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



# **User Guide**



Retail Management System

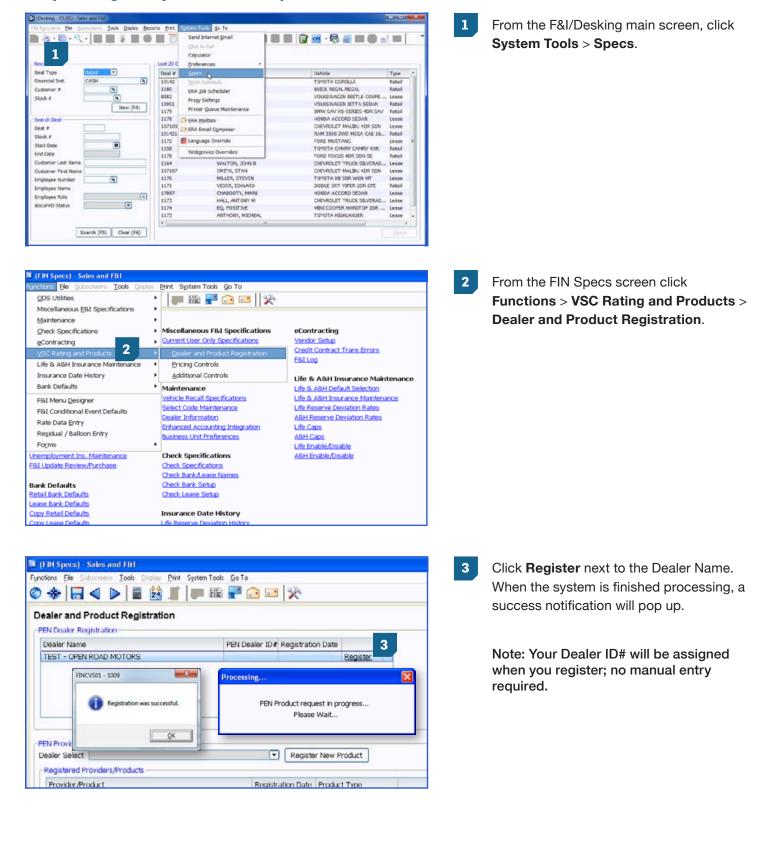


Reynolds and Reynolds' F&I and F&I Menus software solutions include F&I product rating and F&I product booking. The F&I product rating feature gives you the ability to quickly access your providers' pricing for service contracts and aftermarket products in real time from both F&I and Menus software.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

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Protective

SafeGuard

Select Providers for Registration

3

AS Paintless Dent Repair

	Provider	Provider ID				
0	AFAS	1				
0	Alistate	6				
Θ	American Guardian	26				
Θ	Assurant	2				
0	AUL	3				
0	CNA	4				
		5				
0	IAS	10				
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	IAS Theft Avert					
	IAS Phantom Footprints	Product R	egistration has been completed.	4	Complete	
	IAS Polystar 3000	-			Complete	
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4	Yo

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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Dealer Nar	ne		PEN Dealer ID4	Registratio	on Date				
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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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Maintenance	•	
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Insurance Date History	Additional Controls	Life & A&H Insurar
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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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ESC 1			•	
ESC 2	Allstate VSC		•	
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GAP	IAS GAP		•	
Override After	narket Description with Provider	Plan Description		
81 Menus		-Unbooked Aftermark	et Products	
Override Mark	up Rules	Spot Deliver Status	Warning messar	qe 💌
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.

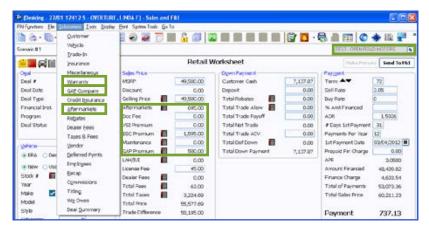
4 From the FIN specs screen, select Aftermarket Product Maintenance found under ODS Utilities. Registered provider(s)/ product(s) can be selected to default for each individual aftermarket code when rating.

