Did you know?

You can electronically rate and book products in real time via Reynolds' ERA and POWER DMS.

Today's process is now automated and electronic.
How does that benefit you?

- Accurate and instant product rates available within the DMS.
- Automatic access to the correct provider forms.
- Immediate electronic delivery of completed contract data.
- Eliminate errors due to incorrect forms and information.
- Simplify contract printing onto plain paper.
- Eliminate re-keying contract data into multiple systems.
- Increase customer satisfaction with quicker contract registration.

What Reynolds' solutions will have the ***F&I Product Rating and Booking*** functions?

Rating and Booking not available in 'Blue Screen'

- Desking
- ERA-IGNITE F&I
- F&I Menus: Must have Desking or ERA-IGNITE F&I to book contracts.
- docuPad

To verify your system or for assistance in getting setup:

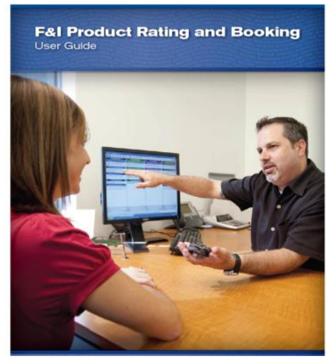
- Please contact your Reynolds' Account Manager or
- Call the Reynolds & Reynolds Technical Assistance Center at 800.767.0080

Getting Started – Product Rating and Booking within Reynolds' DMS

Verify dealer's system has functionality → Complete provider requirements → Set registration and profit control permissions → Set rating and product booking permissions

For information about product rating and booking within Reynolds' ERA-IGNITE F&I, Desking and F&I Menus, please refer to my.reyrey.com, keyword search ZB002, KP: 21 What's New in ERA, page 51.

Download the F&I Product Rating and Booking user guide from:
www.reyrey.com/solutions/rpp.asp



Step 1

Verify the dealer has the necessary DMS system:

- If the DMS has a GUI (graphical user interface), then it has the rating and booking functions.
- If the DMS is 'blue screen' based and keyboard driven, then the dealer needs to contact their Reynolds Account Manager to discuss options.

If necessary, update or verify the system through Reynolds:

- Contact your Reynolds' Account Manager or
- Call the Technical Assistance Center at 800.767.0080.

STEP 2

Please contact your Provider to:

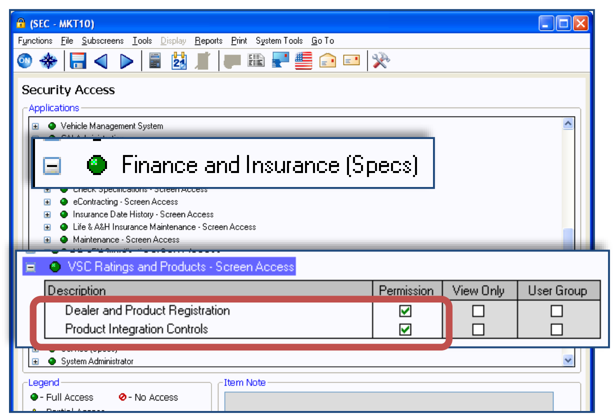
- Complete all agreements and pricing information and
- Request the Dealer ID needed for registration within the Reynolds' DMS.

Note:

- The dealer must have a valid Dealer Number in order to complete registration of products in the DMS.

Step 3

Within the DMS, set the necessary permissions to perform any registration, product pricing or profit control functions.



