



**WARRANTY SOLUTIONS<sup>®</sup>**

AN AMYNTA COMPANY

# **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.



General reminder to save your changes before moving on to the next step.



General information/reminder relevant or specific to the current step.



Important information/reminder relevant or specific to the current item of focus and/or must be completed before proceeding.



Critical information/reminder that must be completed prior to proceeding. The highest level of attention must be paid to this information.

# 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.

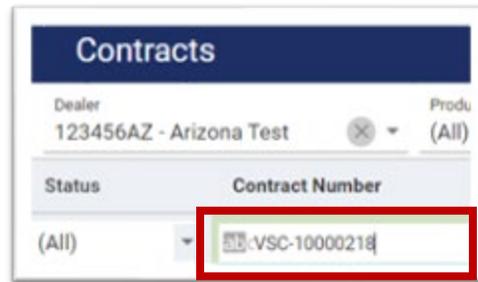
## Contract Cancellation

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

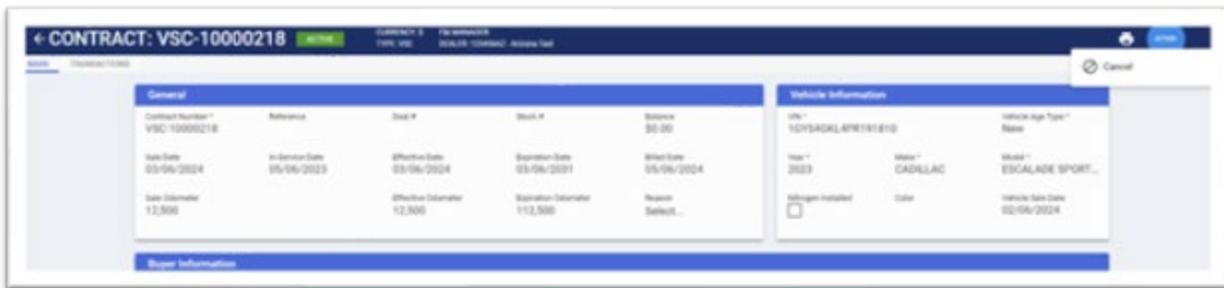


Users with this access are **ONLY** allowed to cancel themselves within 60 days of written date of the contract. After 61 days, they must follow the standard cancellation process which would be email cancellation request from/documents to [selectadmin@amyntagroup.com](mailto:selectadmin@amyntagroup.com)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

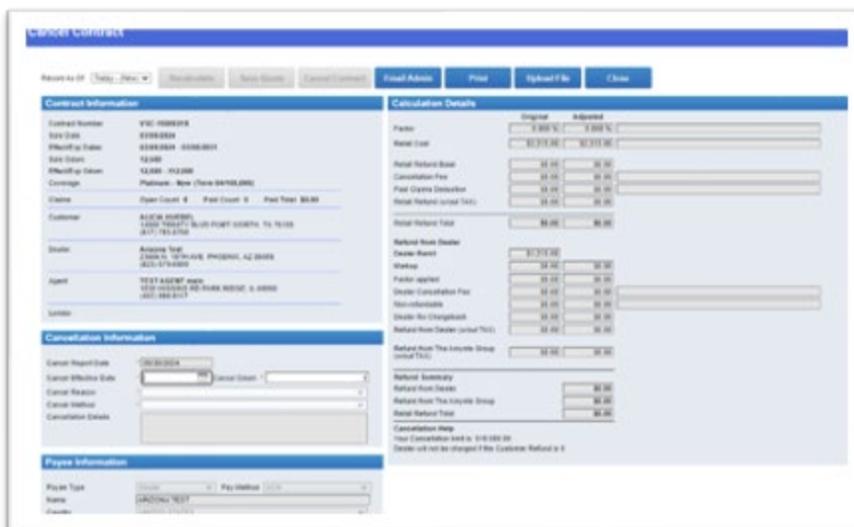
1. Search for the contract you wish to cancel. Select the contract by clicking the **Contract Number** to open in **View Contract** mode.



