

# PCRS+ Dealer and Portal Guide

# **PCMI** Corporation

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# **VERSION INFORMATION**

Version	Date	Author	Comment
V2020 1.0	2020-MAR	PCMI Corporation	Initial Release
V2021 2.0	2021-FEB	PCMI Corporation	screen, Functionality and Process Updates
V2021 3.0	2021-JUN	PCMI Corporation	Main Page Graphic Update
V2024 4.0	2024-JUN	PCMI Corporation	Grammatical changes

#### LEGEND

As you navigate through this guide, you will encounter several icons that indicate general, important, and/or critical information. These icons are designed to call attention specificly to the task you are performing within the PCRS+ system. Below is a legend describing the icons you will encounter and their significance.



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



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



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**

This Dealer Guide leads you through the steps necessary to perform Dealer functions in the Policy Claims and Reporting Solutions (PCRS+) for Automotive.

This guide will cover:

- Log into PCRS+
- Add Contract
- Quick Rater
- Search Contract
- Save Quote
- Reporting

This guide highlights basic navigation strategies and tips for effectively using the PCRS+ software and follows the standard workflows and settings. Since the PCRS+ system is configured to meet your Dealer specific needs, you may notice some differences between it and the screen captures used in this guide.

# Using This Guide

The PCRS+ Administrator Guide is designed to be used as a reference and provided by PCMI.

This document is best used as a reference guide and has been optimized for printing and binding. The guide should be duplex printed for optimal presentation. This guide may be printed in black and white.

# LOG INTO PCRS+

# Supported Web Browsers

In order to access PCRS+ for your organization, you will need to log in. A domain has been configured for your organization and contains data specific to your book of business.

To access PCRS+, you will need to use a supported web browser. PCMI supports the following browsers:



Microsoft Edge\* Most Recent Version



Safari Most Recent Version



Google Chrome Most Recent Version



Firefox Most Recent Version

\*PCMI has ended support of Internet Explorer 11 as a supported web browser. PCRS+ applications will still be accessible via IE 11; however, some user interfaces may not function properly.



PCMI strongly suggests upgrading your browser to the most recent version.

# PCRS+ Portal Access

- 1. Open your web browser and enter the specific URL in the address bar.
- Enter the login email and password for the selected URL.



3. Click Login.

URL/Web Address:			
_			
Email:			



Contact your system administrator if you do not have the URL, a user email, and a password to log in.



# Password Recovery

Should you forget your password, PCRS+ provides the option to reset and/or reset your password.

 From the PCRS+ login screen, click the FORGOT PASSWORD link.

Log into your account
Email
Password
Remember my E-mail
Log in
FORGOT PASSWORD?

- 2. The Forgot Your Password screen will display:
  - **A.** Enter your Email.
  - **B.** Select Reset Password.
  - C. If you wish to exit without resetting your password, click BACK TO LOGIN.
- You are prompted to check your Email for instructions to complete the reset of your password.







Based on granted Security Access, some of the options described may not be available to all users.

# PCRS+ Homepage

The PCRS+ home screen provides several new options for streamlined access. These options include:

DEN	<b>IO TPA</b>			B Age	* Dealer	👻 🕕 120 min 🛛 🖪 Randy Price
A	CONTRACTING	CLAIMS ENTITIES	CONFIGURATION ADMINISTRATION	N VIN SEARCH REPORTS		
	G		QUICK RATER	PROCESS REGISTER	ADD CLAIM	DASHBOARD



>

State

abc

KΥ

PA

FL

IL

# Your Technology Partner PCRS+ DEALER PORTAL GUIDE

# **VERSION 4.0**

To build a search, just hover over the search options button for each column and select the parameter(s) you wish to build your search.

To clear search parameters, click **Reset**.

**User Information:** Hover over the username to display the current user information based on security permissions. Menu includes:

- Session Information
- Diagnostic Information
- My Profile
- Logout

All users will have permission to **Logout** from this screen.

Click to launch the **Add Contract** screen and begin the Contract rating process.

#### Be sure to select a Dealer!

Click to launch the **Quick Rater** screen and begin the Contract rating process.

Be sure to select a Dealer!

Click to launch the **Process Register** to remit Contracts, Claims, and Other transactions.





# **PCRS+ DEALER PORTAL GUIDE**

**VERSION 4.0** 

Click to launch the **Start Claim/Redemption** process screen.



DASHBOARD

Click to launch the Sales Dashboard.

# Access Origional PCRS+ Portal

Future enhancements and developments to the PCRS+ Portal are on-going. Until those are complete, it will be necessary, from time to time, to perform functions only available in the original version.

You may easily access the original PCRS+ Portal by selecting the corner of the screen.

Once selected, the original PCRS+ Portal will launch in a separate browser window. You can have both Portals open and functioning if you choose to do so.



The availability to see and click links is based on user-assigned permissions. Please contact your system administraor with questions.

#### NOTES

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# CONTRACTING

# Add Contract

The Add Contract Function allows you to view all eligible products, electronically rate, and create Contracts for vehicles.

- From the PCRS+ Homepage, select a dealer that you wish to add a Contract for.
- Agent Dealer 👻
- 2. Select **ADD CONTRACT** to open the Deal Setup screen and begin adding a Contract.





If the Add Contract screen does not appear, be sure you have 'allow pop-ups from this site' enabled in your browser.

 On the left side of the screen, enter the Vehicle Information. All fields with a red \* are <u>required</u>.

Enter the Year, Make, and Model, as required or entering the VIN, will decode this information and automatically populate the fields.

**Sale Date** is the date of the Contract entry and not the sale date of the vehicle. You do have the opportunity to add a vehicle purchase date later.

Deal #	
Deal #	Q
	Philippine and Philip
Sale Odometer *	d
Type * New	-
VIN	
Year * Select	•
Make * Select	Ť
Model * Select	•
Sale Date * 02/20/2020	
In-Service Date 02/20/2020	
Stock #	

# PCRS+ DEALER PORTAL GUIDE

# **VERSION 4.0**

4. On the right side of the screen, enter the **Vehicle Purchase Price** if required.

If the vehicle is being financed, complete a lender search before proceeding.

eal Setup		
	. INFORMATION	
Finance Type	Select 🝷	
Vehicle Purchase Price \star	\$0.00	]
Amount Financed	\$0.00	
Finance/Lease Term	0	
APR	0.00%	
Payment	\$0.00	
MSRP/NADA	\$0.00	
Lender Search	Q	
Lender Name		

Full financial information is required to return rates for GAP products.

# Lender Search

- 1. Click the lookup icon to begin the **Lender Search**.
- 2. The Lenders screen will open and display the list of lenders in alphabetical order in the **Name** column.
- Type the name of the Lender in the Name Search Field. The field will search and narrow the Lenders as you type.
- If the correct Lender appears in the list, select the lender name, and proceed to Product Selection.

If the Lender does not exist; you will need to continue to **Add Lender** and add the Lender.



enders			×
Q. Search @ Clear filts	ers + Add Lender	X Close	
Name	Address	Oly	State
島: Capi			8
CAPITAL ONE AUTO FINANCE	PO 80X 660068	SACRAMENTO	CA
CAPITOL ONE AUTO FINANCE	123 MAIN STREET	SAN PEDRO	CA

Lenders			×
Q. Search @ Clear filters	+ Add Lender 🗙 Close		
Name	Address	City	State
图: Capi	B-		
CAPITAL ONE AUTO FINANCE	PO 800 660068	SACRAMENTO	CA
CAPITOL ONE AUTO FINANCE	123 MAIN STREET	SAN PEDRO	CA



# Add Lender

- To add a new Lender not yet in the database, click + Add Lender to display the Add Lender screen.
- Lenders
  Q. Search
  O Clear filters
  + Add Lender
  X. Close
- Enter the required Lender Information \* including the Lender Type from the dropdown box.
- 7. When finished, click the **SAVE** button to save and add the Lender.

The Lender will now appear in the Lender Search.



# Product Selection

 After the Vehicle and Financial information has been completely entered, click the right arrow button in the upper right corner of the page to move forward.



