



WARRANTY SOLUTIONS®

AN AMYNTA COMPANY

PCRS+ TRAINING GUIDE

Create, Save & Search a Quote

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 the option to Quote and Save a Quote for future issuance.

Guide leads you through the steps necessary to create and save a quote in the Policy Claims and Reporting Solutions (PCRS+) for Warranty Solutions.

This guide will cover:

- Create a Quote
- Save a Quote
- Search a Quote

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.

Create & Save a Quote

If your customer is not ready to complete the vehicle and coverage purchase, you do have the option to save the quote and retrieve it later.

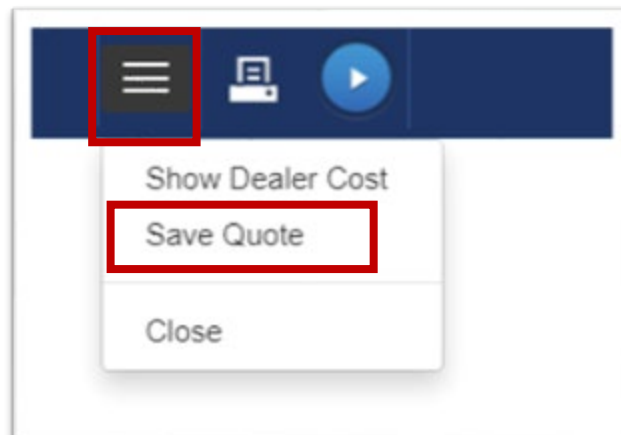
1. Begin the contract creation process via **Add Contract** or **Quick Rater**.

Enter all the required vehicle and financial information; select rated coverage or coverages and add them to the cart.



2. Select the three-bar menu to display the options.

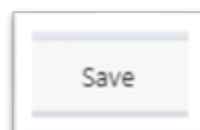
Select the **Save Quote** option to proceed.



3. The Save Quote screen will display. Fill in the following information:

- a. **Deal #** (not required but necessary)
 - b. **Last Name** (required)
- Complete any additional information fields you choose.

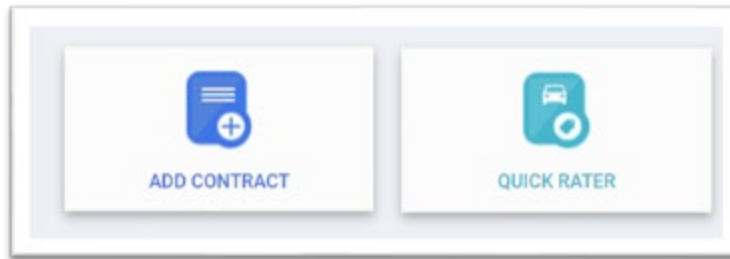
4. Select **Save** when all information has been entered.



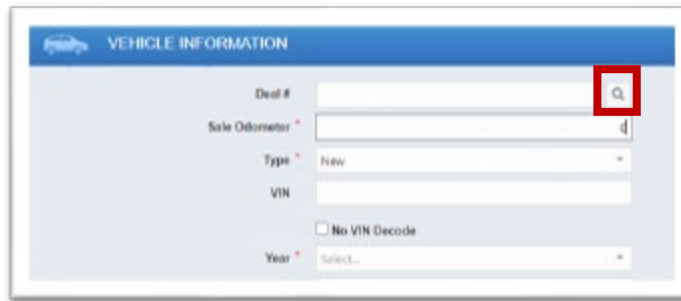
Search a Quote

To retrieve a previous quote, you will need the Deal #.

1. Begin the contract creation process via **Add Contract** or **Quick Rater**.



2. 'Click' the magnifying glass next to **Deal #** to search.



3. Use the filter to search by Deal #, First Name, Last Name or VIN.

Once found, click the Deal # and the contract will populate.