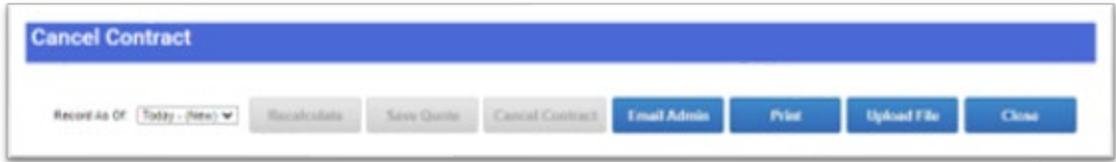
2. From the main contract view, select **Action** then **Cancel** to start the Contract Cancellation Process.



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



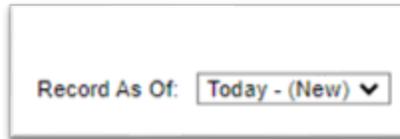
- A. Cancel Screen header bar and options.



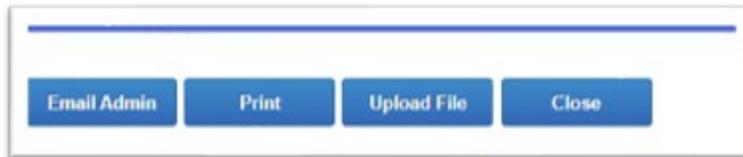
a) Contract warning message(s) will display here, if applicable.



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.

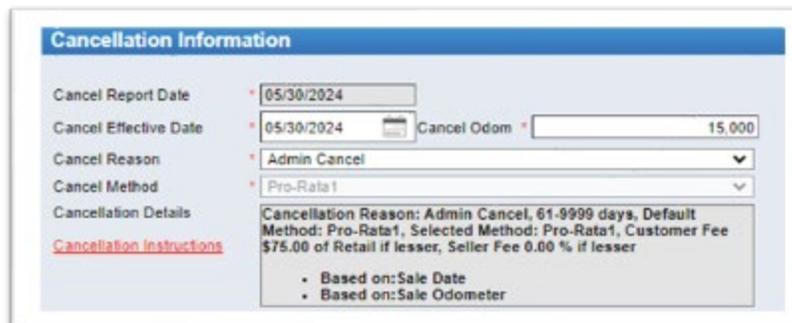


**B. Contract Information:**  
Displays all information on the written contract, including Customer and Dealer Information.



**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.

**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.

Payee Information	
Payee Type	Dealer <input type="text"/> Pay Method <input type="text"/> ACH
Name	ARIZONA TEST
Country	UNITED STATES
Address 1	23606 N. 19TH AVE
Address 2	
Postal Code/State/City	85085 AZ PHOENIX <input type="button" value="Verify"/>

**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.

Calculation Details		
	Original	Adjusted
Factor (Odometer)	97.500 %	97.500 %
Factor (Month - 96.674 %)		
Retail Cost	\$2,213.00	\$2,213.00
Retail Refund Base	\$2,157.68	\$2,157.68
Cancellation Fee	-\$75.00	-\$75.00
Paid Claims Deductible	\$0.00	\$0.00
Retail Refund (w/out TAX)	\$2,082.68	\$2,082.68

**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.

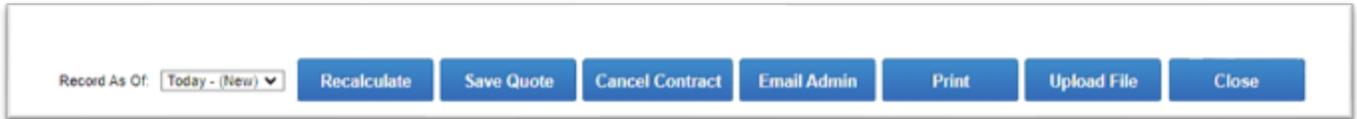
Refund from Dealer		
Dealer Remit	\$1,213.00	
Markup	\$1,000.00	\$1,000.00
Factor applied	\$975.00	\$975.00
Dealer Cancellation Fee	\$0.00	\$0.00
Non-refundable	\$0.00	\$0.00
Dealer No Chargeback	\$0.00	\$0.00
Refund from Dealer (w/out TAX)	\$975.00	\$975.00
Refund from The Amynta Group (w/out TAX)	\$1,107.68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

**G. Refund Summary:**

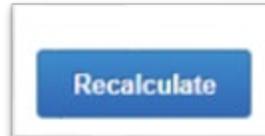
Summary of calculated refund amounts due from TPA and Dealer as well as the Refund Total based on Cancellation Rule applied.