2. The **Select Products** page will display the entire list of products for which the Vehicle is qualified. Each section represents the various Coverages, and each box represents the Coverages that the Vehicle is qualified for.

vsc			Appearance Protection			Prepaid Maintenance				
Select	Product	•	Select Product   Select Product				•			
Sei	rvice Guard F	Platinum -	I Ma	ax Protectio	on - Combo	FMM-CONV 3,000				
Au	Authorize		Term	Term 36 Months, \$0.00 Per Re • T			Term	24/30,000		Ŧ
Term	3/3,000, \$10	0.00 Per Re 🔻		Class: *	Vehicle: *			Class: 7	Vehicle	*
	Class: *	Vehicle: N					🗹 Lu	be Oil & Filte	ər	\$0.00
🗹 Co	il	\$0.00			\$0	0.00	🗹 Tir	e Balance ar	nd	\$0.00
🔲 Co	mmercial Us	e					Ro	otation		
	_	\$0.00				_		_		\$0.00



If there are no product results displayed, this may indicate the Vehicle is ineligible.



3. Click the product Coverage checkbox.

A selection of associated terms to choose from will be displayed in the drop-down.

4. Select to choose the desired term from the drop-down.

Appearance Protection								
Select Product -								
Max Protection - Combo								
Term	i Months, \$0.00 Per Repair 💌							
	36 Months, \$0.00 Per Repair							
	48 Months, \$0.00 Per Repair							
	60 Months, \$0.00 Per Repair							
_	\$155.00							

# **Product Pricing**

 The Coverage price(s) selected are displayed on the right side of the Select Products screen.

The total (sum) of all Coverages selected displays at the bottom of the Selected Products screen.

If enabled, you may click the '*i*' to view <u>Product Price Summary</u>.



2. You can view the Retail Price or Dealer Cost by clicking on the three horizontal lines (hamburger menu).





# Partner PCRS+ DEALER PORTAL GUIDE

# **VERSION 4.0**

 From the menu, you can switch between viewing Cost or Retail by selecting the Show Dealer Cost or Show Retail view.

 When the Show Retail view is selected, the pricing box below the Cost Header will open for editing the retail price of the Coverage being charged to the Customer.

When the **Show Dealer Cost** view is selected, the pricing box will display the dealer cost of the Coverage *and* will be 'grayed out' from editing.

- 5. To print a quote of the selected Coverage(s), click the Print icon in the upper right corner.
- To proceed to the Customer Information screen, click the right arrow button in the upper right corner of the page to move forward.

# **Customer Information**

 Enter the required \* Customer information for all fields on the Customer Information screen. Vehicle and Financial information are carried forward from the previous screen.



Selected Products

\$900.00

Service Guard

Platinum - Authorize





Е

# PCRS+ DEALER PORTAL GUIDE

# **VERSION 4.0**

	NFORMATION		DRMATION		FORMATION
	Personal Business	Deal #		Finance Type	Any
First Name *		Sale Odometer	150	Vehicle Purchase Price	\$25,000.00
Last Name *		Туре	N	Amount Financed	\$0.00
Alt. Name		VIN	1G1YT2D63H5600104	Finance/Lease Term	0
Address 1 *		Year	2017	ADD	0%
Address 2		Make	CHEVROLET	Deserved	en on
Zip Code *	State *	Medal	CORVETTE 706	Payment	\$0.00
City *	verify	Model	CORVETTE 206	MSRP/NADA	\$0.00
Country *	United States 👻	Sale Date	02/24/2020	Lender Name	
Language	English · United States *	In-Service Date	02/24/2020	F&I Manager/Seller	Select
Primary Phone	ext #	Stock #			
Secondary Phone	( ext≠	Vehicle Sale Date			RMATION
Email Account					
				Payment Method * Sel	ect •
	RODUCTS				
Contract # **	Ref #		Description		Retail
	Service Guard Pla	atinum - Authorize			\$900.00
					\$900.00



All fields with the **red** \* indicate required information must be entered before proceeding.

2. Prior to submitting the Contract, you may edit the Retail Price of the Coverage(s), if desired.

SELECTED PRO	DUCTS		
Contract #	Ref #	Description	Retail
		Service Guard Platinum - Authorize	\$900.00
			\$900.00

 'Click" the Printer icon to preview a sample of the Contract prior to submission.





Once the Contract has been submitted, changes or corrections may not be made. It is *strongly* advised that you preview all Contracts prior to submitting them.

4. Click the Right Arrow button in the upper right corner to submit the Contract.



# eSignature

5. On successful submission of the Contract, the **eSignature Confirmation** box will appear. This will allow your Customer, if they choose, to sign the Contract with eSignature.

If your Customer chooses to use the eSignature option, they must click the I Agree checkbox *and* Click the Accept button.



6. The signature screen is displayed with the Customer Signature box at the top and the Contract below. The Customer may sign within the Customer Signature Box using the mouse.



7. Once your Customer has signed, the **Done** button will activate. Click the **Done** button to accept the eSignature.



8. Click the Printer icon in the upper right corner of the Contract page to print with eSignature.



If your Customer declines eSignature, an additional tab will open displaying the completed unsigned Contract. Use the Printer icon to print the unsigned Contract. Print 3 copies for your Customer to sign:

- Customer Copy
- Dealer Copy
- Remittance Copy
- 9. After all copies of the Contract have been printed, exit out of the Contract tab.
- 10. If you have additional Contracts to enter, Click the **New Contract** button.
- 11. If you have no additional Contracts to add, Click the **Close** button.

New Contra	ct
Close	

#### NOTES





# **QUICK RATER**

The Quick Rater function of the Dealer Portal allows you to electronically rate a Coverage using only the vehicle details (Odometer, Type, Year, Make, Model, Sale Date). When the vehicle details are populated, the VIN is not required to rate a Contract. You may use the VIN in place of the vehicle details, but it is not required to receive a rating.

# **Open Quick Rater**

1. Click to expand the **ACTION** side menu bar and scroll to the **CONTRACT** section.



2. Click the **Quick Rater** link to begin rating a Contract.

3. The Quick Rater screen will display the Vehicle Information tab. Enter the required vehicle information in the fields with a **red** \*.

Quick Rater			
VEHICLE	Deal #	٩	
	Sale Odometer *	C	)
<u><u>m</u></u>	Туре *	New -	
FINANCIAL	VIN		
	Year *	Select	
Con la constante	Make *	Select	
RATES	Model *	Select	
	Sale Date *	02/25/2020	1
	In-Service Date	02/25/2020	1
		Financial Show Rates	
	<ul> <li>identifies required information</li> </ul>		

4. Click the Financial tab and enter the required information \* on the Financial Information screen.



-		
VEHICLE	Finance Type	Select
	Vehicle Purchase Price *	\$0.00
π	Amount Financed	\$0.00
INANCIAL	Finance/Lease Term	0
	APR	0.00%
G	Payment	\$0.00
RATES	MSRP/NADA	\$0.00
	Lender Search	Q
	Lender Name	

5. Click **Show Rates** after the Vehicle and Financial information has been entered to display rates for eligible Coverages.



6. Quick Rater will display the eligible Coverages for the vehicle grouped by product.

Quick Rater				= 💿
VEHICLE	2019 MINI Sale Odor	Convertible Cooper S WMWWG9C59K3J30911 neter 150 Sale Date 02/25/2020	Product Type All	· <u> </u>
	5	Bronze Luxury		<u>₽</u> ×
	ASC.	Gold		Selected Products
	Ę.	PermaPlate Tire & Wheel		Product Cost
RATES				
				0.00
				Continue

 If the cart is obstructing the Coverage drop-down arrows; you may 'collapse' the cart using the arrows in the upper right corner.



To restore the cart, simply Click the cart icon in the lower right corner of your screen.

- [ **א**
- 8. Click the drop-down arrow to the right of the Coverage to view individual Coverage rates or Click the uppermost arrow to expand all Coverage rates.

The print icon next to each drop-down arrow will allow you to print a summary of each Coverage for a quote.

2019 MIN Sale Odo	I Convertible Cooper S WMWWG9C59K3J30911 meter 150 Sale Date 02/25/2020	Product Type	All	•	≞~
ر <u>۷</u>	Bronze Luxury				₽₽
VSC	Gold				₽~
μ	PermaPlate Tire & Wheel				≞ ~

9. Hovering over a Coverage with the mouse will display the + symbol. Click the + to preview a pop-up of the Coverage rate.

