PCRS+ Dealer and Portal Guide

PCMI Corporation

PCMI
Your Technology Partner

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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+
- Quick Rater
- Search Contract
- Add 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.
2. Enter the login email and password for the selected URL.
3. Click **Login**.

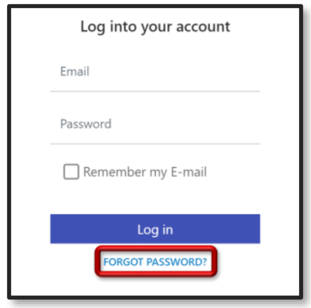
URL/Web Address:____

Email: ____________________________________

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

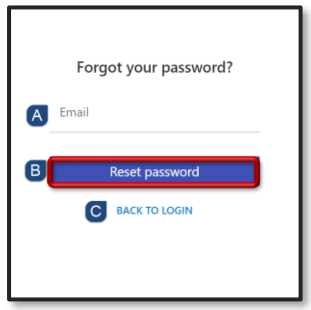
Password Recovery

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



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

2. The **Forgot Your Password** screen will display:



   A. Enter your Email.

   B. Select Reset Password.

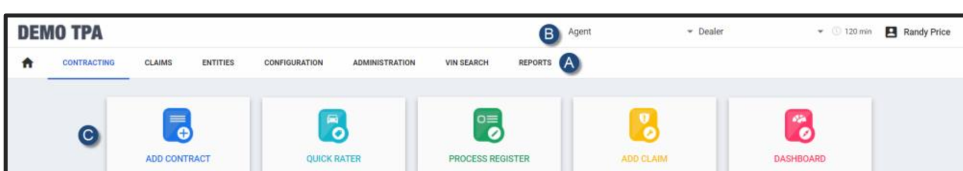
   C. If you wish to exit without resetting your password, click **BACK TO LOGIN**.

3. 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.

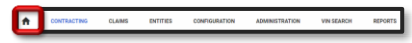
PCRS+ Homepage

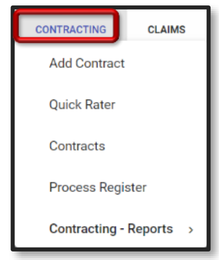
The PCRS+ home screen provides several new options for streamlined access. These options include:



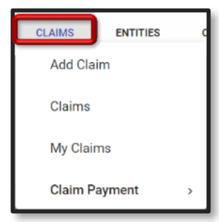
Navigation Menu: The left side menu has been replaced with a cascading options menu. To view the options available under each section, simply hover your mouse over the option to display the menu and sub-menu.

Home: takes you to the PCRS+ Homepage.

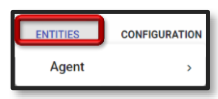




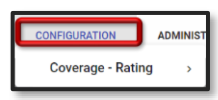
Contracting: Provides access to various Contract options and the Process Register.



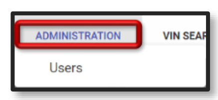
Claims: Access to various Claims options including **My Claims** screen and **Claim Payment** which contains a sub-menu for **Process Claims**.



Entities: Access the **Agent** and sub-menu for **Search Agent**.

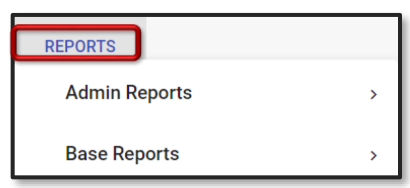


Configuration: Provides access to Coverage-Rating and Eligibility Tiers.

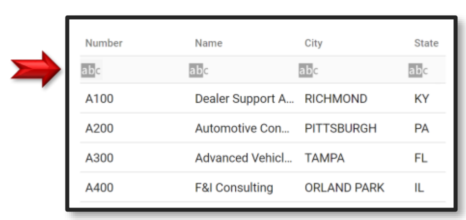


Administration: Access to Users and Permissions and sub-menu for Users.

VIN Search: Access to the VIN search screen within PCRS+.



Reports: Access to PCRS+ Reports by category and a sub-menu for each.

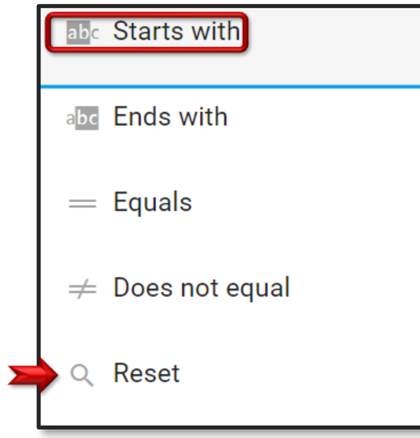


Select an Agent / Select a Dealer: You can now search and select an Agent or Dealer from the header section.

New search options allow for a more detailed search by each field as well as search on multiple parameters.

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.

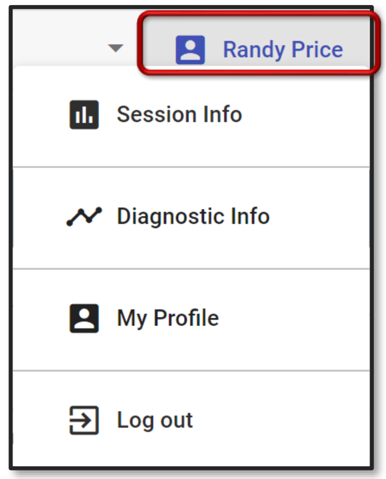
To clear search parameters, click **Reset**.



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

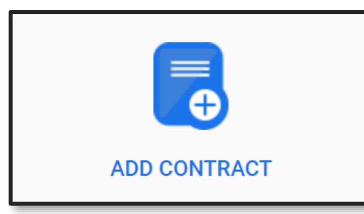
- Session Information
- Diagnostic Information
- My Profile
- Logout

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



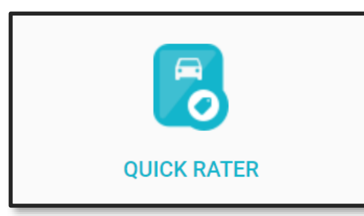
Click to launch the **Add Contract** screen and begin the Contract rating process.

Be sure to select a Dealer!

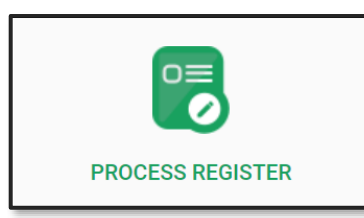


Click to launch the **Quick Rater** screen and begin the Contract rating process.

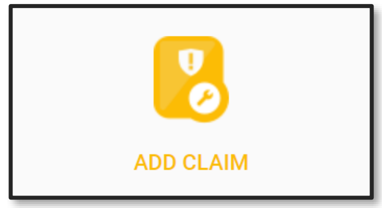
Be sure to select a Dealer!



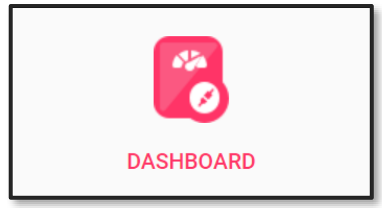
Click to launch the **Process Register** to remit Contracts, Claims, and Other transactions.



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



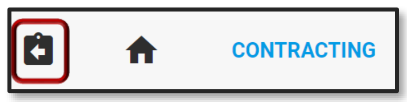
Click to launch the **Sales Dashboard**.



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 icon in the upper left 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.

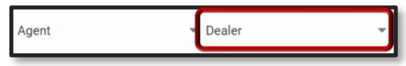
NOTES

CONTRACTING

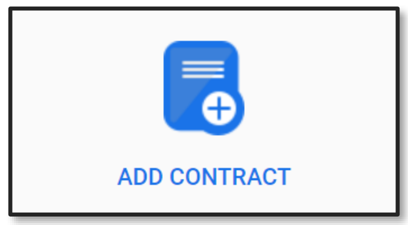
Add Contract

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

1. From the PCRS+ Homepage, select a dealer that you wish to add a Contract for.



2. Select **ADD CONTRACT** to open the Deal Setup screen and begin adding a Contract.

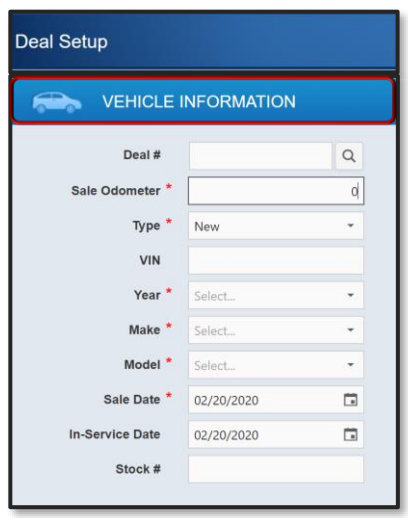


If the Add Contract screen does not appear, be sure you have 'allow pop-ups from this site' enabled in your browser.