- In the Security Access window, click **Finance and Insurance (Specs)** > **VSC Ratings and Products – Screen Access.**
  - ❑Dealer and Product Registration
  - ❑Product Integration Controls

STEP 4

Set the product rating and booking permissions:

- **F&I/Desking -> Actions**
  - ❑Obtain VSC Rating
  - ❑Book/Void PEN Contracts
- **F&I/Desking -> Screen Access**
  - ❑VSC Rating and Product Display
- **F&I/Desking -> Aftersales – Fields**
  - ❑VSC Original Rating Cost (optional)

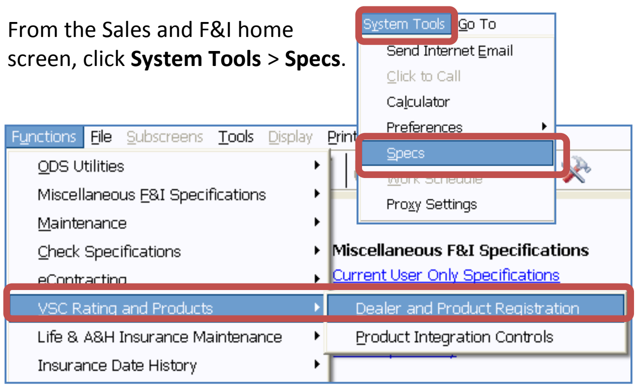
If you experience any problems or require further assistance, please contact Reynolds Support at 800.767.0080.

Dealer and Product Registration

Navigate to Dealer and Product Registration → Register the Dealership → Begin Product Registration → Register the Products → Select the Product Type

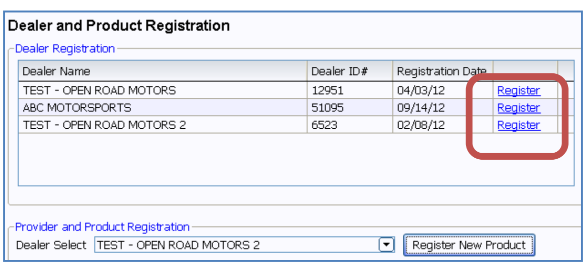
STEP 1

- From the Sales and F&I home screen, click **System Tools** > **Specs**.



- From the top menu bar, click **Functions** > **VSC Rating and Products** > **Dealer and Product Registration**.

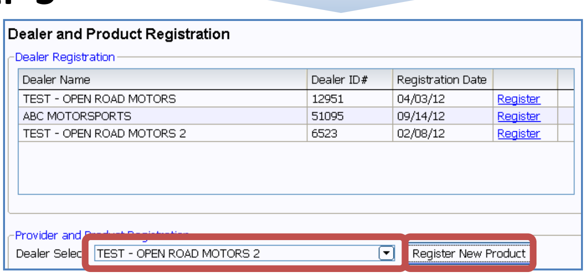
STEP 2



- Click the **Register** link next to the dealer's name.
- Click the **OK** button in the success pop up box.

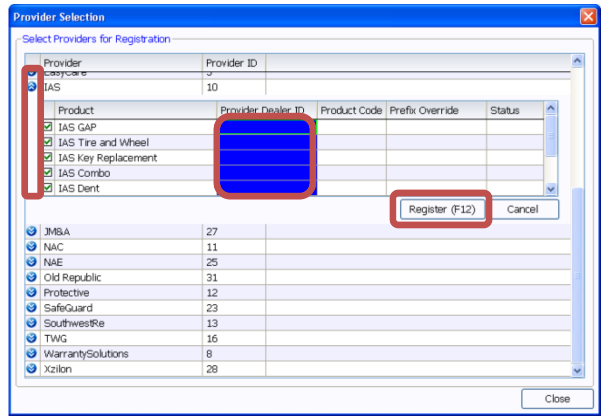
Note: Your Dealer ID# will be assigned when you register. No manual entry required.

STEP 3



- Click the down arrow next to the **Dealer Select** field and select the dealership name.
- Click the **Register New Product** button.