2019 MIN Sale Odo	II Convertible Cooper S WMWWG9C59K3 meter 150 Sale Date 02/25/2020	J30911	Product Type	All	•	≞.∨
	Bronze Luxury					≞^
	Deductibles	\$0.00 Per Repair	:	\$100.00 Per Repair		
ż	12/12,000	\$379.00		\$279.00		Ð
vsc	24/24,000	\$669.00		\$569.00		
	36/36,000	\$778.00		\$678.00		

10. The pop-up will display the Coverage type, term, deductible, and Coverage cost.

Additional add-on options are selectable by selecting the checkbox next to the option. The specified add-on cost will be added to the Coverage cost.

Bronze Luxury 12/12,000, \$100.00 Per Repair	\$279.00	
Additional Paid Options:		
Commercial Use	\$150.00	•
Diesel Engine	\$75.00	
Emergency Roadside Assistance		
Rental Car Reimbursement		۰.
V Tire Repair		•
	Add to Selected Clos	se

- 11. Click **Add to Selected** to select the Coverage and move to your cart.
- 12. Click **Close** to close the details pop-up and view/select another Coverage.



# 13. Continue until all Coverage(s) have been selected and added to the cart.

- 14. If minimized, Click the cart icon at the bottom of the screen to open the cart.
- 15. Your cart will display the selected Coverage(s) and the price per each as a line item.

The total for all Coverage(s) selected is displayed at the bottom of the cart screen.

- 16. If you wish to remove a Coverage, click the trash can to remove from your cart.
- 17. Click Continue, to continue with the selected Coverage(s) and finish entering the customer details.



Product

18. Complete the Contract entry process by adding the remaining information.



19. Click the Right Arrow button in the upper right corner to submit the Contract.



Continue

Selected Products

Cost

\$279.00

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#### NOTES

# QUOTES

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.

# Create and Save a Quote

 Begin the Contract creation process via Add Contract or Quick Rater.

Enter all the vehicle and financial information required; select a rated Coverage or Coverages, and add them to the cart.



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





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



- 4. The **Save Quote** screen will display. Fill in the following information:
- 5. **Deal #** (not required but recommended).
- Last Name (required).
   Complete any additional information fields you choose.

Save Quote		×
Deal # First Name Last Name * Comment		
	Cancel Save	



Deal # is not a required field, but recommended to allow you to search for the saved quote!

7. Click **Save** when all information has been entered.



#### NOTES



# **SEARCH CONTRACT**

# **Open Search Contract**

PCRS+ provides visibility to your completed/existing Contracts. Contracts are available to search and view regardless of the Contract status.

1. From the PCRS+ Homepage, click **Contracting**, then **Contracts**.



2. The **Search Contract** main screen provides a view of Contracts within the PCRS+ system. Several new options exist to allow you to filter and display Contracts specific to your viewing requirements.

Sear	rch Contract									
Select an	Agent Agent	elect a Dealer	· .	ALL	8 -	B			E CLEAR ALL FILTERS C	CHOOSE COLUMNS
Status	D Contract Number	Coverage	Entry Date	Deal Number	Sale Date $\downarrow$	First Name	Last Name	City	State	
(All)	▼ BEc	ab <sub>c</sub>		abc		<u>ab</u> c	<u>ap</u> c	<u>ab</u> c	<u>ab</u> c	

# Search Contract Filter Options

 Select an Agent / Select a Dealer: You can now search and select an Agent or Dealer from the main Contract screen.

All search criteria available for selecting an **Agent/Dealer** in the Contract Header screen are available on this screen. Number Name City State abc abc abc abc A100 Dealer Support A., RICHMOND KY A200 Automotive Con PITTSBURGH PA A300 Advanced Vehicl... TAMPA FL A400 F&I Consulting ORLAND PARK IL

Click on the **1** named fields to sort the column in chronological order.

Number ↑	Name	City	State

If you select an **Agent/Dealer** in the **Contract Header**, it will auto-populate the corresponding field on the **Search Contract** main screen.

# hnology Partner PCRS+ DEALER PORTAL GUIDE

 Filter your view by Coverage Type. Select your option from the drop-down menu.

ALL	×
ALL	
VSC	
GAP	
Appearance Protection	
Prepaid Maintenance	
Key Replacement	

=

CLEAR ALL

FILTERS

APPLY

FILTERS

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 The following filter options are available to allow you to customize your view based on desired filters applied to the Search Contract screen.

**APPLY FILTERS:** Click after all desired filters have been created. This will apply your filtered view to the **Search Contract** screen.

**CLEAR ALL FILTERS:** Click to remove <u>*all*</u> filter selections from the **Search Contract** screen.

CHOOSE COLUMNS: Allows you to choose columns to add/remove on the Search Contract screen.



白

CHOOSE

COLUMNS





6. New interactive filter options have been added to PCRS+, allowing you to create a more detailed view, filtered to your needs.



▼ Drop-down options click the arrow to see choices available to filter by.



#### **VERSION 4.0**

abc Text Filter: Provides the ability to filter by text filters or simply type free-form text directly into the search field.

Use the **Reset** option to clear search criteria.

Range Filter: Provides filter options to allow search criteria based on a range including dates.

Clicking in the search field provides a calendar with selectable dates. Use the **Reset** option to clear search criteria. Ascending/Descending column sort available when the arrow exists to the right of the column name.

 When all filters have been selected/created as desired, click APPLY FILTERS to apply data filters.



# APPLY FILTERS

# **Custom Column View**

With the enhanced screen functionality, PCRS+ now provides the option to customize the columns view based on your **user login**. Users can move or rearrange columns. Simply left click on your mouse to drag and drop the column to the desired location.

 To customize the location or arrangement of the columns on the Search Contract screen, simply left click on your mouse to drag the column to the desired location on the screen.

FC	RCE				Se	lect an Agent	▼ RP12	3456 - Randys Au	ito 🐵 🕶	Randy	Price
<b>f</b>	CONTRACTING	CLAIMS	ENTITIES AL	DMINISTRATION	REPORTS						
Se	earch Contra	ct									
Select	an Agent	-	RP123456 - Rand	dys Auto Cente	Select a Produc	ct Type	· ·		APPLY	E CLEAR ALL FILTERS	CHOOSE COLUMNS
Status	Contr	act Number	Coverage	Entry Date	Deal Number	Sale Date $\downarrow$	First Name	Last Name	City	Stat	e
(All)	▼ <u>ab</u> c		abc	-	abc		abc	abc	abc	abc	

2. Release the mouse to place the selected column in the new location on the screen.



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FO	RCE				Sel	ect an Agent	▼ RP12	23456 - Randys A	uto 🕲 🔻	Randy	y Price
<b>f</b>	CONTRACTING	CLAIMS	ENTITIES AD	MINISTRATION	REPORTS						
Sea	arch Contra	ct									
Select a	an Agent	-	RP123456 - Randy	rs Auto Center	Select a Product	t Type	<b>•</b>			E CLEAR ALL FILTERS	
Status	Contr	act Number	Coverage	Deal Number	Sale Date ↓	Entry Date	First Name	Last Name	City	Stat	te
(AII)	▼ ab		abc	abc			abc	abc	abc	abc	

# Add or Remove Columns

view.

screen.

Users are now able to choose which columns you would or would not like to view. Columns can be added or removed quickly from view using the **Choose Columns** option.

1. Click the Choose Columns button.

2. Use the **Choose Columns** option to add or remove columns you wish to see in your

Select the column from the list in the

Column Chooser or use the search field to



find the desired column by name.
3. To add a column to your view left click and drag to the desired location. To remove the column from the view, simply left click and drag the column you want to remove to the **Column Chooser** box at the bottom right corner of the

FO	20	E			Sel	ect an Agent	▼ RP13	23456 - Randys Ai	uto © ▼	Randy	Price
<b>h</b> 0	ONTRAC	TING CLAIMS	ENTITIES ADM	MINISTRATION	REPORTS						
Sear	ch C	ontract									
Select an A	lgent	Ŧ	RP123456 - Randy	s Auto Center	Select a Product	t Type	*			CLEAR ALL FILTERS	CHOOSE COLUMN
tatus		Contract Number	Coverage	Deal Number	Sale Date $\downarrow$	Entry Date	First Name	Last Name	City	State	•
All)	*	abc	abc	abc			abc	abc	abc	aBc	
								Column	Chooser	×	
								Q Search			
			Plea	ise use search cr	riteria above to f	find desired re		VIN			
								Register Nu	mber		

4. Columns that are added or removed from views are specific to your login profile. When you log back in your screen view remain exactly as you left it when you logged out.