3. On the left side of the screen, enter the **Vehicle Information**. All fields with a **red *** are *required*.

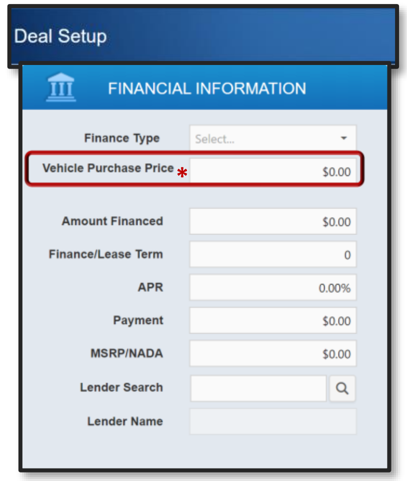
   Enter the Year, Make, and Model, as required or entering the VIN, will decode this information and automatically populate the fields.

   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.



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.

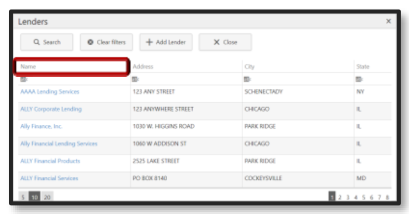


Full financial information is required to return rates for GAP products.

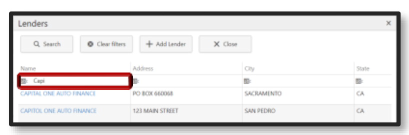
Lender Search

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.

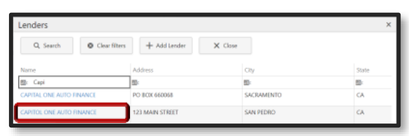


3. Type the name of the Lender in the **Name Search Field**. The field will search and narrow the Lenders as you type.



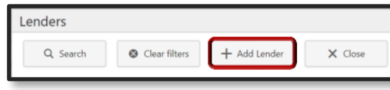
4. If the correct Lender appears in the list, select the lender name, and proceed to **Product Selection**.

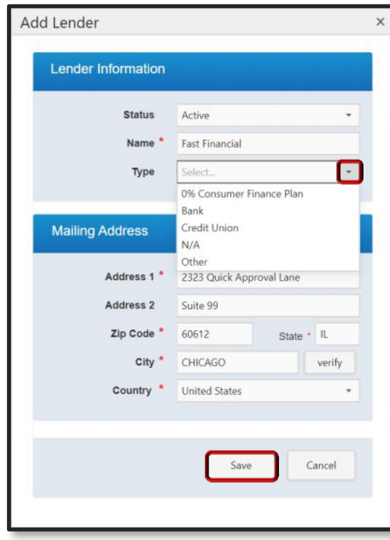
   If the Lender does not exist; you will need to continue to **Add Lender** and add the Lender.



Add Lender

5. To add a new Lender not yet in the database, click **+ Add Lender** to display the **Add Lender** screen.





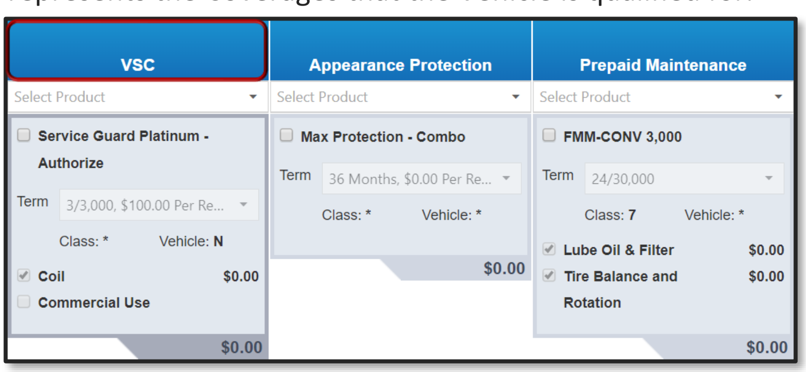
6. Enter the required Lender Information * including the Lender Type from the drop-down box.
7. When finished, click the **SAVE** button to save and add the Lender.

   The Lender will now appear in the Lender Search.

Product Selection

1. 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.

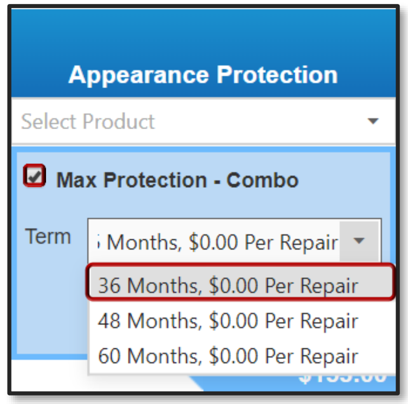
2. The **Select Products** page will display the entire list of products for which the Vehicle is qualified. Each section represents the various Coverages, and each box represents the Coverages that the Vehicle is qualified for.



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.

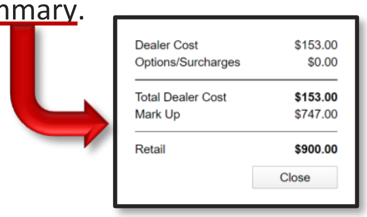


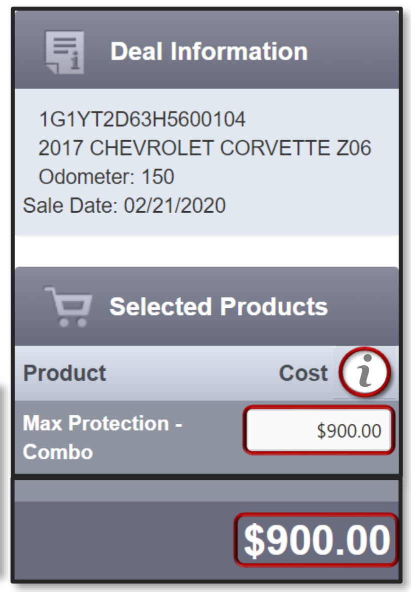
Product Pricing

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

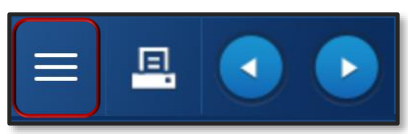
   The total (sum) of all Coverages selected displays at the bottom of the Selected Products screen.

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

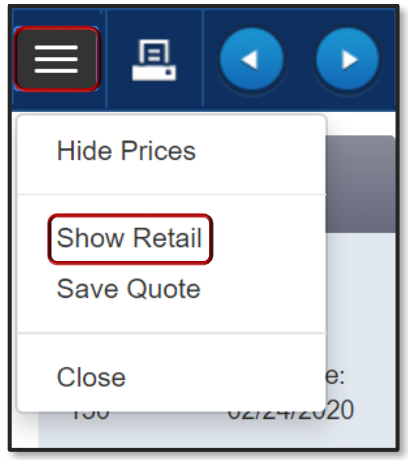




2. You can view the Retail Price or Dealer Cost by clicking on the three horizontal lines (hamburger menu).



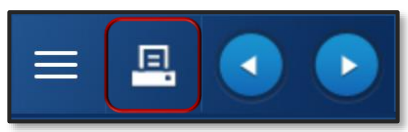
3. From the menu, you can switch between viewing Cost or Retail by selecting the **Show Dealer Cost** or **Show Retail** view.



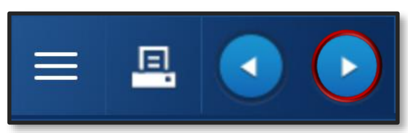
4. When the **Show Retail** view is selected, the pricing box below the Cost Header will open for editing the retail price of the Coverage being charged to the Customer.

   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.