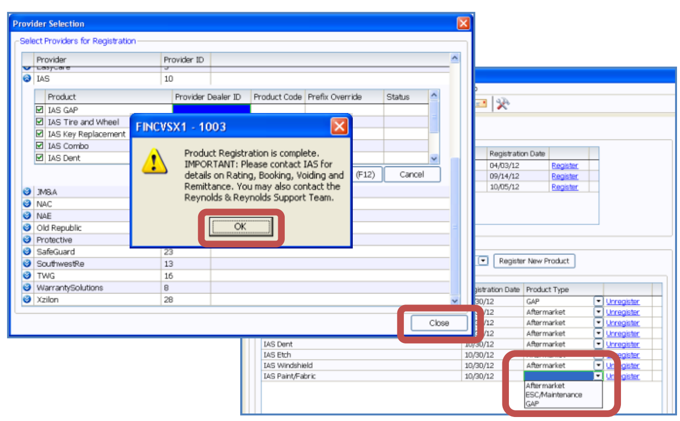
STEP 4



- Click the double arrow on the left of the provider's name to display that provider's products.
- Enter the Provider Dealer ID (dealer number). Uncheck the box for products you do not want to register.
- Click the **Register (F12)** button.

Note: Contact the provider or your agent if you do not know your Provider Dealer ID.

STEP 5



- Click the **Ok** button in the Registration Complete pop up box.
- At the bottom of the Provider Selection screen, click the **Close** button.
- On the Dealer and Product Registration screen, select the appropriate Product Type for each registered product.

Note: The Product Type determines under what category the product will display in the rating screens.

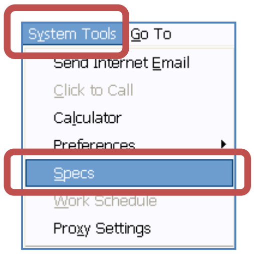
If you experience any problems or require further assistance, please contact Reynolds Support at 800.767.0080.

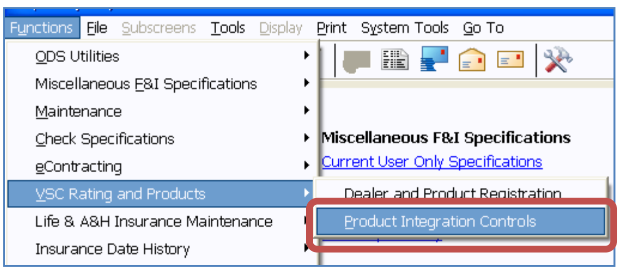
Product Pricing and Profit Margins

Navigate to Product Integration Controls → Select the Dealer and Product Type → Set Product Pricing Controls → Set the F&I Menus Controls

STEP 1

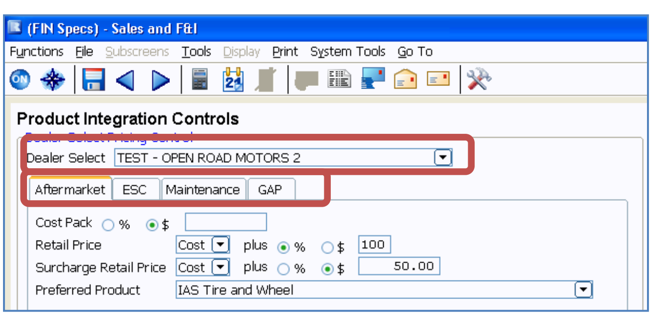
- From the Sales and F&I home screen, click **System Tools** > **Specs**.





- From the FIN Specs screen, click **Functions** > **VSC Rating and Products** > **Product Integration Controls**

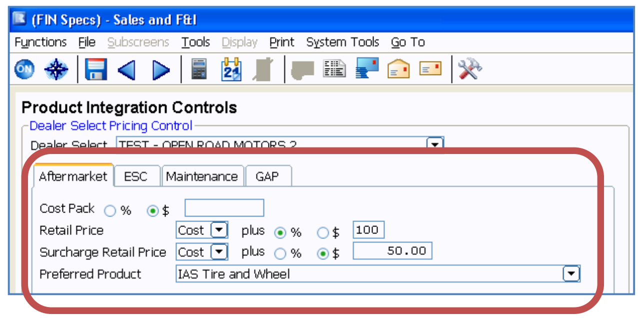
STEP 2



- Click the **Dealer Select** down arrow to select the dealer.
- Click the product type tab (**Aftermarket**, **ESC**, **Maintenance**, **GAP**) to display that product type's controls.

