F&I Product Rating and Booking



User Guide



Retail Management System

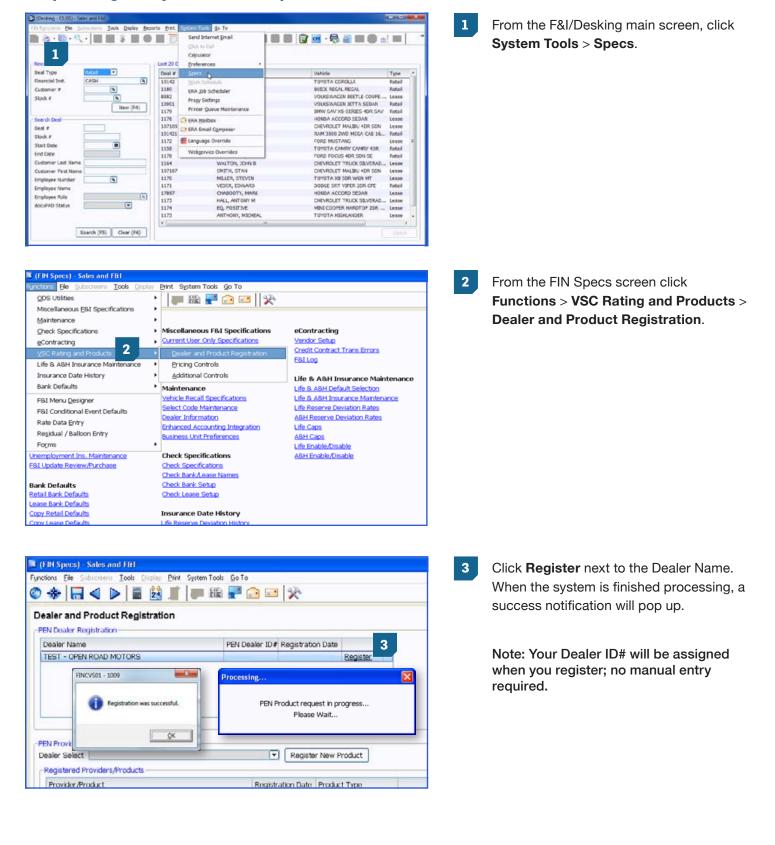


Reynolds and Reynolds' F&I and F&I Menus software solutions include F&I product rating and F&I product booking. The F&I product rating feature gives you the ability to quickly access your providers' pricing for service contracts and aftermarket products in real time from both F&I and Menus software. The F&I product booking feature gives you the ability to transmit contract details to providers and receive completed F&I forms in return.

This guide describes how to register your dealership and your aftermarket providers and takes you through the specifications for the rating and booking features so you can customize them to fit your process. It also shows 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.

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	Permission	View Only	User Group	F	To rate and book products you will need the following access: F&I/Desking → Actions Obtain VSC Rating ☑ F&I/Desking → Actions Book Abid PEN Contracts ☑ F&I/Desking → Screen Access
					VSC Rating and Product Display
User ID TESTID Full Name TESTER F1 Help F2 F3 F7 F8 F9 Esc=Return PgUp/Dn=Next Screen Ctrl=More Record Modified	MASTER F4 F10 SECSSA00 SSM	Store 01 / Bra F5 F11 01/FA	F6 F12 Update NDI01 [A25/80153 [INS 50]	77	VSC Original Rating Cost 🗹 (optional)



Step 1: Register your dealership

Step 2: Register providers and products

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04/11/12	Register	
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02/08/12	Register	
1 (*) Register New	Product	
	Register New	

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Provider Dealer ID Product Code Prefix Override

Provider ID

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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.

Close

Status

Cancel

Register (F12)

Provider Selection

Provider

AFAS

Alistate

Assurant
 AUL

CNA EasyCare

Product

AS GAP
 AS InTire
 AS Key Replacement
 AS Multi-Shield

3 IAS

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Protective

SafeGuard

Select Providers for Registration

3

AS Paintless Dent Repair

	Provider	Provider ID				
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0	Alistate	6				
Θ	American Guardian	26				
Θ	Assurant	2				
0	AUL	3				
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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.