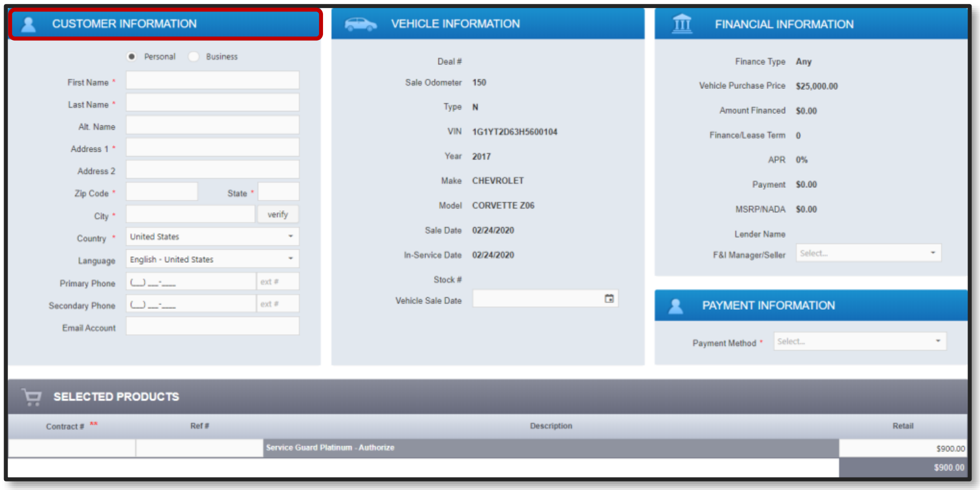


6. To proceed to the Customer Information screen, click the right arrow button in the upper right corner of the page to move forward.



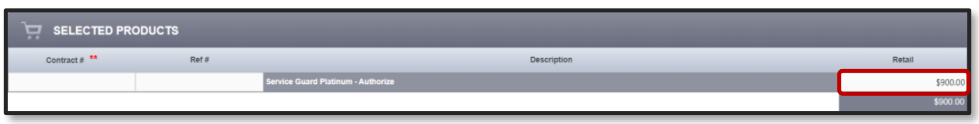
Customer Information

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

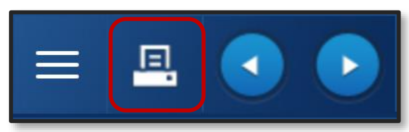


All fields with the **red** * indicate required information must be entered before proceeding.

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

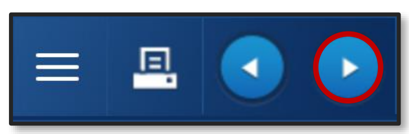


3. ‘Click” the Printer icon to preview a sample of the Contract prior to submission.



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.

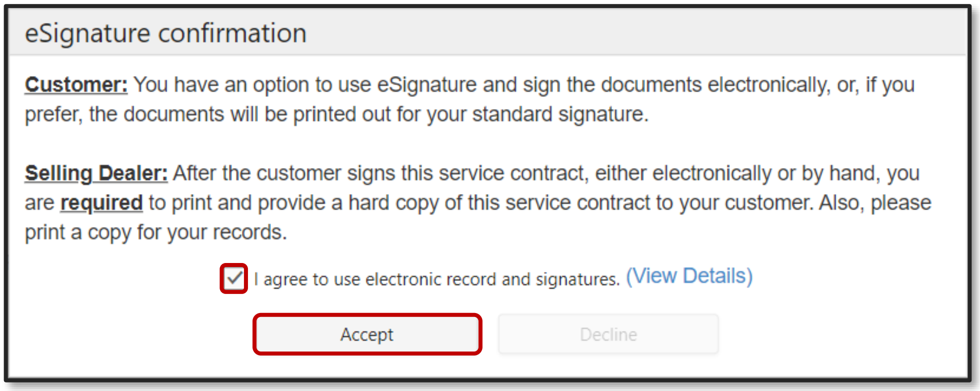
4. Click the Right Arrow button in the upper right corner to submit the Contract.



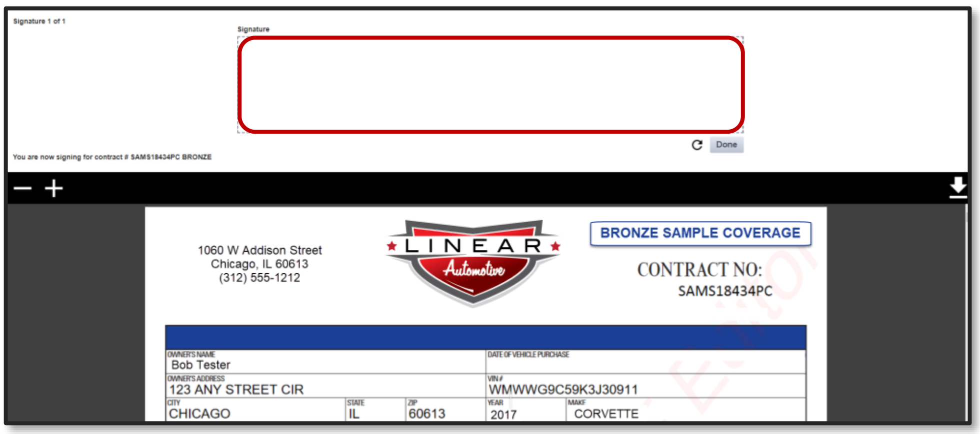
eSignature

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.

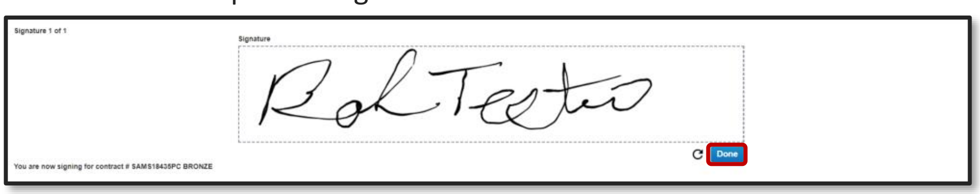
   If your Customer chooses to use the eSignature option, they must click the I Agree checkbox *and* Click the Accept button.



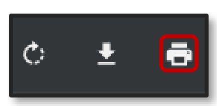
6. The signature screen is displayed with the Customer Signature box at the top and the Contract below. The Customer may sign within the Customer Signature Box using the mouse.



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.

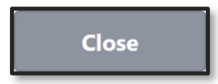
Print 3 copies for your Customer to sign:

- 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.



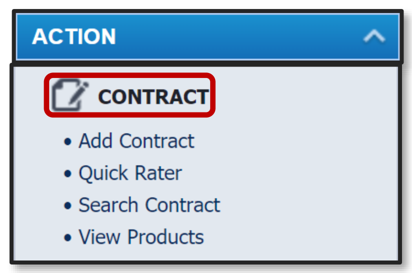
NOTES

QUICK RATER

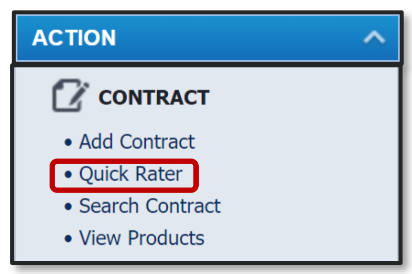
The Quick Rater function of the Dealer Portal allows you to electronically rate a Coverage using only the vehicle details (Odometer, Type, Year, Make, Model, Sale Date). When the vehicle details are populated, the VIN is not required to rate a Contract. You may use the VIN in place of the vehicle details,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

Open Quick Rater

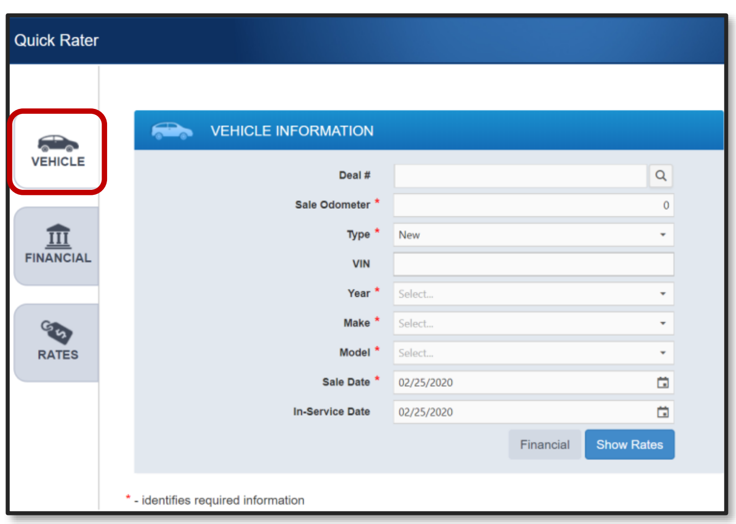
1. Click to expand the **ACTION** side menu bar and scroll to the **CONTRACT** section.



