

PCRS+ TRAINING GUIDE Contract Cancellation & Void





LEGEND

As you navigate this guide, you will come across several icons that signify general, important, and critical information. These icons are specifically designed to draw your attention to essential details related to the tasks you are performing within the PCRS+ system. Below is a legend explaining the icons and their significance.





Introduction

PCRS+ provides visibility to view contracts entered based on specific filtered criteria.

Guide leads you through the steps necessary to void and cancel a contract in the Policy Claims and Reporting Solutions (PCRS+) for Warranty Solutions.

This guide will cover:

- Cancel Contract
- Void Contract

Disclaimer

This guide is created by and specific to the Warranty Solutions Program. All numbers are for demonstration purposes only. Portions of this training are from PCMI Corporation's PCRS software. All rights reserved.



Contract Cancellation

Contract Cancellation can be performed in the PCRS+ system directly from the View Contract screen by those individual users that have the necessary permission.



Users with this access are ONLY allowed to cancel themselves within 60 days of written date of the contract. After 61 days, they must follow the standard cancellation process which would be email cancellation request from/documents to <u>selectadmin@amyntagroup.com</u> for processing.

 Search for the contract you wish to cancel. Select the contract by clicking the Contract Number to open in View Contract mode.

Contra	acts		
Dealer 123456AZ	- Arizona Test		Prode (All)
Status	Contract M	lumber	
(All)	* 50 VSC-100	000218	

2. From the main contract view, select **Action** then **Cance** to start the Contract Cancellation Process.

General					Voluce Information	ion -	
Contract Number 1 VSIC 10000218	Reference	Deal #	Back #	Balance SIL-DO	1015404LAPR18	1810	tence age "per " Neter
Nex 244 03/06/2024	ndente-bete 06/06/2023	8%x7=14% 05/06/2024	Surancian 05/06/2021	Blactory 05/06/2024	1941° 2020	CADELAC	BIGALADE SPORT.
tasi birndar 12,500		diffective Columnitier 112,500	Bapinatur-Datematur 112,500	Bagaran Satisat		Color	twice two bey 02/06/2024

3. The **Cancel Contract** screen will launch and display all relevant information for Canceling the selected Contract.

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A. Cancel Screen header bar and options.



ancel Contract							
Record As Of Today - (New) ¥	Recalculate	Save Quelle	Cascal Contract	Email Admin	Print	Upload File	Close

a) Contract warning message(s) will display here, if applicable.

Please note there are 1 claim (s) on this contract

Record As Of: Today - (New) V

Print

Email Admin

b) Record As Of: will default to Today for new cancellation or the date may be selected for Cancellation that were started previously and saved.

c) Action buttons available once the required Contract information is populated.

B. Contract Information: Displays all information on the written contract, including Customer and Dealer Information.

Contract Number	VSC-10000218
Sale Date:	03/06/2024
Effect/Exp Dates:	03/06/2024 - 03/06/2031
Sale Odom:	12,500
Effect/Exp Odom:	12,500 - 112,500
Coverage:	Platinum - New (Term 84/100,000)
Claims:	Open Count: 0 Paid Count: 0 Paid Total: \$0.00
Customer:	ALICIA HUEBEL 14800 TRINITY BLVD FORT WORTH, TX 76155 (817) 785-6700
Dealer:	Arizona Test 23606 N. 19TH AVE. PHOENIX, AZ 85085 (623) 879-0800
Agent:	TEST AGENT main 1030 HIGGINS RD PARK RIDGE, IL 60068 (402) 999-9117

Upload File

Close

C. Cancellation Information: Enter all required information on fields indicated with the *.

Based on the cancel date, reason and cancel odometer, the correct **Cancel Method** will populate and calculate the proper cancellation amount due.

Cancellation details will display based on the appropriate **Cancel Method** applied.

Cancel Report Date	05/30/2024	
Cancel Effective Date	* 05/30/2024 Cancel Odom *	15,000
Cancel Reason	* Admin Cancel	~
Cancel Method	* Pro-Rata1	¥
Cancellation Details Cancellation Instructions	Cancellation Reason: Admin Cancel, 61-9999 Method: Pro-Rata1, Selected Method: Pro-Rat \$75.00 of Retail if lesser, Seller Fee 0.00 % if I Based on: Sale Date	days, Default a1, Customer Fee esser



- **D. Payee Information:** Displays the default payee information that cancellation monies due will be paid to. Based on user permission you may change the default Payee Type.
- E. Calculation Details: The first section displays original amounts and the calculated amounts of the refund due based on applied Cancellation Method for this coverage. Retail Refund Totals are displayed.

F. Refund from Dealer

section displays Dealer portion of refund amounts due based on Cancellation Method for this coverage. Includes any Dealer Cancellation Fees and No Chargeback amounts that may be applicable to the Dealer.