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

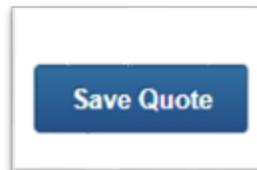
4. Once the required information is entered, your process buttons will become available providing you with various options in the Contract Cancellation process.



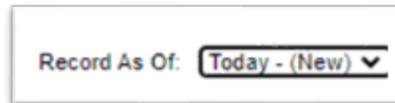
**A. Recalculate:** Select to refresh and display updated calculations when any changes are made to the displayed amounts, cancellation methods, etc.



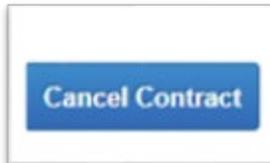
**B. Save Quote:** Allows you to save a cancellation as a "quote" to retrieve later and complete.



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 stop the Contract Cancellation process and return to the Cancel Contract screen.



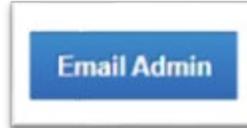
Selecting Yes will immediately cancel the Contract and display the following message in the upper left corner of the contract.



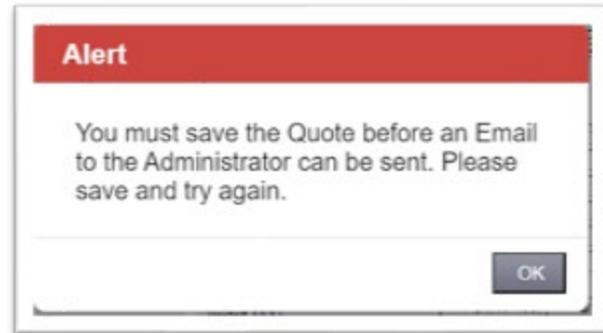


You must have permissions to cancel contracts. Permissions are provided by your system administrator, please check with them to secure the proper permissions.

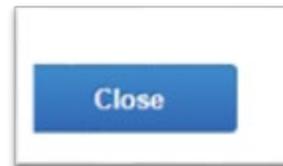
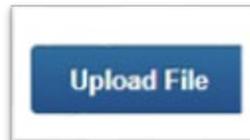
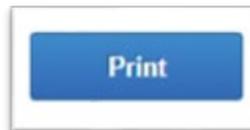
- D. Email Admin: In some cases, permissions may require that you Email the designated cancellation Admin to complete the contract cancellation process. If this is a requirement, the Email Admin will be available (blue).



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**.



- E. Print: Allows you to print the Contract Cancellation form, if cancellation form(s) exists. 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 the cancelled contract before or after cancellation has been completed.
- G. Close: Select Close to exit 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 [selectadmin@amyntagroup.com](mailto:selectadmin@amyntagroup.com) for processing.

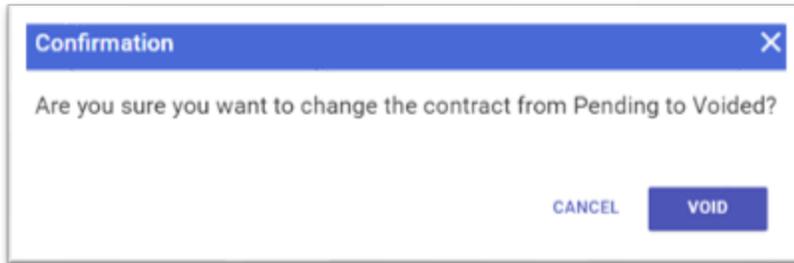
1. Search for the contract you wish to cancel. Select the contract by clicking the **Contract Number** to open in **View Contract** mode.



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



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



4. The contract status will change to **Voided**. Note you will **not** be able to change the status once the contract has been **Voided**.