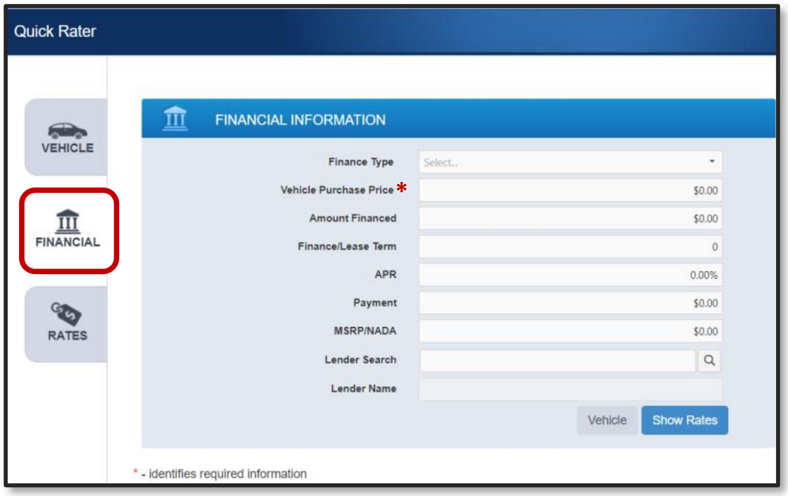
2. Click the **Quick Rater** link to begin rating a Contract.



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

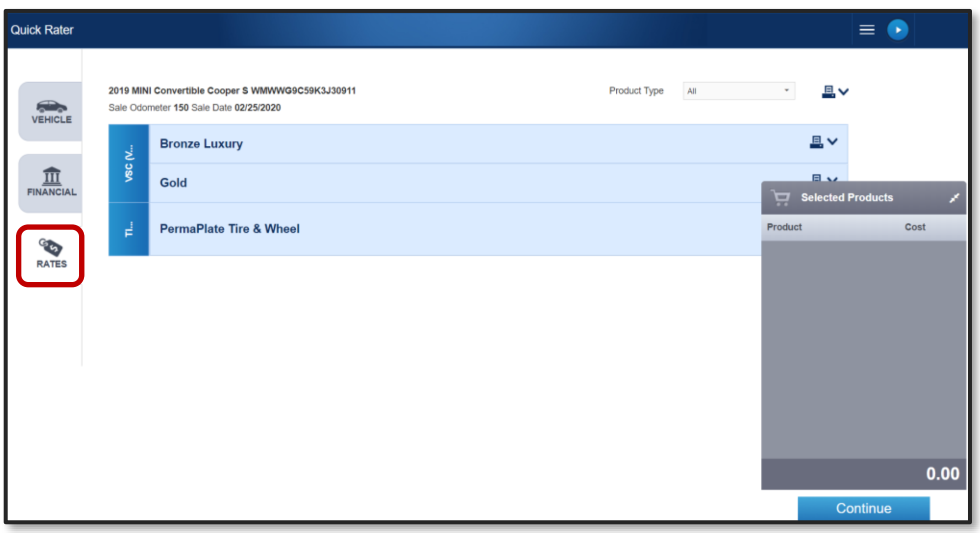


4. Click the Financial tab and enter the required information * on the Financial Information screen.



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.

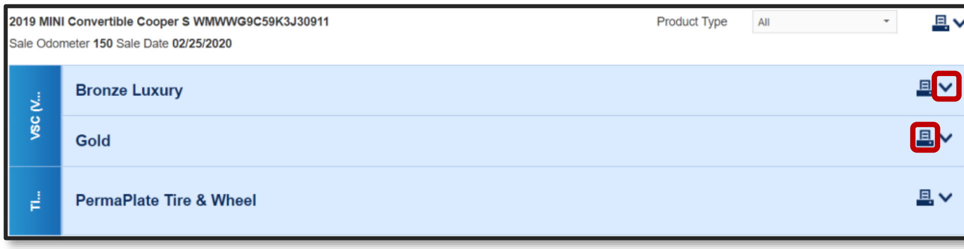


7. If the cart is obstructing the Coverage drop-down arrows; you may 'collapse' the cart using the arrows in the upper right corner.

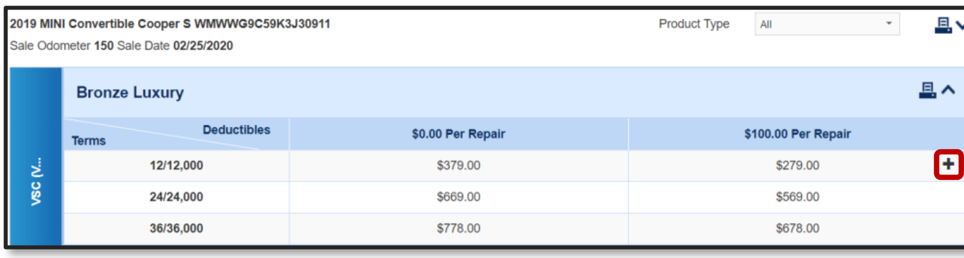
To restore the cart, simply Click the cart icon in the lower right corner of your screen.

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.

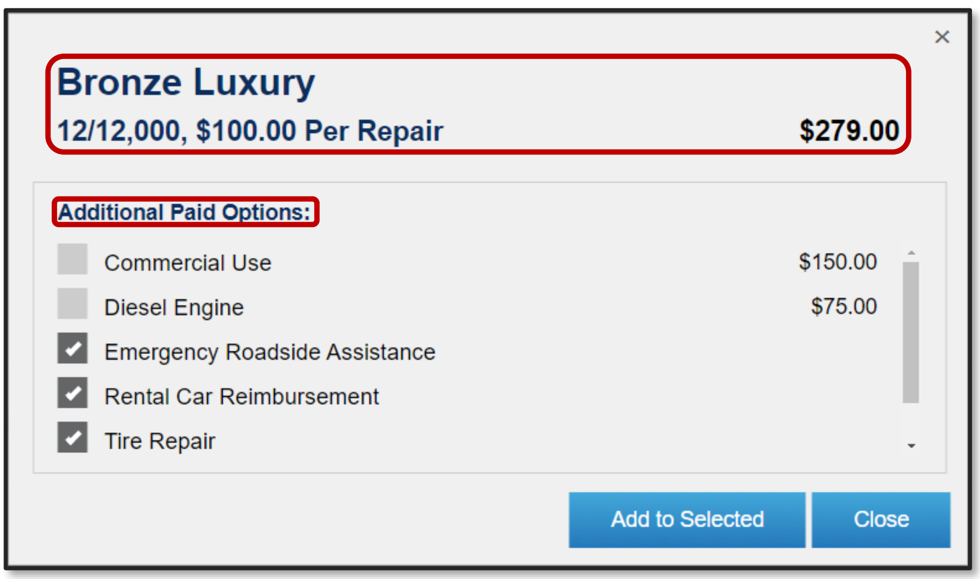


9. Hovering over a Coverage with the mouse will display the **+** symbol. Click the **+** to preview a pop-up of the Coverage rate.



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.



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.

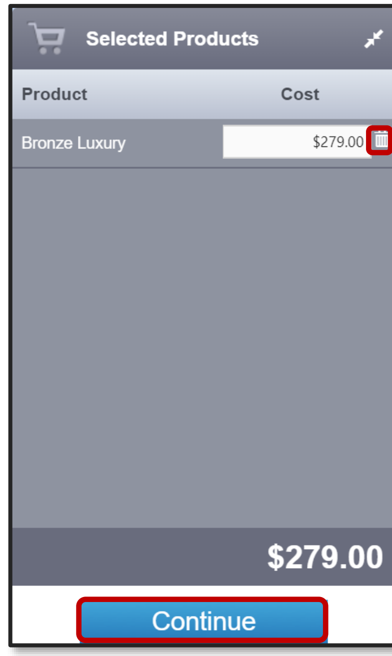
14. If minimized, Click the cart icon at the bottom of the screen to open the cart.