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IMPORTANT

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

You can also contact Reynolds at 800.767.0080 for specific details.

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

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Miscellaneous E&I Specifications	· · · · · · · · · · · · · · · · · · ·	
Maintenance	•	
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Insurance Date History	Additional Controls	Life & A&H Insurar
Bank Defaults	Maintenance	Life & A&H Default Se
F&I Menu Designer	Vehicle Recall Specifications	Life & A&H Insurance
F&I Conditional Event Defaults	Select Code Maintenance	Life Reserve Deviation

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

2 Define markup percentages or amounts by product type.

Dealer Select Pricing Controls

- Select the option of setting an overall default or itemizing per specific provider/ product.
- It is possible to set certain parameters such as New/Used, Plan, Months, or Miles.
 - Note: Plan name has to be exactly as the rating would display
- Retail Price->
 - Flat Amt
 - Cost vs. List Basis
 - Markup based on % or \$
 - Rounding (ex. Next X.00 or Next X .99)
- Cost Pack % or \$
- 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

Note: Pricing Control specifications are set for each Dealer Select and also by Aftermarket, ESC, Maintenance, and GAP.

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*	Preferred Product		Aut	omatically Rate
Aftermarket	Alistate Tire And Wheel		-	
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Override After	narket Description with Provider	Plan Description		
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Save Product Pric	e to Retail Price Sale Price	Close Deal Status		

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

- 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).
- 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.

Then choose Unbooked Aftermarket Product rules.

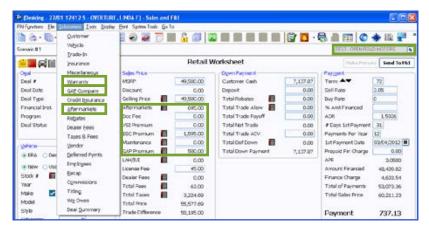
4 From the FIN specs screen, select Aftermarket Product Maintenance found under ODS Utilities. Registered provider(s)/ product(s) can be selected to default for each individual aftermarket code when rating.

Now you are ready to rate and book your products.

VSC Rating Provider			Code	Description	Tax		Profit		We Owe		Price	\$0	Cost	Ty
IAS Etch	•	2	1COENT	FIRST CLASS DENT REPAIR	Yes		8ack-End	•	No	•	0.00	0		
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IAS Tire and Wheel		. 9	1CTVM	FIRST CLASS TIRE & WHEEL	Ves	1	Back-End	•	No		0.00			
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	•	5	ALLOEN	ALLSTATE DENT & DING	Ves	-	Back-End	E	NO	•	0.00			
Alistate Paintiess Dent R		-6	DENT	DENT & DING	Yes	-	Back-End	•	NO.	-	250.00			
	•	7	U	LOSACK	Ves		Back-End	Ē	No	•	0.00			
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Product Rating

Rating from a deal record in ERA-IGNITE or Desking



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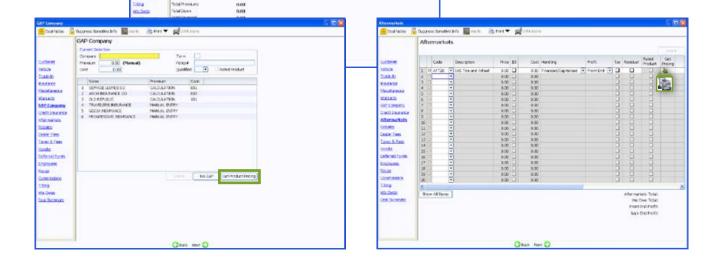
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Date

Step 1: You can rate products from the Aftermarket, Warranty (ESC), and GAP subscreens or by clicking on the corresponding icons in the deal worksheet. Access the window in the Subscreens menu that corresponds to the product. For example, access the GAP Company window to rate a GAP insurance product, access the Warranty window to rate a service contract, or access the Aftermarkets window to rate an aftermarket item.