STEP 3

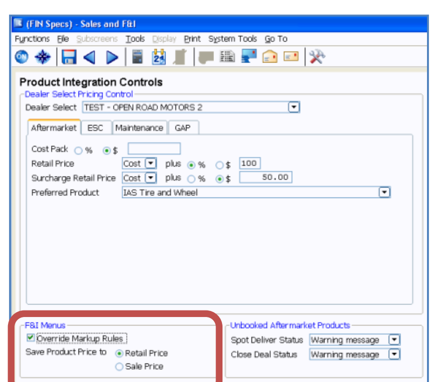
For **Aftermarket**, **ESC**, **Maintenance** and **GAP** product types, you can set different pack amounts for product options.



- For **Cost Pack**, select the % or $ pack option, and then enter the percentage or dollar value in the blank field.
- For **Retail Price** and **Surcharge Retail Price**, select whether to pack based on Cost or List, and then enter the % or $ pack value.
- For **Preferred Product**, click the down arrow to select the default product that displays in the Product and Rating Request screen.

STEP 4

F&I Menu Controls determine if the Menus' markup rules are used. For example, if the product is marked up $500 but Menus has a $200 markup limit, you will want to override the Menus markup limit.



- Check **Override Markup Rules** to override the Menus' markup.
- Select the Menus' Product Price option (**Retail Price** or **Sale Price)**.

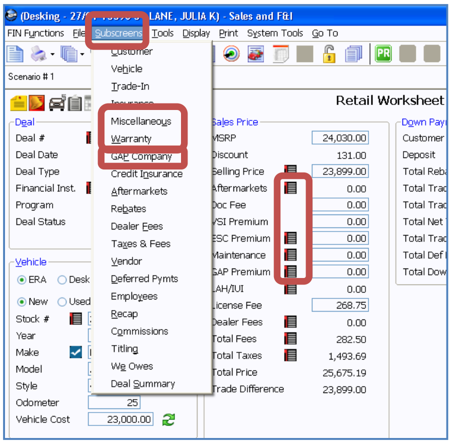
<u>Note</u>: If applicable, Retail Price is the price before the Menus' discount has been applied, and Sale Price is the price after the Menus' discount has been applied.

If you experience any problems or require further assistance, please contact Reynolds Support at 800.767.0080.

Product Rating in ERA-IGNITE or Desking

Select the Product Type to Rate → Begin Product Pricing → Get Pricing → Save Options and Rates

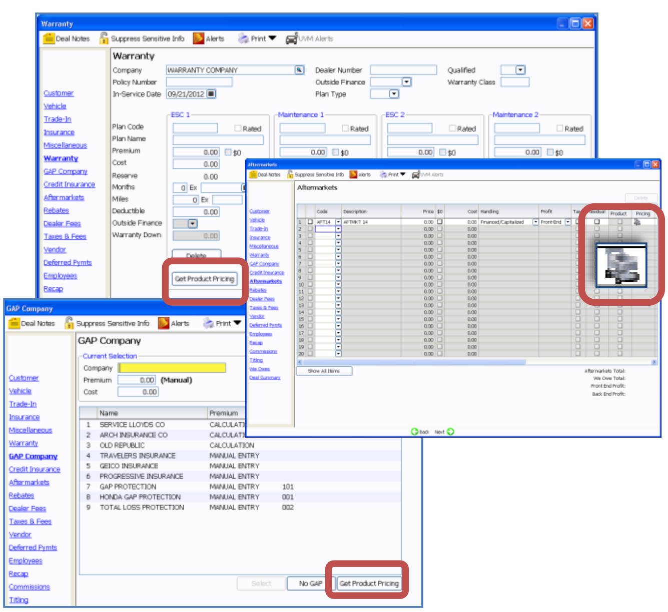
STEP 1



- Click the **Subscreens** menu and select the appropriate product type (Warranty, GAP Company, Aftermarkets) or click the product type icon in the Retail Worksheet.