15. Your cart will display the selected Coverage(s) and the price per each as a line item.

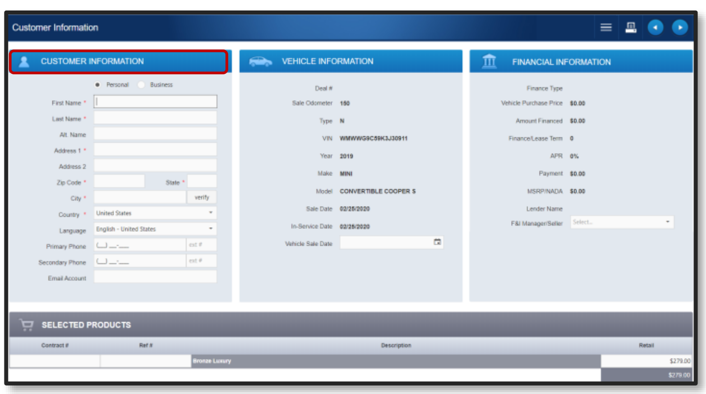
    The total for all Coverage(s) selected is displayed at the bottom of the cart screen.

16. If you wish to remove a Coverage, click the trash can to remove from your cart.

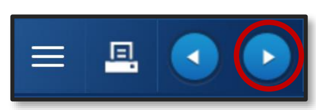
17. Click Continue, to continue with the selected Coverage(s) and finish entering the customer details.



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.



NOTES

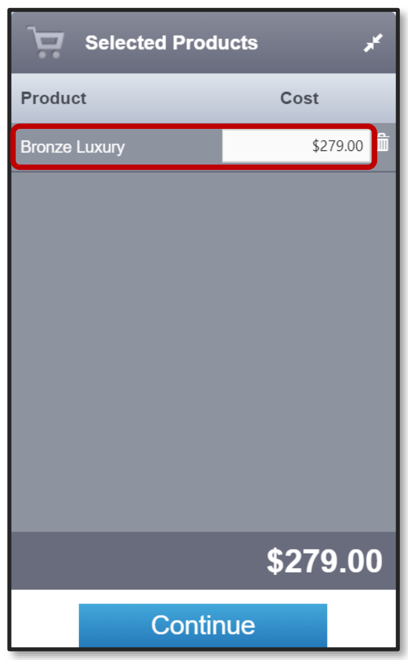
QUOTES

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.

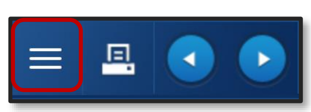
Create and Save a Quote

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

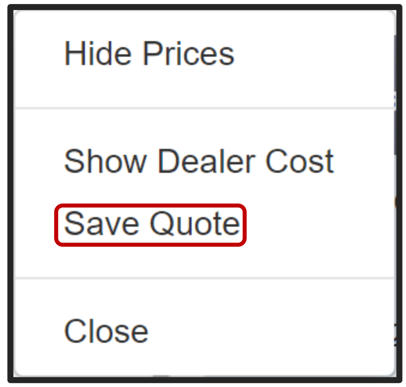
   Enter all the vehicle and financial information required; select a rated Coverage or Coverages, and add them to the cart.



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

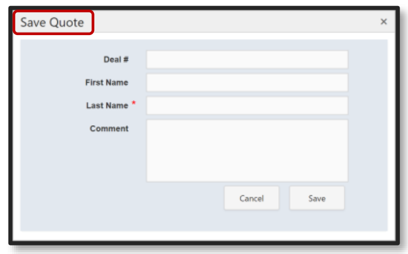


3. Select the **Save Quote** option to proceed.



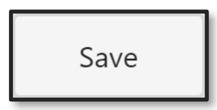
4. The **Save Quote** screen will display. Fill in the following information:
5. **Deal #** (not required but recommended).
6. **Last Name** (required).

Complete any additional information fields you choose.



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.



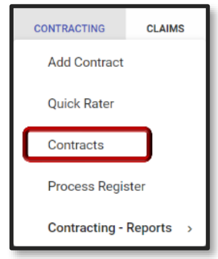
NOTES

SEARCH CONTRACT

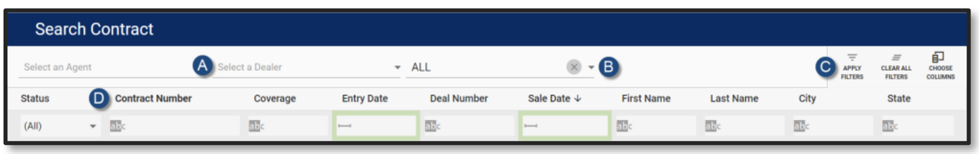
Open Search Contract

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.

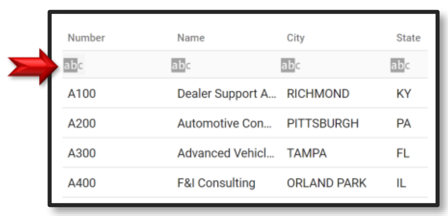


Search Contract Filter Options

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

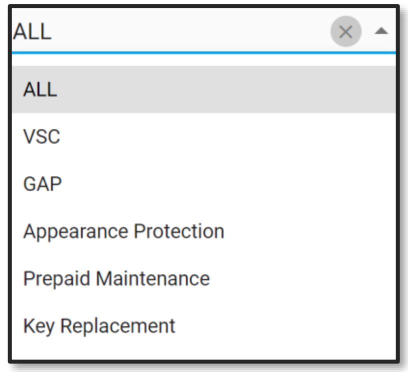
   All search criteria available for selecting an **Agent/Dealer** in the Contract Header screen are available on this screen.

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

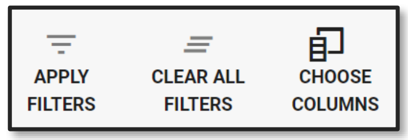


> If you select an **Agent/Dealer** in the **Contract Header**, it will auto-populate the corresponding field on the **Search Contract** main screen.

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

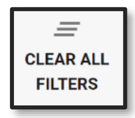


5. The following filter options are available to allow you to customize your view based on desired filters applied to the **Search Contract** screen.

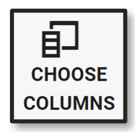


APPLY FILTERS: Click after all desired filters have been created. This will apply your filtered view to the **Search Contract** screen.

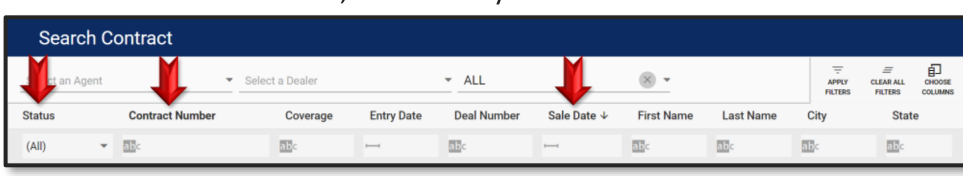
CLEAR ALL FILTERS: Click to remove _all_ filter selections from the **Search Contract** screen.



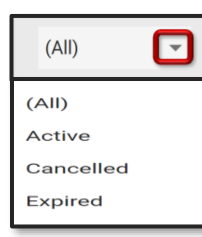
CHOOSE COLUMNS: Allows you to choose columns to add/remove on the **Search Contract** screen.



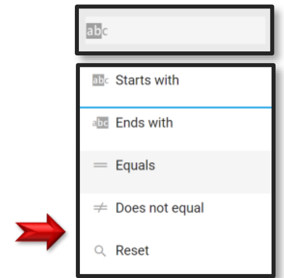
6. New interactive filter options have been added to PCRS+, allowing you to create a more detailed view, filtered to your needs.



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

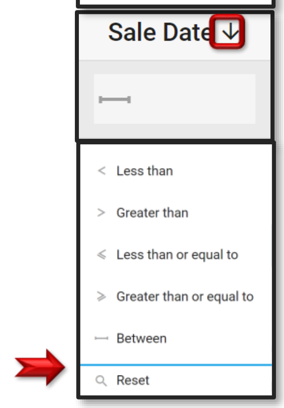


abc **Text Filter:** Provides the ability to filter by text filters or simply type free-form text directly into the search field.