Not all columns are available to re-arrange, add, or remove. In most instances, the first two left-side columns may be static and cannot be changed.

# Search Contract View

The **Search Contract** view provides you an overview of Contracts based on the filter criteria you entered.

1. Select the Dealer/Agent and create your desired filters. Click **APPLY FILTERS** to display Contracts.



2. The Search Contract screen will populate based on the filters applied.

FORC	E				Select an Age	ent	▼ D2345 - Bitterroo	ot Motors (	9 <del>-</del>	Rand	dy Price
CONTRAC	CTING CLAIMS	ENTITIES ADMINISTRATION F	REPORTS								
Search C	Contract										
Select an Agent	-	D2345 - Bitterroot Motors	VSC		× •					CLEAR ALL FILTERS	CHOOSE COLUMNS
Status	Contract Number	Coverage	Deal Number	Sale Date $\downarrow$	Entry Date	First Name	Last Name	City		St	tate
(All) 👻	abc	abc	abc	> 1/1/202		abc	abc	abc		abo	
PENDING-NOT- FUNDED	VSC10113702	Service Guard Gold		4/7/2020	4/7/2020	MARK	NAGELVOORT	PARK RI	DGE	IL.	
PENDING-NOT- FUNDED	VSC10113501	Service Guard Platinum - Authoriz	e	4/3/2020	4/3/2020	MARK	NAGELVOORT	PARK RI	DGE	IL	
PENDING-NOT- FUNDED	T VSC10112647	Service Guard Platinum II		3/20/2020	3/20/2020	MARK	NAGELVOORT	PARK RI	DGE	IL	
PENDING- FUNDED	T VSC10111908	Service Guard Platinum (e-Sign)		3/13/2020	3/13/2020	MARK	NAGELVOOR	PARK RI	DGE	IL	
ACTIVE	T VSC10111440	Service Guard Gold		3/10/2020	3/10/2020	VICKI	RONKOWSKI	LOCKPO	RT	IL	
ACTIVE	T VSC10111442	Service Guard Silver (e-Sign)		3/10/2020	3/10/2020	JOE	BLACK	PARK RI	DGE	IL	
ACTIVE	(†) VSC10111444	Service Guard Gold Plus		3/10/2020	3/10/2020	LANA	KOFRON	PARK RI	OGE	IL	
PENDING- FUNDED	T VSC10111318	Service Guard Platinum II		3/9/2020	3/9/2020	MARK	NAGELVOOER	PARK RI	OGE	IL	
PENDING- FUNDED	↓ VSC10109374	Service Guard Platinum - Authoriz	e	2/26/2020	2/26/2020	MARK	NAGELVOORT	PARK RI	DGE	IL	

3. To view a displayed Contract, click the **Contract Number** to view.

You may also type or copy/paste an existing Contract number in the **Contract Number** search field or apply the available abc search filters.





4. View indicator icons have been added to PCRS+. These indicators determine how the link you choose will be displayed on-screen.





Indicates that the selected link will open in the current browser window.

Indicates that the selected link will open in a separate browser window.

To have the links with the ricon open in a separate browser window, use the + ricon because the the ricon open in a separate browser window.

5. Once the desired link is clicked, the Main Contract screen will display.

E						Select an Agent	* D2345 - Bitterroot Motors @ *
TING CLAIMS ENTITIES AD	MINISTRATION REPORTS						
	DEALER 02343- Bitwinet Motors						8" (
	General				Vehicle Information		
	Contract Number * Tatle VSC10111440	ana Dari A	Desch.#	84mm \$0.00	WAUKGAFL6EA079653	Venice Apr Ton * New	
	03/10/2020 03/	10/2020 03/10/202	0 03/10/2023	03/10/2020	Vise 7 Male 7	Wood *	
	Sale Converse 5,000	Difective Odome 0	er Dispitation Odorneser 50,000		Timper Installed Date	54 5.01 quatro Presoge	
	Brand Information					7	
	CUSTOMER CO-BUYER						
	VICKI	RONKOWSKI	Primary Phone	Decordary Proce	linal		
	321 CLOVER RIDGE DR	Address 2	Coursy United States	Sp Code times 60441 L	LOCKPORT	English - United States	
	Coverage Information			Financial Information			
	Coverge SG-N-GOLD - Service Guard G	old	Rame Book	France Type Select	Vehicle Furthese Price \$0.00	Amount Financiad \$0.00	
	1em 36/50,000 \$0.00 Per Repair	6	Tier 1	S0.00	Monthly	S0.00	
	INS2 - Virginia Surety			Balance Interact \$0.00	First Paperset Date	Total Paymente \$0.00	
	S1,500.00 +	\$1,300.00 = \$2	ail Coat 800.00	7mm 0		Account Number	
				· · ·			
	Notes					= + C	
	Autor Mak Napiloot Size Type In Claim 0L10218114 has been create	formation Diversed on 04(07/2020 10:49:34.)	M			/	
	Claim CL10211469 has been create	n Created on 82(17)2020 08:37/05 AM				/	
	Process Register ran, register #R20	Isensation Created on 00110/2020 11:06:02 A 200310-10952112, Payee Force for \$3,05	M 0.00.			/	
	Author: Mark Negelinost Note Type Im Contract created, Coverage: Service	Remailion Division of 0110/2020 11:32:59 J e Guard Gold, Term: 35/50000, Net: 91,50	M 0.00			/	
	Claims					+ C	
	Status Claim#	80.4	Service Odom Services	RO Date Correc	ion Activity	Total Pending Total Paid	
	PENDING CL10	211469 r1234	25,000 Coll Independe		e Compre., Requires Authorizatic	\$411.00 -	

6. The **Contract Header** displays information and options available for the selected Contract.





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# PCRS+ DEALER PORTAL GUIDE

# 7. Main Contract View: The Main Contract View screen provides the ability to view and edit the selected Contract in a segmented view.

General A					1	Vehicle Information		
Contract Number * /SC10111440	Reference 99875-CV	6549785	Stock # MCONV-9	98 \$0.00		WAUKGAFL6EA079653	Vehicle Age Type * New	
ale Date 13/10/2020	In-Genilos Date 03/10/2020	Offective Date 03/10/2020	Displation Data 03/10/20	23 Difed Date	020	тик* Male* 2014 АПЛ	Model * S4.3 0T quattro Prestig	-
ale Odomenar 6,000		Diffective Odometer 0	Expiration Odu 50,000	meer		Nirogen Installed Color		
luyer Information	C							
ist Name IICKI	RONKOWSKI	Prin	ary Phone	Secondary Phone		Enal		
idens 1 21 CLOVER RIDGE DR	Address 2	Cov Un	ited States	2ip Code 60441	Date IL	LOCKPORT	Language English - United States	
overage Information	D			Financial	Information			
G-N-GOLD - Service Gu	ard Gold		Rate Book	Finance Type Select		Vehicle Purchase Price \$0.00	So.oo	
 5/50,000 \$0.00 Per Rej	pair	Ciess 6	Ter TIER1	MSRPINADA \$0.00		Payment Perspectory Monthly	S0.00	
ware Company 4S2 - Virginia Surety				Salton Amoun \$0.00		First Payment Date	Total Payments: \$0.00	
Dealer Cost	FM Markup	Ratal Cost		Term O		4PR 0%	Account Number	
\$1,500.00	+ \$1,300.00	\$2,800.00		Lender +				
athor. Mar Boort Note?	ype Information Created on 04	/07/2020 10:49:34 AM						
aim CL10216114 has been other: System Note Type: Info	created mation Created on 03/17/2021	08:37:05 AM						
arm CL10211469 has been whor. Mark Nagelwoort Note 1	created ype Information Created on 03	/10/2020 11:36:52 AM						
rocess Register ran, register uthor: Mark Nagelvoort Note 7	#R20200310-10952112, Pay ype: Information Created on 02	ee Force for \$3,050.00 . /10/2020 11:32:59 AM						
iontract created, Coverage: 1	iervice Guard Gold', Term: 36	50000, Net: \$1,500.00						_
laims G							+	÷
PENCING Claim	* CL10211469	R0 # Ser	rice Odom Service 25.000 Coll. In	es R0 Date ndependen	Correction Replace C	Activity omoreRequires Authorizatic	Total Pending To \$411.00	otal
	CL 10216114	545434	30,000 Coll	04/07/2020	Replace C	ompre. Payment issued	- 5	\$321
PAD 2								

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A. General: Provides the main details of the Contract being viewed. Edits can be performed by section, simply click the sto open the section for edits.