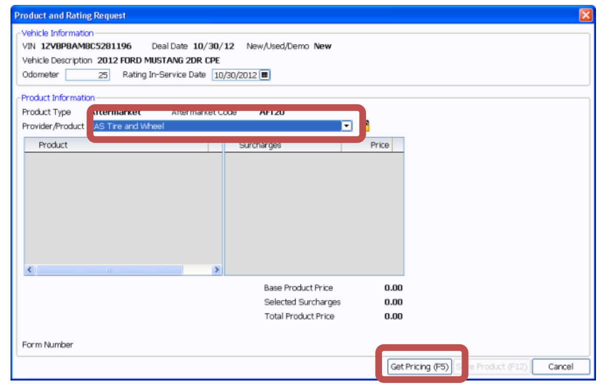
Note: VIN, Mileage, and Deal # are required to rate products.

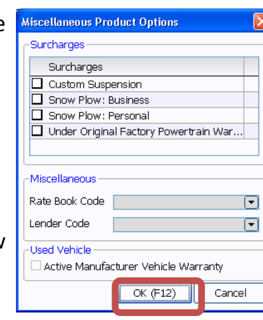
STEP 2



- 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.

STEP 3



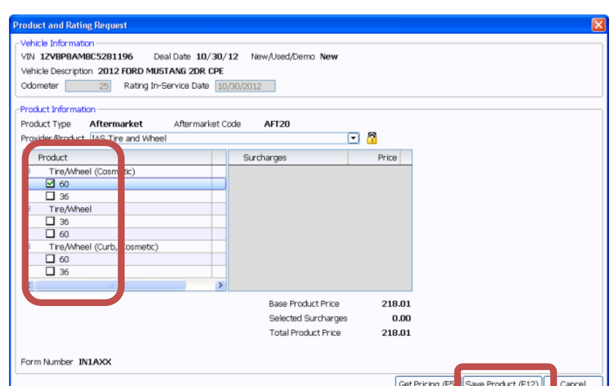


- In the Provider/Product field, click the down arrow to display registered providers.
- Select the provider and product you want to rate.
- Click the **Get Pricing (F5)** button.

If surcharges may apply, the **Miscellaneous Product Options** window displays.

- Select the appropriate surcharges.
- Click the **OK (F12)** button.

STEP 4



- Under the **Plan** column, click the plus sign next to the product plan to display policy options.
- Click the policy option to select the appropriate terms.
- Click the **Save Product (F12)** button to add the product to the deal.

Note: Changing certain details in the deal record, may require you to re-rate the product.

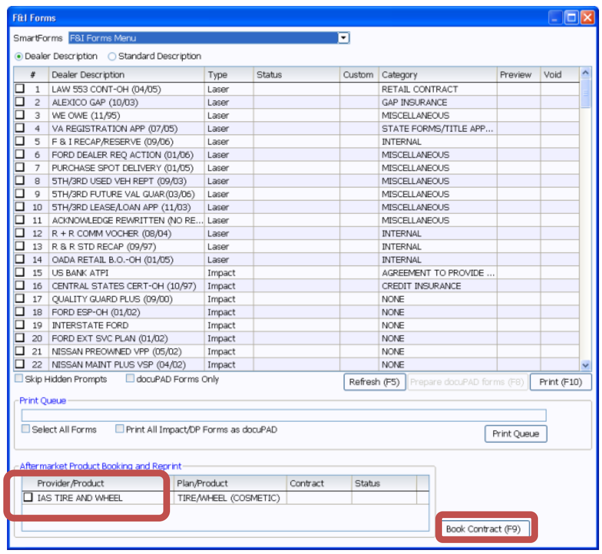
If you experience any problems or require further assistance, please contact Reynolds Support at 800.767.0080.