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

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



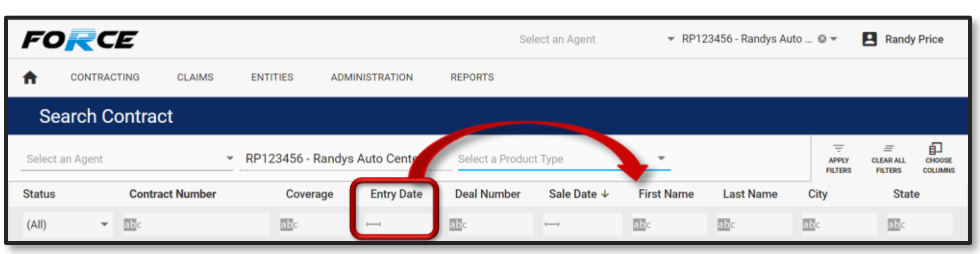
Clicking in the search field provides a calendar with selectable dates. Use the **Reset** option to clear search criteria. Ascending/Descending column sort available when the arrow exists to the right of the column name.

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

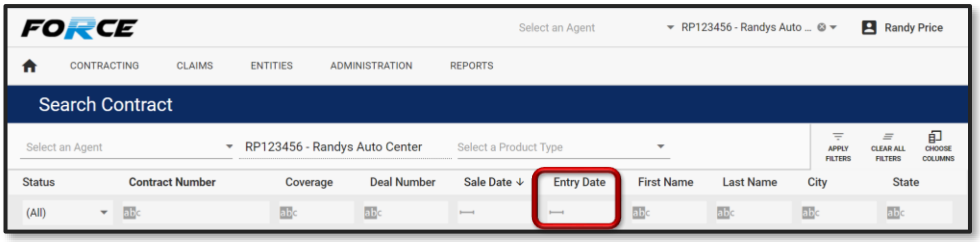
Custom Column View

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.

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



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

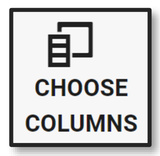


User customized columns are tied to individual Log In credentials. All custom settings will appear based on your Log In, not the PC you are working on.

Add or Remove Columns

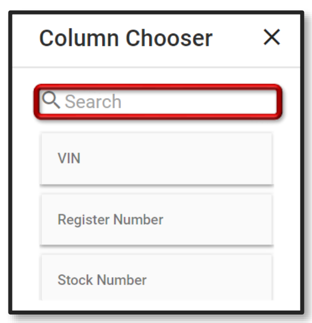
Users are now able to choose which columns you would or would not like to view. Columns can be added or removed quickly from view using the **Choose Columns** option.

1. Click the **Choose Columns** button.

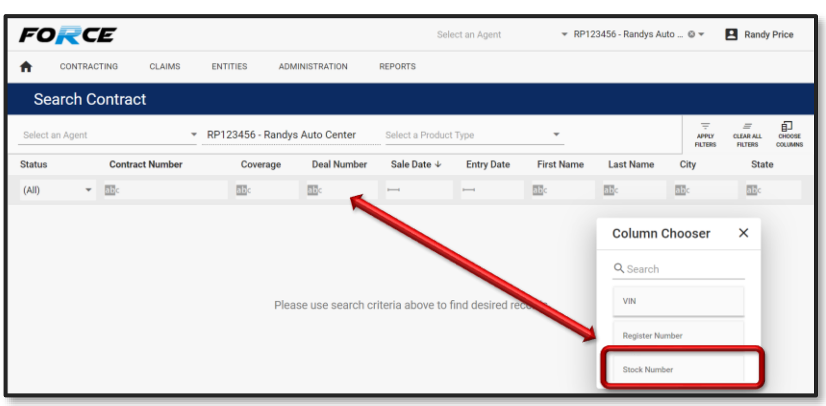


2. Use the **Choose Columns** option to add or remove columns you wish to see in your view.

   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 screen.



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.

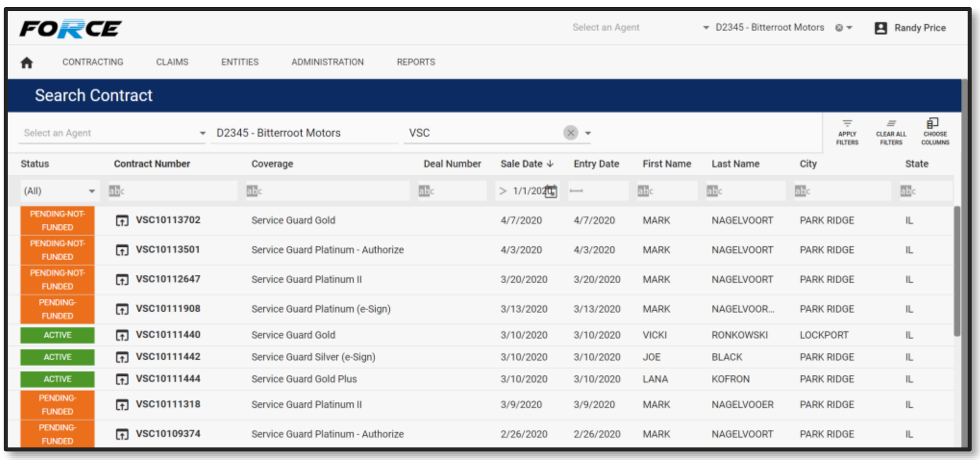
> Not all columns are available to re-arrange, add, or remove. In most instances, the first two left-side columns may be static and cannot be changed.

Search Contract View

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

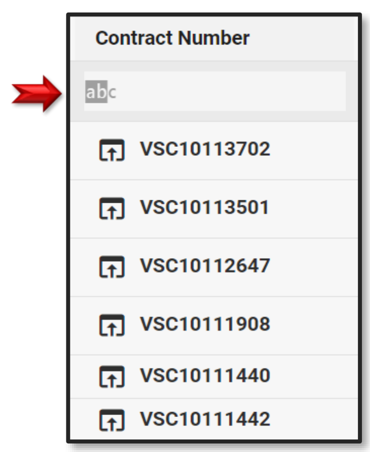
1. Select the Dealer/Agent and create your desired filters. Click **APPLY FILTERS** to display Contracts.

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

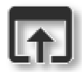


3. To view a displayed Contract, click the **Contract Number** to view.

   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.

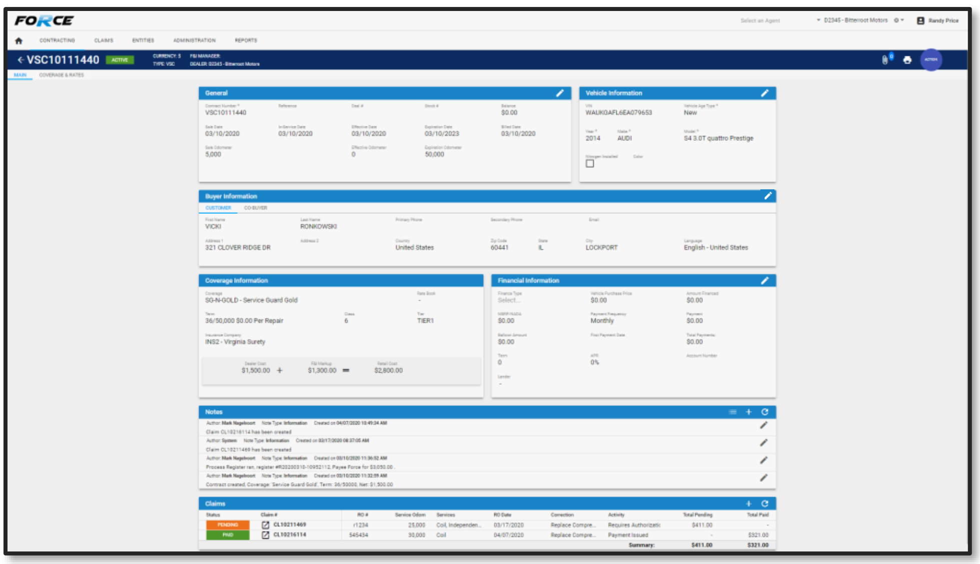


Indicates that the selected link will open in the current browser window.

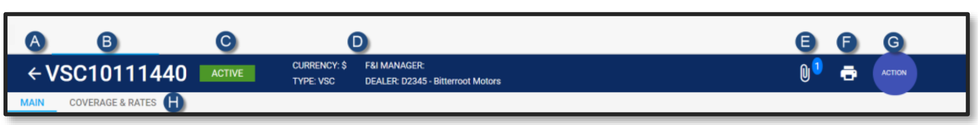
Indicates that the selected link will open in a separate browser window.