General				1
Contract Number * VSC10111440	Reference 99875-CV	Deal # 6549785	Stock # MCONV-98	Balance \$0.00
Sale Date 03/10/2020	In-Service Date 03/10/2020	Effective Date 03/10/2020	Expiration Date 03/10/2023	Billed Date 03/10/2020
Sale Odometer 5,000		Effective Odometer 0	Expiration Odometer 50,000	

B. Vehicle Information: Provides the Vehicle information decoded from the related VIN. Edits can be performed by section. Click the sto open the section for edits.

	Vehicle Age Type *
SY14977	New
Make * BMW	Model * X1 M35I XDRIVE
Color	
	Make * BMW Color

**C. Buyer Information:** Displays the Buyer and Co-Buyer information. Toggle between Buyer and Co-Buyer by clicking the **CUSTOMER** of **CO-BUYER** link view. The current view will be displayed in **BLUE** text.

Buyer Information						
CUSTOMER CO-BUYER						
First Name VICKI	Last Name RONKOWSKI	Primary Phone	Secondary Phone		Email	
Address 1 321 CLOVER RIDGE DR	Address 2	Country United States	Zip Code 60441	State IL	LOCKPORT	Language English - United States

Edits can be performed by section. Click the constant of the section for edits.

- D. Coverage Information: Provides various details of the specific Contracted Coverage including highlevel pricing.
- E. Financial Information: Displays all Financial Information entered (and not entered) during the Contract creation process. Edits can be performed by section. Click the sto open the section for edits.



F. Notes: An interactive notes field is now displayed on the Main Contract View allowing you to preview note details as well as perform various additional functions.

Notes	≡ + C
Author: Mark Nagelvoort Note Type: Information Created on 04/07/2020 10:49:34 AM	
Claim CL10216114 has been created	
Author: System Note Type: Information Created on 03/17/2020 08:37:05 AM	
Claim CL10211469 has been created	
Author: Mark Nagelvoort Note Type: Information Created on 03/10/2020 11:36-52 AM	
Process Register ran, register #R20200310-10952112, Payee Force for \$3,050.00.	
Author: Mark Nagelvoort Note Type: Information Created on 03/10/2020 11:32:59 AM	
Contract created, Coverage: Service Guard Gold, Term: 36/50000, Net: \$1,500.00	

Edit/View Existing Note(s): Click the icon to view or edit an existing Note line.

The ability to edit notes is controlled by User Permissions.



View Notes: View and Search for all notes associated with the current VIN by selecting the Menu Button. Search and Filter by Contract, Claim, Product Type. Sort display in chronological order by Entered Time.

VIN - WAUKG	AFL6EA079653	Ξ,				=	
	Class III Calds						
Reffesh	Clear All Helds						
CONTRACT#	CLAIM #	PRODUCT TYPE	NOTE TYPE	NOTE	ENTERED TIME	ENTERED BY	
		*	-				
VSC10111444	CL10213853	VSC	Information	Authorization Changed: C&K AUTO PARTS - Total Authorized \$341.25 - Last Auth # 129255.	04/08/2020 08:17:22 AM	Mark Nagelvoort	^
VSC10111444	CL10213853	VSC	Information	Authorization Changed: Bitterroot Motors - Total Authorized \$201.81 - Last Auth # 129254.	04/08/2020 08:17:22 AM	Mark Nagelvoort	
VSC10111444	CL10213853	VSC	Information	Claim status changed from Pending to Authorized.	04/08/2020 08:17:22 AM	Mark Nagelvoort	
VSC10111444	CL10213853	VSC	Information	Part E33 ordered from C&K AUTO PARTS was deleted	04/08/2020 08:12:52 AM	Mark Nagelvoort	
VSC10111444	CL10213853	VSC	Information	Part E33 ordered from C&K AUTO PARTS was deleted	04/08/2020 08:11:28 AM	Mark Nagelvoort	
VSC10111440	CL10216114	VSC	Information	Claim status changed to Paid.	04/07/2020 11:19:37 AM	System	
VSC10111440	CL10216114	VSC	Information	Claim status changed from Authorized to Approved.	04/07/2020 11:12:28 AM	Mark Nagelvoort	
VSC10111440	CL10216114	VSC	Information	Authorization Changed: Bitterroot Motors - Total Authorized \$321.00 - Last Auth # 129017.	04/07/2020 10:57:50 AM	Mark Nagelvoort	
VSC10111440	CL10216114	VSC	Information	Claim status changed from Pending to Authorized.	04/07/2020 10:57:50 AM	Mark Nagelvoort	
VSC10111440	CL10216114	VSC	Information	New Claim Created. Loss Odometer: 30,000, Loss Date: 04/07/2020	04/07/2020 10:49:34 AM	Mark Nagelvoort	

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Add Note/Claim Alert: Add a new Note/Claim Alert by clicking the + button. Enter the desired Note or set the desired Claim Alert; click ADD NOTE to save and close.

Clein Aler Select	v		
		CLOSE	ADD NOTE
			CLOSE

**Refresh Notes View**: You can refresh the notes preview window at any time by clicking the **Refresh** button.



**G.** Claims History: Claims history is now available to view on the Contract View screen, when the General view is selected. View the status and details of current or past Claims associated with this Contract.

Claims									+ C
Status	Claim #	R0 #	Service Odom	Services	RO Date	Correction	Activity	Total Pending	Total Paid
PENDING	CL10211469	r1234	25,000	Coil, Indep	03/17/2020	Replace C	Requires Authc	\$411.00	
PAID	CL10216114	545434	30,000	Coil	04/07/2020	Replace C	Payment Issue	-	\$321.00
							Summary:	\$411.00	\$321.00

**Claim #:** To view the details of a displayed Claim, click the **Claim Number** link. The **Claim screen** will open in a new browser tab.



Add Claim: Add/Start a new Claim by clicking the 🕂 button.

The **Add New Claim** screen will open in a new browser tab.



**Refresh Claims History**: You can refresh the Claims History preview window at any time by selecting the **Refresh** button.



8. Coverage & Rates View: The Coverage & Rates View screen provides the ability to view additional information that is not displayed as part of the Main View.

In addition to displaying General, Vehicle, Buyer, Coverage, and Financial Information; this view includes Options/Surcharges and Rates Details.

 To view Coverage and Rates on the selected Contract, click the Coverage & Rates link on the Contract view screen.



The current view will be displayed in **BLUE** text.

- 10. The screen will refresh and display the **Coverage & Rates** view. As we reviewed the upper screens in item #7, we will review only the additional sections displayed in the **Coverage & Rates** view.
- 11. Options/Surcharges: All Options and Surcharges that are part of the Coverage display including the associated cost. Those Options and Surcharges added/sold as part of the Coverage show the indicator in the Use field.

Options/Surci	Options/Surcharges							
Use	Name	Description	Cost					
	Conditional Benefit - Engine Type	Conditional Benefit - Engine Type	\$0.00					
Image: A start of the start	Fuel Tank	Fuel Tank	\$0.00					
Image: A start of the start	Commercial Use	Commercial Use	\$100.00					
Image: A start of the start	Lift Kit	Lift Kit	\$100.00					
Image: A start of the start	4WD/AWD	4WD/AWD	\$150.00					
Image: A start of the start	ALL Wheel Drive	ALL Wheel Drive	\$0.00					
	Diesel	Diesel	\$0.00					
	Technology Package	Technology Package	\$0.00					
	Transmission	Transmission	\$0.00					
Image: A start of the start	Turbocharger	Turbocharger	\$150.00					

12. **Rates Details:** View the detailed Written, Cancelled, and Balance(s) of the Contract Transaction.