Product Booking and Contract Voiding or Reprinting

Select and book product → Complete missing date → Print completed contract → Void or reprint a contract (if necessary)

STEP 1

After a product is added to a deal, the contract can be printed from the **F&I Forms** window or by navigating to **Display > VSC Rating and Products.**

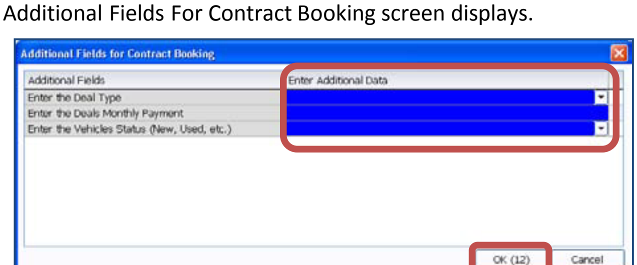


- Select the product to book.
- Click the **Book Contract (F9)**.

Note: If the label ‘Rating Only’ displays for the provider, the contract cannot be booked within the Sales and F&I application. Follow the provider’s specific procedures to book the product.

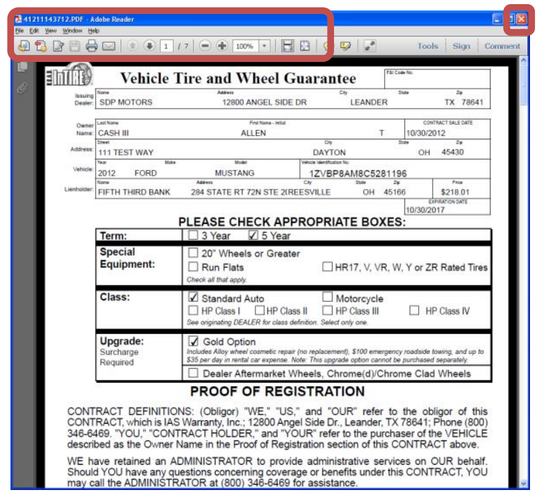
STEP 2

If missing or additional data is required to book a product, the Additional Fields For Contract Booking screen displays.



- Enter the needed additional data.
- Click the **OK (12)** button.

STEP 3

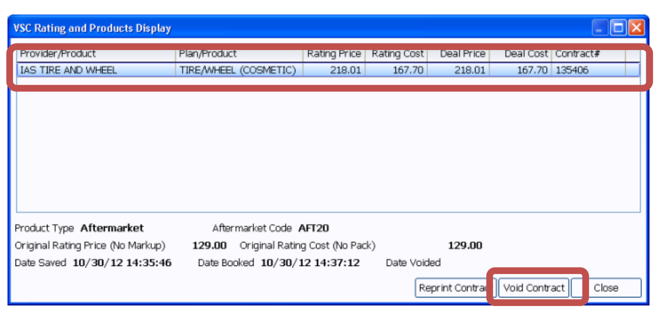


After the contract is booked, the completed contract form automatically displays in a separate window.

- Print the completed form.
- Close the window.
- Repeat Step 1 thru Step 3 for each contract you wish to book.

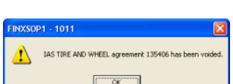
Void or Reprint a Contract

If necessary, you can void the contract from the VSC Rating and Products Display window.



- From the top menu, click **Display > VSC Rating and Products**.
- Click the product to select it
- Click the **Void Contract** button or **Reprint Contract** button.

Note: If the provider does not allow electronic voids, a message displays informing you to contact the provider. Contact the provider for specific rules and procedures about voiding or cancelling a contract.



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