> To have the links with the icon open in a separate browser window, use the Ctrl + keys.

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



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

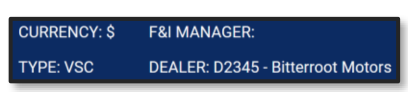


Return/Back: Returns you to the **Search Contract** screen.

Contract Number: The number of the Contract being viewed.

Contract Status: The Status of the Contract being viewed.

Contract Information: Displays Currency, F&I Manager (if applied), Coverage Type, and Dealer Number and Name.



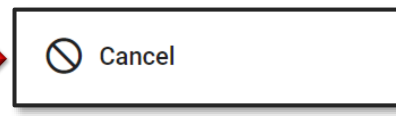
Documents: Provides the ability to attach documents to the Contract via upload or link.

A count of documents attached is displayed.

Print: Provides the option to Print the current Contract.

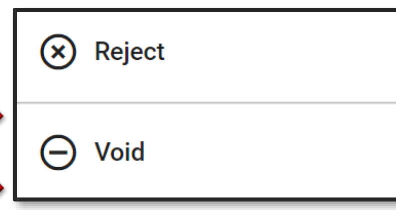
Action: Allows various options and status changes to be performed on an existing Contract. Click the **Action** button to display a list of options available. Current options available are:

Cancel Active Contract

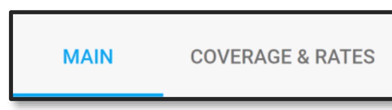


Reject Pending Contract

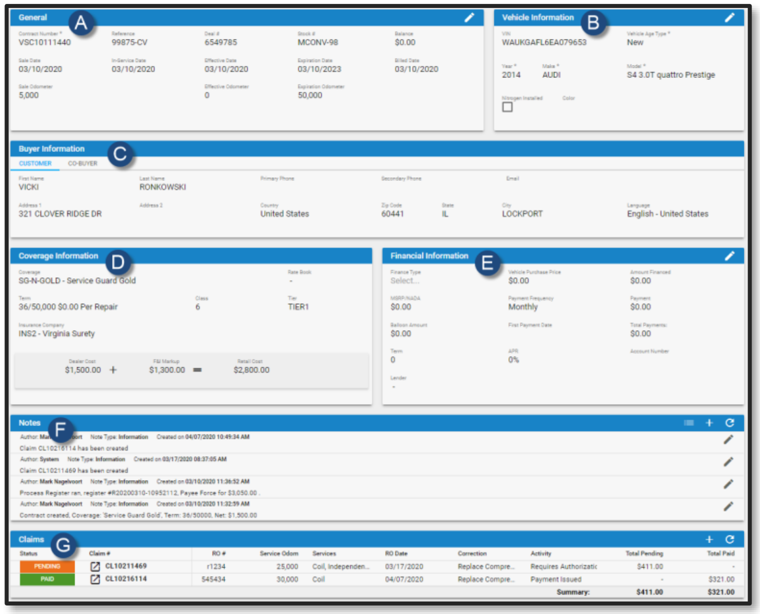
Void Pending Contract



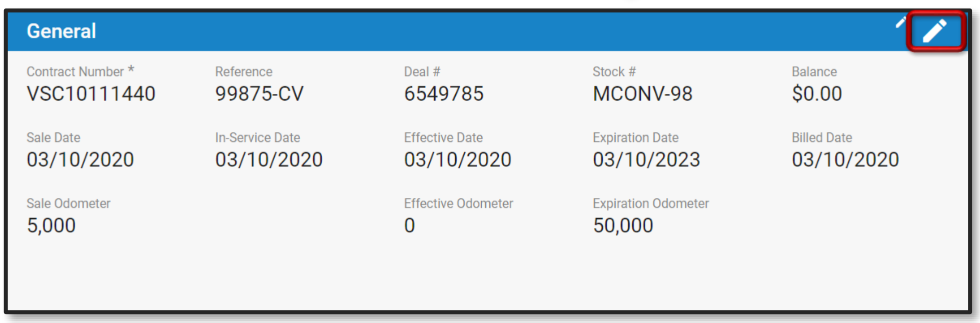
Main / Coverage Rates: Click to view the **Main Contract** information or **Coverage & Rates** to view Rate Details of the Contract. The current view will be displayed in **BLUE** text.



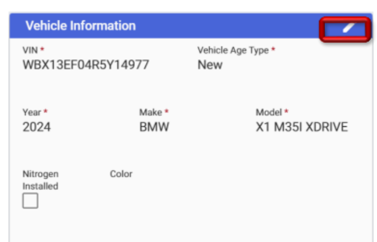
7. **Main Contract View:** The **Main Contract View** screen provides the ability to view and edit the selected Contract in a segmented view.



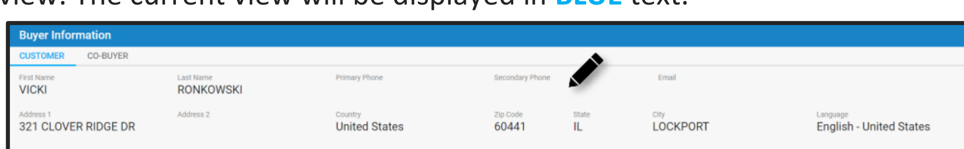
A. **General:** Provides the main details of the Contract being viewed. Edits can be performed by section, simply click the to open the section for edits.



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

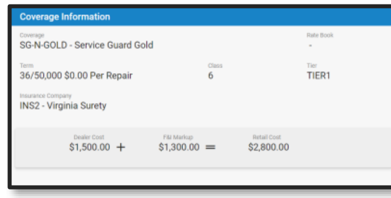


C. **Buyer Information:** Displays the Buyer and Co-Buyer information. Toggle between Buyer and Co-Buyer by clicking the **CUSTOMER** of **CO-BUYER** link view. The current view will be displayed in **BLUE** text.

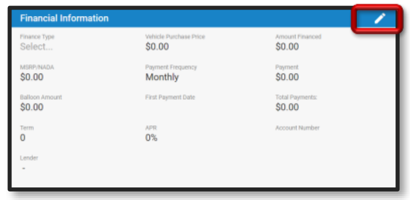


Edits can be performed by section. Click the to open the section for edits.

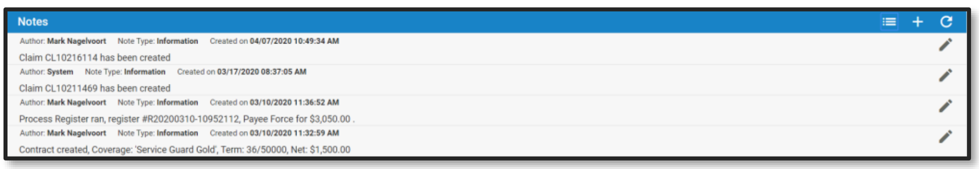
D. Coverage Information: Provides various details of the specific Contracted Coverage including high-level pricing.



E. Financial Information: Displays all Financial Information entered (and not entered) during the Contract creation process. Edits can be performed by section. Click the to open the section for edits.

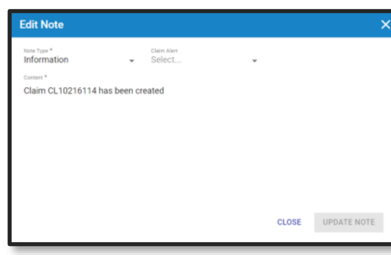


F. Notes: An interactive notes field is now displayed on the **Main Contract View** allowing you to preview note details as well as perform various additional functions.

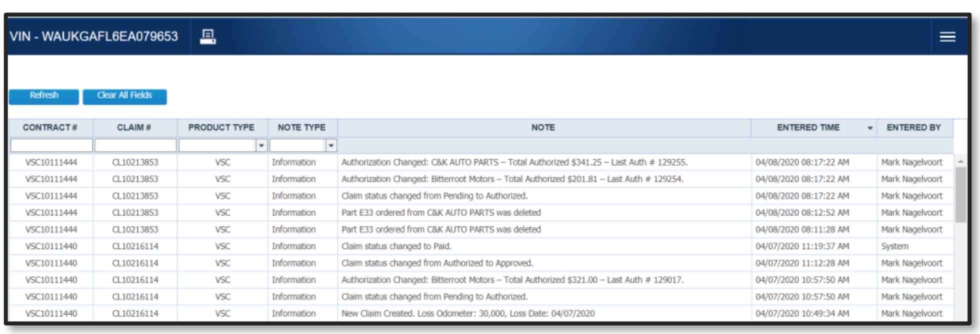


Edit/View Existing Note(s): Click the icon to view or edit an existing Note line.