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 new Product and Rating Request window, where product pricing can be retrieved.



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* = deductible is reduced to the listed price	
* = deductible is reduced to the listed price ** = deductible is reduced to zero	

Miscellaneous Product Opti

Surcharges

Chrome/Chrome Clad Wheels
Non-Factory Tires/Wheels

OK (F12)

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Cancel

Surcharges

Miscellaneous Rate Book Code

Lender Code

- 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.

Note: If Automatically Pull Rating was checked, 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 as necessary and click OK (F12).

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duct Price Surcharges Ouct Price

Step 5: You can turn the prompts on or off for the miscellaneous product option using the checkbox labeled 'Prompt Miscellaneous Product Options'. Also, if a price is established in a deal but rating will still be necessary for cost, check the box for 'Use Retail Price in Deal.' When the product is saved back to deal, the retail price will not be altered but the correct cost/ plan information will reflect for booking purposes.

> Note: If you choose to skip the Misc Product Options screen, selections can be missed that may result in improper ratings for certain providers/products.

oduct and Rating Request				
Vehicle unformatione 1981 SVMU3L7ATREXMedS254 Deal Date 186/08/14 Vew/Used Vehicle Description 2014 VOLKSWAGAIN REETLE COMPE 201 OFE 1.8 dometer []] Rahing In-Service Date [10/18/2014] Used Vehicles:]. Active Manufacturer Vehicle Variently []Oreg	T PZEV AT			
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		0	Set 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. 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 the vehicle stock number and deal type, may require you to re-rate or rebook the product to reflect the changes.

Rating from F&I Menus presentations

Iben Name Ben Typs Aftermarket Code UAH Type Plan Nama Months	The Protection Package Even Settings Road Hazard Wheel & Tine Protection AltherMartelation • VMIEL - WHEEL AND TIDE •	Allew Runtime Editi Allow Price Alow Price Alow Discount Alow Cost Alow Warranty Dat Alow Deductble	9 Allew Zero Frice Allew Zero Krise Allew Zero Milage a Allew Zero Milage 28 Allew Conton Tagi 29 Allew Custon Tagi	
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Discount	0.00		hazards • Potholes, metzl, nails, glass and debris	1.2
Sale Price	200.00		Sign & crive roadside assistance	
Cost	199.00		L	
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Custom Tag 2				
Provider/Product 12	S Tire and Wheel			
	Automatically Rate when Editar is selected			

F&I Menu Designer-Setups

Go to Tools > F&I Menu Designer

Within a menu, doubleclick 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.

- 40727 Date 04/11/2012 4123 MM Total Per \$115.2 Deal Number vade An fotal favo The Harager CRATS LANSON inde Barris Total Rad erc of a d event of a death. Th 0 7
- 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.

- 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

Aftermarket Code AFT18 Custom Tag 2 Retail Price 500.00 0.00 Discount 500.00 Sale Price 210.00 Cost Apply to All Package Items Get Pricing (F5) ΟК Cancel

Custom Tag 1

Tire & Wheel Hazard Protection Editor

AFTMKT 18

Tire _Wheel Hazard Protection -

Aftermarket

Product Informat						
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Rating from docuPAD – Customize Deal Menu

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.

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.

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	Price	and the second se			
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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, Value Guard must be shown in both places.

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

Ford ESP	
Coverages Available Coverages Coverages Premium Care Deductibles Terms	Selected Coverage Retail Price 1448.99 Cost 1448.99 Deductible
AddOns AddOns AddOns Product Rating and Booking Selected Coverage Plan Name EasyCare Gold:2065 - StatedCare Max	
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Deductible	0.00	Deductible	0.00				
Cast	6.00	Cost	0.00				

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.