# Now you are ready to rate and book your products.

VSC Rating Provider			Code	Description	Tax		Profit		We Owe		Price	\$0	Cost	Ty
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IAS Tire and Wheel		. 9	1CTVM	FIRST CLASS TIRE & WHEEL	Ves	1	Back-End	•	No		0.00			
	•	- 4	215 RA	215 RELEASE RACING STRIPES	Yes		Front-End	•	No	•	501.99		200.33	14
	•	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			
	•	8	SEAL	ELITE VEHICLE SEALANT	Wes		Back-End	•	NO.	•	0.00			
	-	9	TIRE	PREFERRED TIRE CARE	Ves	+	Back-End	Ŧ	No	-	0.00			
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### **Product Rating**

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



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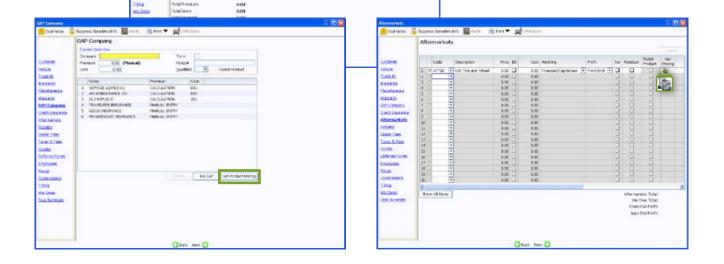
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Date

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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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.

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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	
Miles	0	Presentation File		
Deductible	0.00	22-002-19-19-19-19-19-19-19-19-19-19-19-19-19-	Item Description	100
Retail Price	200.00		Protect your tires and wheels from read	1
Discount	0.00		hazards • Potholes, metzl, nails, glass and debris	1.2
Sale Price	200.00		Sign & crive roadside assistance	
Cost	199.00		L	
Premium Markup -	O % - @ \$		Decliner Statement	
Minimum Markup	0.00			1
Maximum Markup	0.00			
Maxmum Discourt	0 %			
Maximum Discount	0.00		Disability Disclaimer	-
Custom Teg 1				
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						
Product Type Provider/Product	Aftermarket US Tire and Wheel	Alternariust Code	WHEEL	Prompt Miscellars		
Freduct		-	Deducthie	Product Price	Surcharges	Price
Tre/Whe	il (Curb, Cosmetic, Chrom il (Cosmetic, Chrome) (Bi il (Chrome) (BiLADOC)		a	300.03	Christial Origine Cled Wit-	
	f (Curb, Cosnetic, Chrom	H) (INEACOOC				