G. Refund Summary:

Summary of calculated refund amounts due from TPA and Dealer as well as the Refund Total based on Cancellation Rule applied.

Payee Type	Dealer V Pay Method ACH	~
Name	ARIZONA TEST	
Country	UNITED STATES	~
Address 1	23696 N. 19TH AVE.	
Address 2		
Postal Code/State/City	ESOAS AZ PHOENIX	Verify

	Original	Adjusted	
actor (Odometer)	97 500 %	97.500 %	
actor (Month - 96.674 %)			
Refail Cost	\$2,213.00	\$2,213.00	
	Sector Sector		
letail Refund Base	\$2,157.68	\$2,157.68	
Cancellation Fee	-\$75.00	-\$75.00	
Paid Claims Deduction	50.00	50.00	
Retail Refund (w/out TAX)	\$2,082.68	\$2.082.68	

Refund from Dealer		
Dealer Remit	\$1,213.00	
Markup	\$1,000.00	\$1,000.00
Factor applied	\$975.00	\$975.00
Dealer Cancellation Fee	\$0.00	\$0.00
Non-refundable	\$0.00	\$0.00
Dealer No Chargeback	\$0.00	\$0.00
Refund from Dealer (w/out TAX)	\$975.00	\$975.00
Refund from The Amynta Group (w/out TAX)	\$1,107.68	\$1,107.68

Refund Summary	
Refund from Dealer	\$975.00
Refund from The Amynta Group	\$1,107.68
Retail Refund Total	\$2,082.68



4. Once the required information is entered, your process buttons will become available providing you with various options in the Contract Cancellation process.

	Α	В	С	D	E	F	E
Record As Of: Today - (New) 💙	Recalculate	Save Quote	Cancel Contract	Email Admin	Print	Upload File	Close

- A. Recalculate: Select to refresh and display updated calculations when any changes are made to the displayed amounts, cancellation methods, etc.
- **B.** Save Quote: Allows you to save a cancellation as a "quote" to retrieve later and complete.

Saved quotes appear in the Record As of Drop-down list for retrieval.





C. Cancel Contract: Initiates the Cancel Contract process.

You will be presented with a check message requiring you to select Yes to proceed with the cancellation, or No to top the Contract Cancellation process and return to the Cancel Contract screen.

Selecting Yes will immediately cancel the Contract and display the following message in the upper left corner of the contract.











You must have permissions to cancel contracts. Permissions are provided by your system administrator, please check with them to secure the proper permissions.

D. Email Admin: In some cases, permissions may require that you Email the designated cancellation Admin to complete the contract cancellation process. If this is a requirement, the Email Admin will be available (blue).

The following message will display when you attempt to Email the Administrator without saving the quote first. **Save the Quote** and proceed with **Email to Admin.**





You must save the Quote before an Email to the Administrator can be sent. Please save and try again.

- E. Print: Allows you to print the Contract Cancellation form, if cancellation form(s) esxists. This will display as a .pdf document on your screen. You will need to SAVE QUOTE before printing.
- **F.** Upload File: Allows the uploading of file(s) to th ecancelled contract before or after cancellation has been completed.
- **G.** Close: Select Close to exist the Contract Cancel screen and return to the contract. Selecting Close WILL NOT initiate a save of the contract, be sure to Save Quote prior to existing to save any data entered.



5. The contract will now display and be classified with a status of cancelled.





Void Contract

A **Pending** contract is **Voided** to correct a mistake such as the contract was entered by mistake or maybe under the incorrect Dealer. A contract would also be **Voided** if the customer wanted to buy the contract, but then changed their mind so the Dealer needs a voided record.



VOID contracts is only available for unpaid contracts. If they find that a contract was paid for in error and within 60 days of written date, they can cancel. If after 61 days, email <u>selectadmin@amyntagroup.com</u> for processing.

 Search for the contract you wish to cancel. Select the contract by clicking the Contract Number to open in View Contract mode.



2. From the main contract view, select Action then Void to start the Contract Void Process.

←C	ONTRAC	T: VSC-1000040	PENDING-NOT-FUNDED	CURRENCY: \$ TYPE: VSC	F&I MANAGER: DEALER: 123456AZ - Arizona Test				
MAIN	TRANSACTIONS								⊖ Void
		General				1	Vehicle Information		
		Contract Number * F VSC-10000403	teference De	al #	Stock #	Balance \$0.00	VIN * 3MVDMBBM9PM584907	Vehicle Age Type ' New	

3. Select Void to complete the Void presents the Void confirmation screen.



The contract status will change to Voided. Note you will <u>not</u> be able to change the status once the contract has been Voided.