Odometer 2 Rat Active Manufacturer Vehicle W Original Owner (Used Vehicle) Prompt Miscellaneous Produc)	14 NEW 2013 FORD FUSION 4DR 50 VIN: 3FAEPCH7000911579	N Deal Date: 06/05/14
PEN IAS GAP			
Provider/Product IAS GAP			
Product Press Get Pricing-	8	Coverage	
Deductible	Product Price	Surcharges	Price



dometer 2 Rating In-Service Date 06/ Active Manufacturer Vehicle Warranty (Used Vehicle) Original Owner (Used Vehicle) Prompt Miscellaneous Product Option Screen	06/14 NEW 2013 FORD FUELON 4DR EDN VIN: 3FARPONTEDS30895 Da	d Datas (6676 71
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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.

Product Booking and Printing

SmartFo	ens Recommended Forms					•						
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dditional Fields for Contract Booking			D
Additional Fields	Enter Additional Data		
Enter the Deal Type			
Enter the Deals Monthly Payment			
Enter the Vehicles Status (New, Used, etc.)			-
	(OK (12)	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)**.

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

Note: When "Sign on docuPAD" is checked, the PDF will load to the docuPAD workstation Forms & Documents screen where it can be signed electronically. If this is not selected, the completed contract will automatically display in a separate window to be printed and processed as usual.

If there is any missing information required to properly book a product, the Additional Fields screen will prompt you to enter the necessary info. This screen is meant to capture required info that may be missing, as specified by the provider, so forms will be filled out correctly. It also ensures that providers have all necessary info to properly service the customer.

Once booked, the completed contract form automatically displays in a separate window in .pdf format. Information for the buyer, vehicle, and product is automatically entered on the form. You can then print the form for the buyer to sign, and process it as usual. Repeat this step for each contract you wish to book.

Provider/Product	Plan/Product	Rating Price	Rating Cost	Deal Price	Deal Cost	Contract#
IAS Tire and Wheel	Tire/Wheel (Cosmetic)	500.00	200.00	500.00	200.00	334579
IAS Etch	Theft 5000 (T5000C)	286.50	86.50	286.50	86.50	334580
Xzilon Appearance Protection	EVO B Basic - New (EVO	278.95	78.95	278.95	78.95	
Yodust Type Option Driginal Rating Price (No Markup)	Aftermarket Code Original Rating	g Cost (No Pac	k)	129.00		
	Original Rating		k) Date Void			

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#
IAS Tire and Wheel	Tire/Wheel (Cosmetic)	500.00	200.00	500.00	200.00	334579
IAS Etch	Theft 5000 (T50XX)	286.50	86.50	286.50	86.50	334580
Xzilon Appearance Protection	EVO B Basic - New (EVO	278.95	78.95	278.95	78.95	
Product Type Option Original Rating Price (No Markup)	Aftermarket Code Original Rating	g Cost (No Pac	¢	129.00		
	Original Rating		70			

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 time icon found on your toolbar.

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Charge Store, France Charge Store, France Charge Store, France Charge Store, France Charge Store, France Charge Store, France Charge Store, Store, Store Charge Store, Sto		Search Report Gene Search Oriente Report Name Created by List Ran	File Name [Create Dute	K X		Select (F12) Clear
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Exception Reports 32 Accounting Reports	¥ ¥ -					
ED HHD		20	10	(F3) (F3)		E1
ED (E)		(29)	E10	P.11		F.54

Step 2: Go to the Applications > Report Generator. Once the Search screen appears, select F9 to Add New.

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 press Add (F12).

Change Store/Branch	8 A 1	teport Generator Builder					
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the Report Generator		Criteria					
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My RMC Pavorites 😥 x	X 8	PEN.CONTRACT.NUM.5		# NOT EQUAL	ē		AND -
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Step 4: Select the following Criteria.

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Step 5: Select the following Column Format.

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

- **Step 6:** Select the following Sort/Break.
- Step 7: Save the report by selecting Update (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



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