Rates Detai	ils					
ADMIN						
Code		Description	Rate Type	Written	Cancelled	Balance
BASEADM	lin	Base Admin	Net Rate	\$95.00	\$0.00	\$95.00
MARKETI	NGFEE	Marketing Fee	Net Rate	\$5.00	\$0.00	\$5.00
NCBFEE		Dealer NCB Fee	Net Rate	\$5.00	\$0.00	\$5.00
AGENT NO	CB	Agent NCB	Net Rate	\$17.50	\$0.00	\$17.50
			Summary:	\$122.50	\$0.00	\$122.50
RESERVE	S AND FEES					
Code		Description	Rate Type	Written	Cancelled	Balance
BASERES	ERVE	Base Reserve	Net Rate	\$440.00	\$0.00	\$440.00
SURCHAR	GE	Surcharge Reserve	Net Rate	\$690.00	\$0.00	\$690.00
CLIP		CLIP	Net Rate	\$65.00	\$0.00	\$65.00
PREMIUM	TAX	Premium Tax	Net Rate	\$2.50	\$0.00	\$2.50
			Summary:	\$1,197.50	\$0.00	\$1,197.50
COMMIS	SION					
Code		Description	Rate Type	Written	Cancelled	Balance
AGENTCO	MM	Agent Commission	Net Rate	\$140.00	\$0.00	\$140.00
DISCOUN	г	Discount	Net Rate	\$20.00	\$0.00	\$20.00
DEALERCO	MMC	Dealer Commission	Net Rate	\$20.00	\$0.00	\$20.00
DLROVER	REMIT	Dealer Overremit	Over Remit	\$0.00	\$0.00	\$0.00
SUBAGEN	т	Agent Commission II	Net Rate	\$0.00	\$0.00	\$0.00
			Summary:	\$180.00	\$0.00	\$180.00
τοτοι						
TOTAL	Data	Description		Mainten	Concelled	Palanas
	Not Poto	Admin + Reserves + Commit	reion	\$1 500.00	so oo	\$1.500.00
-	Ourse Descrit	Aumin + Reserves + Commis	131011	01,000.00	30.00	01,000.00
	Over Remit	Constant States and States		\$0.00	\$0.00	\$0.00
-	Coloulated Dr	Sum of remittance fields		\$1,500.00	\$0.00	\$1,500.00
_	Dealer Cost	Dealer Remit + Dealer Pack		\$1,500,00	\$0.00	\$1,500,00
+	F&I Markup	Dealer Nerrik + Dealer Fack		\$1,300.00	\$0.00	\$1,300.00
=	Retail	Dealer Cost + E&I Markup		\$2,800,00	\$0.00	\$2,800,00
	Iverall	Dealer Cost + Pai Markup		\$2,000.00	30.00	\$2,800.00



Due to the on-going development of PCRS+, not all menu/sub-menu options or screens may be currently available.

# **PCRS+ DEALER PORTAL GUIDE**

#### NOTES

# REPORTING

Various Sales and Claim reports are available through the Dealer Portal. All, or some of these reports may be available to view based on the permissions assigned to you. Please contact your Sales Representative for additional details.

# RPT603 - Sales Summary Report

The **Sales Summary Report** provides Month-to-Date and Year-to-Date sales data. This report displays Dealer Cost, Dealer Mark-up, Dealer Profit, and monthly Contract Detail for a specified period.

1. Click to expand the **REPORTS** quick link and scroll to the **SALES** section.



- Click the RPT603-Sales Summary link to open the report.
- 3. To view the report, specify the parameters you wish to display. All parameters need to be defined to view the report.



				<b>RPT603</b>	- Sales	Summary
Date From	<select a="" value=""></select>		Date To	v B		View Report
F&I Manager	ALL	7 <b>C</b>	Details	No	D	Export CSV
Contracts By	<select a="" value=""></select>					

4. **Date From:** Select the start date of the date range you wish to report on. Report periods are monthly and beginning date will reflect the first day of the month selected.

	_
<select a="" value=""></select>	/
<select a="" value=""></select>	Â
2020-Feb	
2020-Jan	
2019-Dec	
2010-Nov	

- 5. **Date To:** End date of the report date range. Selected date will reflect the last day of the month selected.
- <Select a Value> V <Select a Value> 2020-Feb 2020-Jan 2019-Dec

ALL

ALL

- F&I Manager: If you track which F&I Manager sold the Contract, select the appropriate F&I Manager. If you do not track, select "ALL".
- 7. Details:

Yes - will display Contract level detailsupporting the summary level data.No - will display summary level data only.

8. Contracts By:

Bill Date\* – Date the TPA received funds for the Contract.
Entry Date – Date the Contract was entered into the PCRS system.
Sale Date – Effective date of the Contract. Yes ▼ Yes No

<select a="" value=""></select>	▼
<select a="" value=""></select>	
Bill Date	
Entry Date	
Sale Date	

\*recommended value

9. When all parameters have been entered, Click View Report to run the report.



10. Account Balance / Period Summary: Shows a summary of sales data for the range specified in the Date From and Date To fields.



- 11. Fiscal Year-to-Date Total: Shows a summary of sales data, year-to-date for the fiscal year, through period specified in the Date To field. The following data populates based on the report parameters specified.
- 12. Gross Contract Count: Number of Contracts, not accounting for cancellations.
- 13. Dealer Net Rate: Total Dealer cost.
- 14. **Retail:** Total retail price paid by the end customer for the Contract.
- 15. Up Front Profit: Contract Retail price *less* Dealer Net Rate.

Fiscal Year to Date - Total			
1/1/2019 - 12/31/2019 Total			
Report Group	Gross Contract Count	Dealer Net Rate	Retail
Appearance Protection	2	\$80.00	\$1,070.00
Etch	15	\$1,512.82	\$1,451.82
GAP	1	\$200.00	\$215.00
Limited Warranty	4	\$692.00	\$694.00
PDR	3	\$405.00	\$405.00
Prepaid Maintenance	3	\$196.13	\$346.13
vsc	12	\$9,866.00	\$11,723.75
Total	40	\$12,951.95	\$15,905.70
		Up Front Profit	\$2,953.75

- 16. **Review Report Detail:** If the report is run *with* Details, Contract detail is populated to support the summary data.
- 17. **Tran Type:** NB is 'New Business' which is any net new Contract accepted by Liberty Shield; A is 'Adjustment' which is any rerate that has been applied to a Contract (an upgrade of Coverage shows a positive number, a downgrade of Coverage shows a negative number).
- 18. Contract Number: Identification number of the customer's Contract.
- 19. VIN: Vehicle VIN Number covered by the Contract.
- 20. New / Used: Indicates if the covered vehicle is new (N) or used (U).
- 21. Contract Sale Date: The Contract's effective date.
- 22. **Customer Last Name:** Last name(s) of the individual(s) covered in the Contract.
- 23. **Coverage:** Name and form number of the customer's Coverage.
- 24. Term/Deduct: Term (months) and the claim deductible for the Contract.

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- 25. Dealer Net Rate: The dealer cost of the Contract.
- 26. Retail: The retail price the customer paid for the Contract.

12/1/2019 - 12/31/	2019 Details	_									
Row Number	Report Group Code	Tran Type	Contract Number	VIN	New / Used	Contract Sale Date	Customer Last Name	Coverage	Term/Deduct	Dealer Net Rate	Retail
1	vsc	NB	CPO89108721-1	5N1AZ2MH6GN108721	U	12/10/2019	Bayes	BRONZE	12/12/\$100.00 Standard	\$1,001.00	\$1,011.00
2	vsc	NB	DEMOG10391PC	3TMJU62N27M036719	N	11/02/2015	324	Bronze Luxury	12/12/\$0.00 Disappearing	\$660.00	\$735.00
3	vsc	NB	SAMS18336PC	5FNRL18083B104136	N	06/04/2018	NAGELVOORT	Bronze Luxury	36/36/\$100.00 Standard	\$648.00	\$688.00
4	vsc	NB	SAMS18417PC	WMWWG9C35H3C80976	N	12/13/2019	RANDERSON	BRONZE	12/12/\$100.00 Standard	\$1,101.00	\$2,500.00
	Total								Total	\$3,410.00	\$4,934.00



Details can only be pulled if a single month is selected in the **Date From** and **Date To** fields.

# RPT151 - Contract Sale Report

The **Contract Sale Report** provides all Contract sales within the given parameters sorted by dealer. Allows for reporting by a specific date range or by entire months.

