

Product Rating and Booking

Pre-setup Checklist

This pre-setup checklist will ensure you properly register and utilize Product Rating and Booking.

The key to a successful registration and product setup is preparation!

PREPARATION

REGISTRATION

SUPPORT

DEALERSHIP

- Obtain all dealership general information (name, address, phone #).
- Identify the software being used in the F&I Office (ERA-IGNITE, POWER, the docuPAD® system, F&I Menus). ERAAccess (blue screen) does not support Product Rating and Booking.
- Identify the system administrator who will grant security access to functionality for all users.
- Make sure to review authority for users that access F&I specs used to setup integration.
- Identify all employees that will use Product Rating and Booking.
- Set a date to train employees.

PROVIDER

- Confirm the dealer is active in the provider's system/portal for eContracting.
Dealer personnel should be trained in the Portal.
- Obtain the dealer's provider-specific dealer ID.
The dealer ID will be used to register products for Product Rating and Booking in the Reynolds system.
- Product name(s).
- Retail cost + markup.



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SETUP GUIDES

Once the pre-setup checklist items are complete, [download the System User Guide](#) for step-by-step instructions on how to set up Product Rating and Booking.

Product Rating and Booking is now live and ready to use!

- Verify all actively sold products have been registered and added to the Reynolds DMS.
Warranty Vendor, GAP company, or aftermarket code have been added to the system.
- Verify menu tools have been updated with products on menu presentation (if necessary).
*F&I Menus: Dealer added products to menu using F&I Menu Designer.
docuPAD: Product added as a docuPAD product and in menus. Updated by docuPAD support.*
- Run some test deals and void the test contracts with each F&I Manager.
*Understand workflow change.
Confirm everything is setup and working properly.
Understand and confirm void process.*
- Verify integration to provider portal with F&I and accounting.
*Talk with accounting about F&I Menu eContracting and how to correct issues.
Schedule a checkpoint for the first month end to review and reconcile remittance.*

PREPARATION

REGISTRATION

SUPPORT

FOR SUPPORT ON PRODUCT RATING AND BOOKING OR ANYTHING SYSTEM RELATED, CONTACT REYNOLDS SUPPORT:



Reynolds Technical Assistance Center (TAC)

800.767.0080
Opt 3 - ERA-IGNITE DMS
Opt 4 - F&I/docuPAD



Reynolds POWER Support Center (PSC)

888.999.6348

For Resource Materials such as user setup guides, videos, and much more, visit Reynolds Product Rating and Booking page at reyrey.com/rpp