LAS GAP - Total Loss Protection         LAS GAP - Total Loss Protection         LAS GAP - Total Loss           Retail Price #         0.00         Retail Price #         0.00           Months         0         Months         0           Miles         0         Miles         0           Deductible         0.000         Retail Price #         0.00           Miles         0         Miles         0           Cost         0.00         Cost         0.00			0.00	ert Calculate of Atermarket Review Sco	Base Payne Aftersales A			Finance Option 1 Nur Finance Option 2 Nur
Retail Proce         0.00         Retail Proce         0.00         Retail Proce         0.00           Mueths         90         Months         90         Months         90           Matels         100000         Miles         100000         Miles         90           Deductble         50.00         Deductble         50.00         Deductble         50.00           Cort         0.00         Cort         0.00         Cort         0.00         Cort         0.00           AS GAP - Total Loss Protection         IAS GAP - Total Loss Protection         I		Economy		Basic		Value	1	Preferred
Muschs         Bd         Muschs         Musch         Muschs		AUL VSC - Platinum		AUL VSC - Platinum		AUL VSC - Platin		AUL VSC - Platinur
Mailes         100000         Mailes         100000         Mailes         100000         Mailes         200000         Rttail Price         40000         400000         400000         4000000         4000000         4000000         4000000         40000000         40000000000         4000000000000000000000000000000000000	0.00	Retail Price 🥩	0.00	Retail Price 🕩	0.06	Retail Price 🥩	0.00	Retail Price 🥩
Meductible     59.00 0.01     Deductible     59.00 0.02     Deductible     59.00 0.02     Deductible     59.00 0.02     Deductible       IAS GAP - Total Loss Protection     IAS GAP - Total Loss Protection - IAS GAP - Total I IS INFO - IAS GAP	8	Months	04	Months	84	Months	84	toeths
iot     0.00     Cost     0.00     Select Coverage     Select Coverage     Select Coverage     Select Coverage     IAS GAP - Total Loss Protection     IAS GAP - Total Loss       Iata finos     0.00     Retail Proc     0.00     Retail Proc     0.00     Retail Proc     Months       Mass     0     Months     0     Mass     0     Months     Mass     Mass       Setuct Coverage       IAS Time 6. Wheel Protection       IAS Time 6. Other Protection     0.00     Retail Proce     0.00     Cost     0.00       Kets     0.00     Retail Proce     0.00     Cost     0.00       Kets     0.00     Retail Proce     0.00     Cost     0.00       Kets	100000	Mies	\$00000	Mies	100000	Mies	100000	Mes
Select Coverage         Select Coverage         Select Coverage         Select Coverage         Select Coverage         Select Coverage         IAS GAP - Total Loss Protection         IAS GAP - Total Loss         IAS GAP - Total Los         IAS GAP - Total Los <t< td=""><td>50.0</td><td>Deductible</td><td>50.00</td><td>Deductible</td><td>\$0.00</td><td>Deductible</td><td>50.00</td><td>eductible</td></t<>	50.0	Deductible	50.00	Deductible	\$0.00	Deductible	50.00	eductible
LAS GAP - Total Loss Protection     LAS GAP - Total Loss Protection     LAS GAP - Total Loss Protection       atal Price     0.00     Retal Price     0.00       barbs     0     Months     0       barbs     0     Months     0       barbs     0     Mesting     0.00       barbs     0     Mesting     0.00       barbs     0     Mesting     0.00       barbs     0.00     Deductive     0.00       barbs     0.00     Cost     0.00       cost     0.00     Cost     0.00       stall Price     Select Concrage     Select Concrage       stall Price     0.00     Retal Price     0.00       stall Price     0.00     0.00     0.00	0.0	Cost	0.00	Cont	0.00	Cost	0.00	brit
Aread Price     0.00     Refail Price     0.00     Months     0.00       Nething     0     Months     0     Months     0       Nething     0     Months     0     Months     0       Nething     0.00     Months     0     Months     0       Nething     0.00     Months     0     Months     0       Nething     0.00     Cost     0.00     Months     0       Stated Coverage     Sated Proce     Sated Coverage     Sated Proce     Sated Coverage       IAS Tire 6. Wheed Protection       atal Price     0.00     Retal Price     0.00     Retal Price     0.00       Nets     0     Months     12     Months     12       Nets     0     Mains     12     Mates     0.00       Sated Price     0.00     Cost     0.00     Satest Coverage     Satest Coverage       Satest Coverage     Satest Coverage     Satest Coverage     Satest Coverage     Satest Coverage       Satest Price     0.00     Retal Price     0.00     Satest Coverage	lect Coverage	9	elect Coverage	54	Select Coverage		Select Coverage	13
Norths         O         Months         O         Months         O         Months         O         Months         O         Months         Cost         Goat         Goat <thgoat< th=""> <thgoat< th=""> <thgoat< th=""></thgoat<></thgoat<></thgoat<>	s Protection	IAS GAP - Total Los	ss Protection	IAS GAP - Total Los	oss Protection	IAS GAP - Total I	oss Protection	IAS GAP - Total Lo
Nies         Mies         Mies <th< td=""><td>0.0</td><td>Retail Price 🥩</td><td>0.00</td><td>Retail Price 🥩</td><td>0.00</td><td>Retail Price 🛸</td><td>0.00</td><td>letal Price 🥩</td></th<>	0.0	Retail Price 🥩	0.00	Retail Price 🥩	0.00	Retail Price 🛸	0.00	letal Price 🥩
eductible     0.00     Orductible     0.00     Orductible     0.00     Orductible     0.00     Orductible       stated Concepts     Salet Concepts     Sa	-	Months	0	Months	0	Months	0	onths
ont         0.00 State         Cont         0.00 State         State         Retail Proce         0.00 Months         Mass 0.00 State         0.00 Months         Mass 0.00 State         0.00 Months         Mass 0.00 State         0.00 Months         Mass 0.00 State         0.00 Months         State         Cont         State         Cont         State         Cont         State         Cont         State         State         Cont         State         Cont	-	Mies	0	Mies		Mies		Nes
Statuct Coverage         Safest Co	0.0	Deductible	0.00	Deductible	0.00	Deductible	0.00	eductible
LAS Tire & Wheel Protection	0.0	Cost	0.00	Cost	0.00	Cost	0.00	ont
atal frice ● 0.00 Kothy 12 Mosths 12 Mosths 12 Mosths 12 Mosths 12 Mosths 12 Mass 0 Mosths 0 Mos	lect Coverage	5	elect.Coverage	Se Se	Select Coverage		Select Coverage	1.1
Korthy         12         Months         12         Months         12           Miles         0         Miles         0         Miles         0           octoble         0.000         Deductible         0.000         Deductible         0.000           Satist Coverant         Satist Coverant         Satist Coverant         Satist Coverant         Satist Coverant           AS theft - 1 Year         IAS theft - 1 Year         6.001         Deductible         0.001	17	1	votection	LAS Tire & Wheel Pr	Protection	IAS Tire & Wheel	Protection	LAS Tire & Wheel
Nies 0 Mies 0 Mies 0 Mies 0 control of the second bies 0.00 Decutible 0.00 Cost 0.00 C			0.00	Retail Price 🛸	0.00	Retail Price 🛸	0.00	letal Price 爹
eductble 0.00 Deductble 0.00 Cost 0			12	Months	12	Months	12	lonths
bot     0.01     0.01     0.00       Setest Courses     24541 Courses     24541 Courses       JAS theft - 1 Year     JAS theft - 1 Year       stal Frice #     0.00			0	Mies	0	Mes	0	Mes
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LAS theft - 1 Year         LAS theft - 1 Year           stal Price ≠         0.00			0.00	Cost	0.00	Cost	0.00	lost.
atal Price 🗯 0.00 Retal Price 📽 0.00			elect Coverage	8	Select Coverage		Select Coverage	
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Anoths 12 Months 12				1.	0.00	Retail Price 💋	8.86	latal Price 🥩
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eductible 0.00 Deductible 0.00					0.00	Deductible	0.00	eductible