1. Click to expand the **REPORTS** quick link and scroll to the **ADMIN** section.

REPORTS	HELP	
Admin Re	eports	>
Base Rep	oorts	>

2. Click the **RPT151-Contract Sale** link to open the report.



3. To view the report, specify the parameters you wish to display. All parameters need to be defined to view the report.

RPT151 -Contract Sale							
Coverage	ALL	• <b>(A)</b>	Remittance Payee Type	<select a="" value=""> 🔻 🕒</select>		View Report	
Contracts By	<select a="" value=""> 🔻 🗿</select>		Date From (MM/DD/YYYY)		O	Export CSV	
Date To (MM/DD/YYYY)		8	Hide Empty Contracts	Yes 🔻 🕒			
			A				

A. Coverage: Select a specific Coverage *or* ALL to report on all Coverages sold.

ALL 🔻
ALL
Bronze Luxury
CV-AC-ALL-01
Gold

# Your Technology Partner PCRS+ DEALER PORTAL GUIDE

# **B. Remittance Payee Type:** Select the type of Remittance Payee.



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- C. Contracts By: Select how you wish to report on your Contracts. This should follow the same method used for all Contract sales reporting.
- D. Date From: Enter the beginning date you wish to report on. The format must be MM/DD/YYYY as specified.
- E. Date To: Enter the ending date to report to. The format must be MM/DD/YYYY as specified.
- F. Hide Empty Contracts: Select Yes to *exclude* or No to *include* empty Contracts.

<select a="" value=""></select>	
<select a="" value=""></select>	
Entry Date	
Sale Date	

Date From (MM/DD/YYYY)

Yes No

Date To (MM/DD/YYYY)

**G.** When all parameters have been entered, click **View Report** to process and display.

	RPT151 -Contract Sale										
Coverage	ALL	Remittance Payee Type ALL	View Report								
Contracts By	Sale Date 🔻	Date From (MM/DD/YYYY) 1/1/2020 12:00:00 AM	Export CSV								
Date To (MM/DD/YYYY)	2/29/2020 12:00:00 AM	Hide Empty Contracts Yes									
14 4 1 of 1	⇒ ↓1 _ ↓	Find   Next 🔍 🔹 🚱									

The report will display the entered paramenters within the specified date range(s).

PC Your Technology	y Partner				BOBAKS United States IL-ILLINOIS Randy's Autos 1/1/2020 - 2/29/2020					
Dealer	Contract Number	F & I Manager Name	Sale Date	Deal #	Customer Name	Coverage	VIN	Vehicle Information	Net Rate	Remitted
Randy's Autos 1060 W ADDISON ST CHICAGO IL -	1259888		02/20/2020		RANDY TESTING PPTW	Tire & Wheel 0 Months	1G4HA5EM7BU111466	2011 BUICK Lucerne CX	\$276.00	\$ <b>0</b> .
60613	SAMS18421PC		01/02/2020		RANDY PRICE	Bronze Luxury 0 Months	WMWWG5C50K3H08535	2019 MINI Convertible Cooper	\$638.00	\$638.
	SAMS18422PC		01/02/2020		JOHN SMITH	Bronze Luxury 0 Months	WMWWG9C59K3J30911	2019 MINI Convertible Cooper S	\$529.00	\$529.
	SAMS18424PC		01/03/2020		AMBER ATKINS	Bronze Luxury 0 Months	1FA6P8TH3G5219592	2016 FORD Mustang EcoBoost	\$638.00	\$638.
	SAMS18425PC		01/03/2020		BECKY LEEMAN	Bronze Luxury 0 Months	1FA6P8CF9K5140614	2019 FORD Mustang GT	\$515.00	\$515
	SAMS18426PC		01/03/2020		JIMMY JOHNSON	Bronze Luxury 0 Months	1FATP8FF9K5121026	2019 FORD Mustang GT Premium	\$638.00	\$638.
	SAMS18427PC		01/14/2020		TEST TEST	Bronze Luxury 0 Months	1FATP8FF9K5121026	2019 FORD Mustang GT Premium	\$239.00	\$239.
	SAMS18432PC		02/04/2020		RANDY PRICE	BRONZE No Claims INS 0 Months	WMWWG9C59K3J30911	2019 MINI Convertible Cooper S	\$55,721.66	\$0.
	SAMS18433PC		02/19/2020		RANDY PRICE	Bronze Luxury 0 Months	WMWWG9C59K3J30911	2019 MINI Convertible Cooper S	\$239.00	\$0.
	TG10399014		01/23/2020		BOB SMITH	Tire & Wheel 0 Months	WMWWG9C59K3J30911	2019 MINI Convertible Cooper S	\$272.00	\$272.
								Total For Randy's Autos	\$59,705.66	\$3,469.



The availability to view and run reports is based on user-assigned permissions. If you do not have, or wish to have access to reports, please contact your Admin.

# RPT200 - Sale Register Processed Report

The Sale Register Processed Report provides a summary of all Contracts processed within a single remittance. This report will display only after Contracts have been remitted via the Process Register.

1. Once the remittance process has been completed, RPT-200 will display in a separate tab.

14	4 1 0	of 1 🕨	ÞI 4		RP	Find   Next 🔍	le Ro	egi	ster P	roces	sed	Repor	t		
					RP	PT200 - Sale Re	gister	Proc	essed Re	port				2020-Ma	r-09 10:07 AN
Dealer	Randy's Aut	tos - RD7	20		REGISTER Register 8	t 820200309	10950266	BANK	Name		0	IECK Jack Date			3/9/202
Dealer Payee	Randy's Aut PCMI Comp 1030 HIGGINS F	tos - RD7 Iany RDPARK RIC	20 GE, IL 60068		REGISTER Register # Register C	t R20200309- Date	-10950266 3/9/2020	BANK Bank Accou	Name Int Number			IECK leck Date leck Number leck Amount D	Due		3/9/202 \$239.0
Dealer Payee	Randy's Aut PCMI Comp 1030 HIGGINS F Contract #	tos - RD7 any RDPARK RID Stock #	GE, IL 60068 Sale Date	Custom Product N	REGISTER Register II Register D er/ Iame	t R20200309- Date Vehicle	-10950266 3/9/2020 Reta	BANK Bank Accou	Name Int Number Amount Due	Submitted	CI CI CI NET Cost	IECK teck Date teck Number teck Amount D Dealer Cost	Due Tax1 - 15- 20-23	Tax2 - 25- 35-41	3/9/202 \$239.0 Total
Dealer Payee	Randy's Aut PCMI Comp 1030 HIGGINS F Contract # SAMS18433PC	tos - RD7 Iany RDPARK RID Stock #	20 GE, IL 60068 Sale Date 2/19/2020	Customi Product N RANDY PRICE Bronze Luxury	REGISTER Register II Register D er/ Iame	t R20200309- Date Vehicle Vehicle 2019 MINI Convertible Cooper 5	-10950266 3/9/2020 Reta	BANK Bank Accou	Name Int Number Amount Due \$0.00	Submitted \$239.00	NET Cost \$239.00	HECK teck Date teck Number teck Amount D Dealer Cost \$239.00	Due Tax1 - 15- 20-23 \$0.00	Tax2 - 25- 35-41 \$0.00	3/9/202 \$239.0 Total \$239.0

2. All Contracts remitted will be assigned to the specified Register #. The remittance details can be view at a later date by referenceing the Register Number.

REGISTER	
Register #	R20200309-10950266
Register Date	3/9/2020



3. The report can be downloaded in various formats. Select the format you wish to download the report; CSV (comma delimited) is the recommended format.



Contracts *must* be remitted via the Process Register for RPT200 – Sale Register Processed Report to display.

# RPT905 - Dealer Billing Statement

The **Dealer Billing Statement** is a core report which provides a full monthly summary of Contract billing activity. This serves as the main report which dealers refer to for a monthly summary of all billing activity.

Contracts will display in RPT905 – Dealer Billing Summary only if the Coverage Insurance Company Type of Administrator is selected.

1. Click to expand the REPORTS quick link and scroll to the ADMIN section.

REPORTS	HELP	
Admin Re	eports	>
Base Rep	orts	>

2. Click the RPT905 – Dealer Billing Statement link to open the report.



3. To view the report, specify the parameters you wish to display. All parameters need to be defined to view the report.



A. Billing Party: Select the Billing Party from the drop-down list.

PCMI CORPORATION | CONFIDENTIAL

**B. Billing Period:** Select the month you wish to report for. This will include all days within the selected calendar month.



