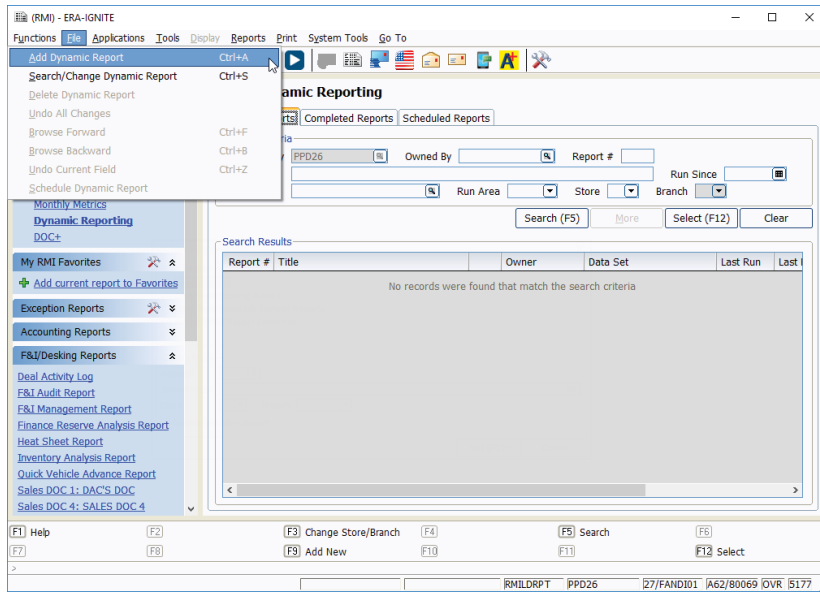
IMPORTANT

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.

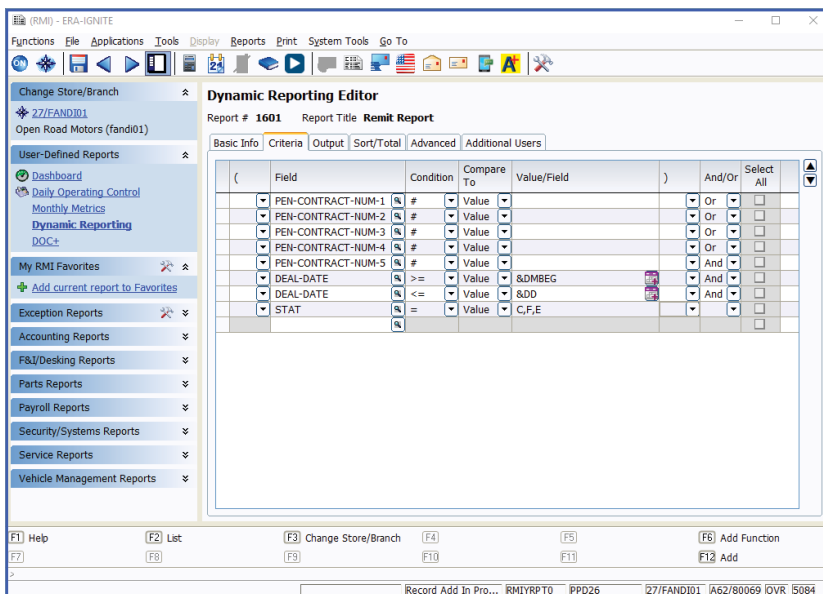
Step 1: Open the Retail Management Intelligence Application found under My Applications on the ERA-IGNITE homepage by simply clicking the  icon found on your toolbar.



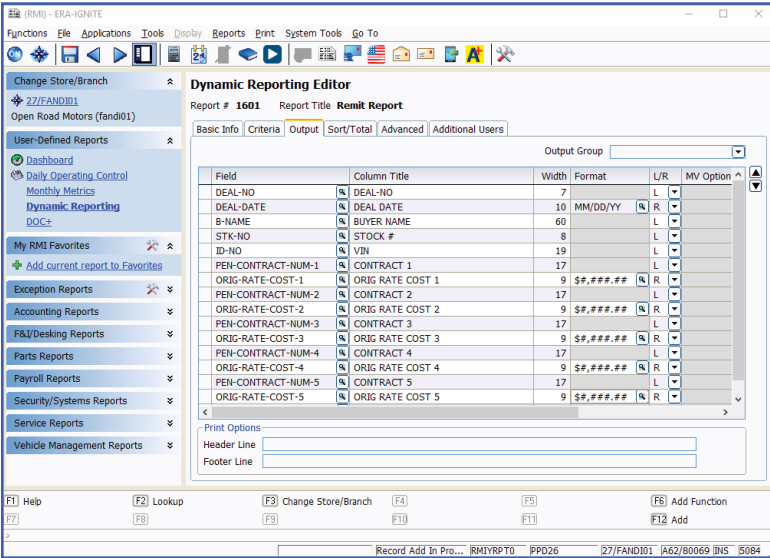
Step 2: Go to File > Add Dynamic Report. When the new screen appears, select **Blank Report** and then click **Add (F12)**.

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”

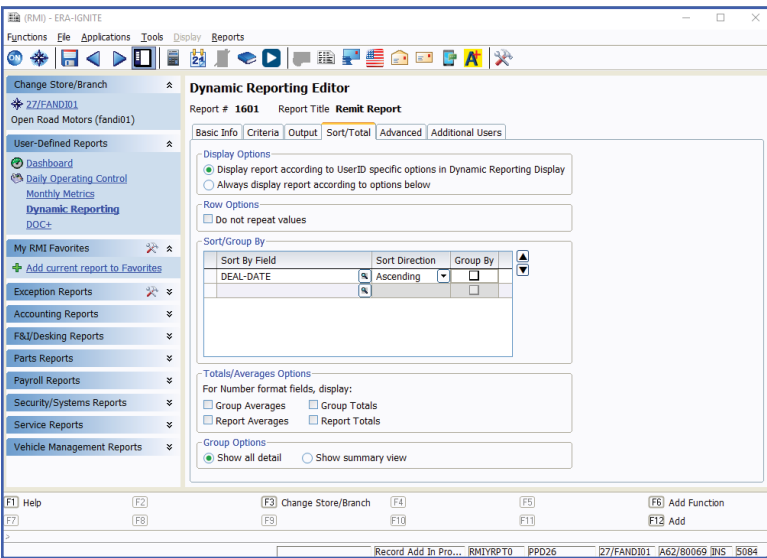


Step 4: Select the following Criteria.



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>.



Retail
Management
System