### 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.

duct Information duct Type GAP wider/Product (IRS GAP Product	Price	Deductible	Prompt Miscellaneo		
wider/Product [JAS GAP	Price	and the second se	Use Retail Price in (		
	Price	and the second se			
			Product Price	Surcharges	Price
n Name m Number				Base Product Price Selected Surcharges	0.00
m wumper				Total Product Price	0.00
wider Deductible Description					
deductible is reduced to the listed price					
= deductible is reduced to zero					

iduct and Fating Request				
Anicle Information     Watch Information     Watch Information     Watch Information     Watch Information     Soft ToYOTA SCION TO 4CVL ANTO     Deformate     Soft Watch Information     Adva Manufacturer Vehicle Warranty     Or     Product Type     Aftermarket     Aftermarket     Aftermarket     Aftermarket     Aftermarket	nd'Demo Bene Iginal Owner AFT1	Pranyt Miscelaner	ws Product Option	
Provider/Product SAS Tire and Wheel	• *	Use Retail Price in I	Ceal	
Preduct	Deductible	Freduct Price	Surcharges	Frice
B Tire/Wheel (Cosmetic)	a.00	169.00	12 10	67
🗹 60				
35				
Tire/Wheel				
# Tire/Wheel (Curb, Cosmetic)	-			
Fion Nome Tire/Wheel (Cosmetic)			Base Product Price	169.00
ron name (week (Koswesk) Form Number (BELAXX			Selected Sercharges Total Product Price	
Provider Deductible Description <b>50</b> * = deductible is reduced to the listed price				
** = deductible is reduced to zero		ſ	Get Pricing (PS) Save Product (PS	12) Cancel