4. When all parameters have been entered Click View Report to process and display.

	RPT90	5	- Dealer B	Billing S	Staten	nent
Billing Party	Randy's Autos	¥	Billing Period	2020-Feb	¥	View Report Export CSV

5. The report will display the data for within the specified (month) date range.

	RPT90	)5 - D	ealer	Billin	g State	emer	nt		
		2020-Feb	o-01 - 2020	)-Feb-29	(2020-Feb)		J		
Randys Auto Center 1060 W ADDISON ST CHICAGO IL60613		C	)			Ģ		e	
		New C	ontracts	Cancelle	d Contracts	Adjuste	d Contracts	Net C	ontracts
Product Type	Report Group Code	Quantity	Amount	Quantity	Amount	Quantity	Amount	Quantity	Amount
Appearance Protection	APP	1	\$220.00	0	\$0.00	0	\$0.00	1	\$220.00
Appearance Protection	Total	1	\$220.00	0	\$0.00	0	\$0.00	1	\$220.00
PDR	PDR	1	\$67.00	0	\$0.00	0	\$0.00	1	\$67.00
PDR	Total	1	\$67.00	0	\$0.00	0	\$0.00	1	\$67.00
Prepaid Maintenance	PPM	2	\$904.00	0	\$0.00	0	\$0.00	2	\$904.00
Prepaid Maintenance	Total	2	\$904.00	0	\$0.00	0	\$0.00	2	\$904.00
VSC	VSC	6	\$3,567.60	1	(\$474.85)	0	\$0.00	5	\$3,092.75
VSC	Total	6	\$3,567.60	1	(\$474.85)	0	\$0.00	5	\$3,092.75
ContractTotal									\$4,283.75
Billing Statement Adjustments									\$70.00
Claims Credits									(\$22.00)
Grand Total		10	\$4,758.60	1	(\$474.85)	0	\$0.00	9	\$4,331.75
Current Period Billing State	ment Adjustments	E							
Billing State	ment Adjustment Descrip	tion	·	Balance					
CC Processing Fee				\$35.00					
NSF on check 12345				\$35.00	)				
Total				\$70.00	2				

- **A. Product Type/Report Group Code:** Contract billing activity by product type sum, total, and Report Group code.
- **B.** New Contracts: Count of Contracts and gross sum of total \$ remitted by product type.
- **C. Cancelled Contracts:** Count of cancelled Contracts and \$ amount of the credit.
- **D.** Adjusted Contracts: Count and sum of \$ (debit or credit) for Contracts that have been adjusted within the specified reporting period.
- **E.** Net Contracts: Net count and \$ amount(s) by product type, billing statement adjustments, and claims credits for the reporting period.
- **F.** Billing Statement Adjustment Description: Detailed line item description and amount of net billing statement total.

#### **VERSION 4.0**

6. To view additional pages of the report, use the forward or backwards arrows located in the Report Header section.



**7.** Current Period Claim Credits: Provides detial information of \$credit amount per claim with line item claim detail.



 Current Period New Business with Adjustment, Cancellation, Reinstatement for New Business: Detail of new business billed within the Contract billing period. Displays \$ due, \$ applied, and \$ balance per Contract with details.

Sale	Dilling	Contract	Name	MIN	C1	Trees	Desister #	Dura	Annelied	Delener
Date	Date	Number	Name	VIN	Coverage/ Report Group	Type	Register #	Due	Applied	Balance
9/24/2019	10/17/2019	010109261	BRIAN BARHAM	1GYKNARS9HZ159041	MAX-AP APP	NB	R20191017-10837626	\$220.00	\$0.00	\$220.00
10/17/2019	10/17/2019	PDR1001863	GREG SMITH	1GYKNAR59HZ159041	CVP-PDR PDR	NB	R20191017-10837626	\$67.00	\$0.00	\$67.00
9/24/2019	10/17/2019	PM10003120	BRIAN BARHAM	1GYKNAR59HZ159041	FMM-CONV 3,000 PPM	NB	R20191017-10837788	\$483.00	\$0.00	\$483.00
10/17/2019	10/17/2019	PM10003204	GREG SMITH	1GYKNAR59HZ159041	FMM-CONV 3,000 PPM	NB	R20191017-10837626	\$421.00	\$0.00	\$421.00
9/24/2019	10/11/2019	VSC10094407	BRIAN BARHAM	1GYKNAR59HZ159041	SG-N-GOLD VSC	NB	R20191011-10833357	\$945.00	\$0.00	\$945.00
10/2/2019	10/2/2019	VSC10095214	Lana Kofron	1GYKNARS9HZ159041	SG-N-PLAT - AUTHORIZE VSC	NB	R20191002-10825633	\$85.00	\$85.00	\$0.00
10/2/2019	10/2/2019	VSC10095215	LANA KOFRON	1GYKNARS9HZ159041	SG-N-PLAT - AUTHORIZE VSC	NB	R20191002-10825712	\$85.00	\$85.00	\$0.00
10/9/2019	10/9/2019	VSC10095849	Jen Schumal	1GYKNARS9HZ159041	SG-N-PLAT - AUTHORIZE VSC	NB	R20191009-10832071	\$85.00	\$85.00	\$0.00
10/9/2019	10/11/2019	VSC10095854	RUSSELL BILLING	1FTFW1ET1CFB13524	SG-N-PLAT - (CAMPAIGN) VSC	NB	R20191011-10833781	\$1,036.00	\$0.00	\$1,036.00
10/17/2019	10/17/2019	VSC10096557	GREG SMITH	1GYKNARS9HZ159041	SG-N-PLAT VSC	NB	R20191017-10837626	\$1,331.60	\$0.00	\$1,331.60
Total								\$4,758.60	\$255.00	\$4,503.60

9. Current Period Adjustment, Cancellation, Reinstatement for Contracts Remitted in the Previous Period: Detail of new business billed within 1 previous Contract billing period. Displays \$ due, \$ applied, and \$ balance per Contract with details.



10. Current Period Adjustment, Cancellation, Reinstatement for Contracts Remitted Two (2) Previous Period: Detail of new business billed within 2 previous Contract billing period. Displays \$ due, \$ applied, and \$ balance per Contract with details.



11. Current Period Adjustment, Cancellation, Reinstatement for Contracts Remitted Three (3) Previous Period: Detail of new business billed within 3 or more previous Contract billing period. Displays \$ due, \$ applied, and \$ balance per Contract with details.



Current Period	Current Period Adjustment (Adj), Cancellation (C), Reinstatement (R) for Contracts Remitted three (3), or more Previous Periods													
Sale Date	Billing Date	Contract Number	Name	VIN	Coverage/ Report Group	Trans Type	Register #	Due	Applied	Balance				
5/30/2019	10/17/2019	VSC10083765	ANDREW KERPER	3VWDP7AJ2CM369518	SG-N-PLAT - (CAMPAIGN) VSC	С	R20191206-10878039	(\$474.85)	\$0.00	(\$474.85)				
Total								(\$474.85)	\$0.00	(\$474.85)				

12. Pending Contracts – Not Registered: Contracts Created within the specified period but un-remitted including number of days pending. Remit through the Process Register to remove from Pending Contracts.

PCRS Entry Date	Sale Date	Number of Days Pending	Contract Number	Name	VIN	Coverage/ Report Group	Amount	Notes
2/26/2020	2/26/2020	13	010117612	Mark Nagelvoort	1G1YY125X15107022	MAX-AP APP	\$220.00	
3/9/2020	3/9/2020	1	VSC10111318	mark nagelvooer	1C4NJPFB8CD615476	SG-N-PLAT - (CAMPAIGN) VSC	\$1,306.00	
3/9/2020	3/9/2020	1	010118340	mark nagelvooer	1C4NJPFB8CD615476	MAX-AP APP	\$220.00	
otal							\$1,746.00	

**13. Pending Adjustments, Cancellations, Reinstatements:** Displays all pending adjustments, cancellations, and reinstatements.

Pending Adjustments, Cancellations, Reinstatements												
PCRS Entry Date	Trans Date	Number of Days Pending	Trans Type	Contract Number	Name	VIN	Coverage/ Report Group	Amount	Notes			
Total								\$0.00				