Available Coverage     Retail Price 1060.00     Rated     Deductbles     Product Rating and Booking Selected C     Product Rating and Booking Selected	SMPP			6		
BUSINESS     HA     Terme     Coverage changed after Product was Rated.     Coverage values.     Deductible     Monfrs     Hill     Coverage values.     Deductible     Monfrs     Hill     Good     AddOns     Deduction     BUSINESS     DEDUction	Coverages Major Guard	Retail Price     Cost      Coverages     Coverages     Coverages     Coverages     VALUE GUARD	1060.00 PRated 560.00	Retail	Price 1060.00 Rated	0
Plan Name Value Guard Terms 48/50000  BUSINESS HAMMER DMERGENCY SNOWELOW	D BUSINESS D HU	Coverage changed after Proc	duct was Rated.	Month	48	
Terms 48/60000		AddOns				-
Developed Distance and Reading California Conservation		D BUSINESS	- HUMMER	0	EMERGENCY	
Plan Name Value Guard Terms 48/60000				10-		Cancel

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	
Terms 36/100000	
Get Pricing (F5	5) Save to all options Save to this option Cancel

Preferred		Value	_	Basic	1	Economy	
AUL VSC - Platinum		AUL VSC - Plathum		AUL VSC - Platnom		AUL VSC - Platin	enu
Retal Price 🥌	0.00	Retail Price 🗲	0.60	Retail Price 🥩	0.00	Retai Price 🗲	0.00
Months	84	Norths	84	Months	84	Menths	84
Mies	100000	Mies	100000	Mies	100000	Mies	100000
Deductible	58.00	Deductible	50.00	Deductible	50.00	Deductible	50.00
Cest	0.00	Cost	0.00	Cost	0.00	Cost	0.09
Select	Coverage	Select	Coverage	Select. Co	exerage		Select Coverage
IAS GAP - Total Loss Pr	otection	IAS GAP - Total Loss P	retection	IAS GAP - Total Loss Prot	tection	IAS GAP - Total	Loss Protection
Retail Price 🥌	0.00	Retail Price 🗲	0.00	Retail Price 🥩	0.00	Retail Price 🗲	0.00
Months	0	Norths	0	Months	0	Menths	0
Mies	0	Mies	0	Mies	0	Mies	
Deductible	8.00	Deductible	0.60	Deductible	0.00	Deductèle	0.00
Cust	0.00	Cost	0.00	Cest	0.00	Cest	0.00
Select	Coverage	Select	Coverage	Select. Co	systage		Select Coverage
IAS Tire & Wheel Prote	ction	IAS Tire & Wheel Prote	ction	IAS fire & Wheel Protect	ion		
Ratal Price 🧉 📓	508.00	Retail Price 🛸 📓	508.60	Retail Proce 🥩 📓	500.00		
Montha	60	Norths	60	Months	60		
Mies	0	Nies	0	Mies	0		
Deductible	8.00	Deductible	0.00	Deductible	0.00		
Cest	200.00	Cost	200.00	Cost	200.00		
Select	Constage	Select	Contrage	Select. Co	neringe		
IAS Theft - 1 Year		IAS theft - 1 Year		-			
Retail Price 🥩	0.00	Retail Price 🗲	0.00				
Months	12	Norths.	12				
Mies	0	Mies	0				
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 <b>(6676</b> 71
GAP		
oduct Information		
rovider/Product IAS GAP		E.
roduct GAP 0-84 - GMAC/Ally	Coverage 999	2
Deductible Product Price 0.00 219.00	25	Price
en Name GAP 9-44 - CANACINIY em Nambur (21689)	Base Product Price Selected Surcharges	\$219.00 \$0.00
deductible is reduced to the list price	Total Product Price	\$219.00
deductible is reduced to the list price     deductible is reduced to zero     Cancel		-
roduct Editor PEN IAS GAP - [Total Loss 210.00]	Total Product Price	-
• eductible is reduced to the list price • eductible is reduced to zero	Total Product Price	-
• eductible is reduced to the life price • eductible is reduced to zero Cancel roduct Editor PEN IAS GAP - [Total Loss 210.00 Protection] 210.00 Copy of BMGP (05/10)	Total Product Price	-
• educitible is reduced to the list price • deductible is reduced to zero Cancel roduct Editor PEN IAS GAP - [Total Loss 238.00 Protection] Copy of IBMGP (05/10) Compare Total Loss Protection	Total Product Price	-
- aductible is reduced to the life price - deductible is reduced to zero Cancel Con	Total Product Price	-
- debuttible is reduced to the list price - debuttible is reduced to zero  Concol  Co	Total Product Price	-
	Total Product Price	-
- debuttible is reduced to the list price - debuttible is reduced to zero  Concol  Co	Total Product Price	-
	Total Product Price	

Hesel

Canos

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					•						
Deale	r Description 🔘 Standard De	scription										
	Dealer Description	44	Type	Status		Custom	Category	1	Preview	Void	Internal	T
26	DUE BILL/WE OWE (NO REV)		Impact/DP				MISCELLA	NEOUS	Preview			1
51	ETHOS GAP ADDENDUM (NO I	REV)	docuPAD				GAP INSU	RANCE	Preview			
3 6	LAW 228RS ATPI (01/00)		Impact/DP				AGREENE	NT TO PROVIDE	Ereview			
3 22	LAIV 228RS ATPI (01/00)		Impact/DP				AGREENE	NT TO PROVIDE	Frendens			
23	LAW 228RS ATPI (01/00)WDF	P	decuPAD				AGREEME	NT TO PROVIDE	Exercitory			
3 7	LAW 553 ARB-CA EPS (07/12)	OP (	docuPAD				RETAIL C	ONTRACT	Preview			
28	LAW 553 ARB-CA EPS14 (07/	12)	docuPAD				RETAIL C	ONTRACT	Enewiew			
29	LAW 553 ARB-CA EP514 (07/	12)W	docuPAD				RETAIL C	ONTRACT	Ermine			
12	LAWCA 177 NTC (04/12)		Impect/DP				MISCELLA	NEOUS	Freedow			
10	LAWCA 177 NTC (04/12)WDP		docuPAD				MESCELLA	NEOUS	Frederic			
25	LAIWCA CONT CANC AG (04/1	2)	Impact/DP				MISCELLA	NEOUS	ETENIEW			
27	LAIWCA FRE CONT DISC (07/1	12)	Impact/DP				MISCELLA	AEOUS	Freview			
24	LAWCA USED VEH DISC (04/1	12)	Impact/DP				MISCELLA	NEOUS	Ereview			
32	LAWCA-DMGDSCL-N (04/12)		Impact/DP				MISCELLA	MEOUS	Preview			
18	LOJACK ACCEPT FORM (02/1)	1)	docuPAD				AFTERMA	RKET	Preview			
20	MINI GAP PROTECTION (05/1	0)	Impact/DP				GAP INSU	RANCE	Preview			
1 19	MINI TIRE & WHEEL AG (05/0	9)	docuPAD				AFTERMA	RKET	Freview			
48	NISSAN SEC + EPP (05/12)		Impact/DP				ESC / WA	RRANTY	Preview			
3 8	PWR MAPPING DOC (NO REV)		docuPAD				INTERNAL		Exercitence		Send to DPS	ŝ
13	SAFE-GUARD BMW ETW (07/	12)	Impact/0P				AFTERMA	RKET	Engline			
1 14	SAFE-GUARD MINI ETW (07/1	12)	Impact/DP				GAP INSU	RANCE	Preview			
40	SEQUIDA MAINTENANCE (07/	13)	docuPAD				ESC / WA	RRANTY	Ecentery			
Skip I	6dden Prompta 🛛 docuPAC	Forms (	only				Refr	resh (F5) Prepare	e docuPAD	Forms (F8	5) Print (F1)	0
Print Q	URUE											
7,17,												
C Sele	ect All Forms 🛛 Print All Impe	stt/DP Fo	rms as docul	AD C	Print All Pag	e5			Frint Deale	r Conias	Print Queue	Ï
								-	CITER Deale	r copies	Print Queue	
Aftern	arket Product Booking and Rep	ant.							1.1			
	ovider/Product	Plan/Pr	oduct	-	Contract	Provid	der Status	docuPAD				
DW	S Tire and Wheel	Tire/W	heel (Cosme	tic)		-						
	S Etch		000 (T50)OC						P and	an docuP	140	

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 <b>Option</b> 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 <b>Option</b> 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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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).

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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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