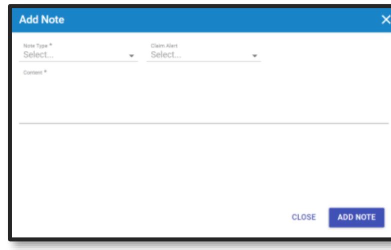
The ability to edit notes is controlled by User Permissions.



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**.

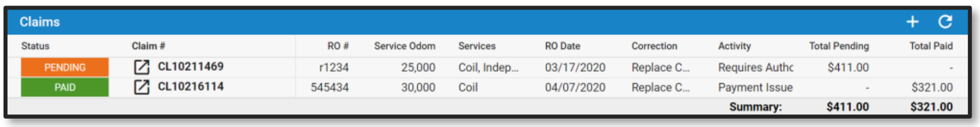


Add Note/Claim Alert: Add a new Note/Claim Alert by clicking the + button. Enter the desired Note or set the desired Claim Alert; click **ADD NOTE** to save and close.



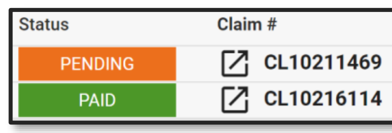
Refresh Notes View: You can refresh the notes preview window at any time by clicking the **Refresh** button.

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

Status	Claim #	RO #	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.

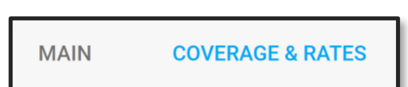
The **Add New Claim** screen will open in a new browser tab.

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**.

9. 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/Surcharges

Use	Name	Description	Cost
☐	Conditional Benefit - Engine Type	Conditional Benefit - Engine Type	$0.00
✓	Fuel Tank	Fuel Tank	$0.00
✓	Commercial Use	Commercial Use	$100.00
✓	Lift Kit	Lift Kit	$100.00
✓	4WD/AWD	4WD/AWD	$150.00
✓	ALL Wheel Drive	ALL Wheel Drive	$0.00
☐	Diesel	Diesel	$0.00
☐	Technology Package	Technology Package	$0.00
☐	Transmission	Transmission	$0.00
✓	Turbocharger	Turbocharger	$150.00

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

Rates Details

ADMIN

Code	Description	Rate Type	Written	Cancelled	Balance
BASEADMIN	Base Admin	Net Rate	$95.00	$0.00	$95.00
MARKETINGFEE	Marketing Fee	Net Rate	$5.00	$0.00	$5.00
NCBFEE	Dealer NCB Fee	Net Rate	$5.00	$0.00	$5.00
AGENT NCB	Agent NCB	Net Rate	$17.50	$0.00	$17.50
		Summary:	**$122.50**	**$0.00**	**$122.50**

RESERVES AND FEES

Code	Description	Rate Type	Written	Cancelled	Balance
BASERESERVE	Base Reserve	Net Rate	$440.00	$0.00	$440.00
SURCHARGE	Surcharge Reserve	Net Rate	$690.00	$0.00	$690.00
CLIP	CLIP	Net Rate	$65.00	$0.00	$65.00
PREMIUMTAX	Premium Tax	Net Rate	$2.50	$0.00	$2.50
		Summary:	**$1,197.50**	**$0.00**	**$1,197.50**

COMMISSION

Code	Description	Rate Type	Written	Cancelled	Balance
AGENTCOMM	Agent Commission	Net Rate	$140.00	$0.00	$140.00
DISCOUNT	Discount	Net Rate	$20.00	$0.00	$20.00
DEALERCOMM	Dealer Commission	Net Rate	$20.00	$0.00	$20.00
DLROVERREMIT	Dealer Overremit	Over Remit	$0.00	$0.00	$0.00
SUBAGENT	Agent Commission II	Net Rate	$0.00	$0.00	$0.00
		Summary:	**$180.00**	**$0.00**	**$180.00**

TOTAL

	Rate	Description	Written	Cancelled	Balance
	Net Rate	Admin + Reserves + Commission	$1,500.00	$0.00	$1,500.00
+	Over Remit		$0.00	$0.00	$0.00
=	Dealer Remit	Sum of remittance fields	$1,500.00	$0.00	$1,500.00
+	Calculated Dealer Pack		$0.00	$0.00	$0.00
=	Dealer Cost	Dealer Remit + Dealer Pack	$1,500.00	$0.00	$1,500.00
+	F&I Markup		$1,300.00	$0.00	$1,300.00
=	Retail	Dealer Cost + F&I Markup	$2,800.00	$0.00	$2,800.00

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

NOTES

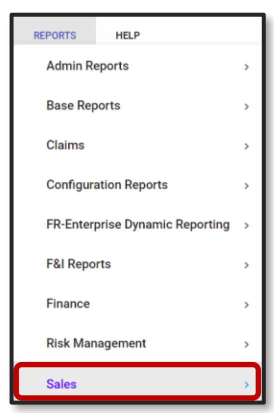
REPORTING

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.

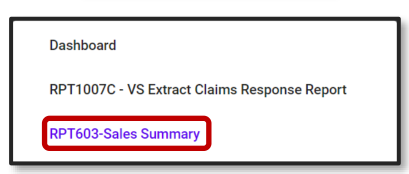
RPT603 - Sales Summary Report

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.

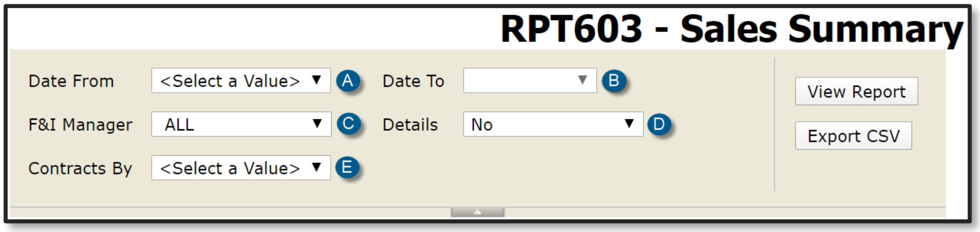
1. Click to expand the **REPORTS** quick link and scroll to the **SALES** section.



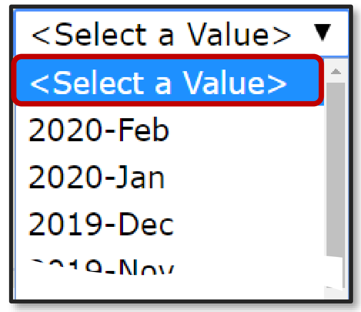
2. Click the **RPT603-Sales Summary** link to open the report.



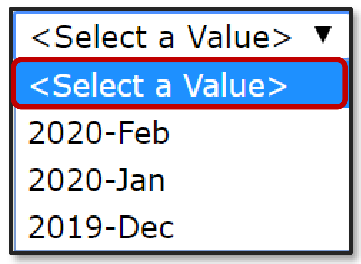
3. To view the report, specify the parameters you wish to display. All parameters need to be defined to view the report.



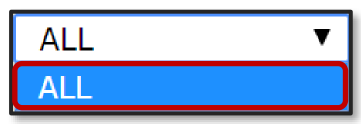
4. **Date From:** Select the start date of the date range you wish to report on. Report periods are monthly and beginning date will reflect the first day of the month selected.



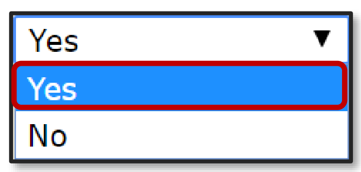
5. **Date To:** End date of the report date range. Selected date will reflect the last day of the month selected.



6. **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".

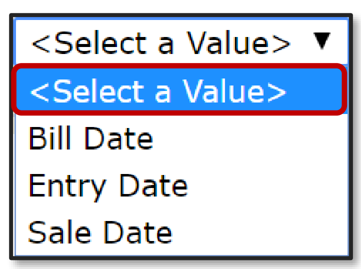


7. **Details:**
   Yes - will display Contract level detail supporting the summary level data.
   No - will display summary level data only.

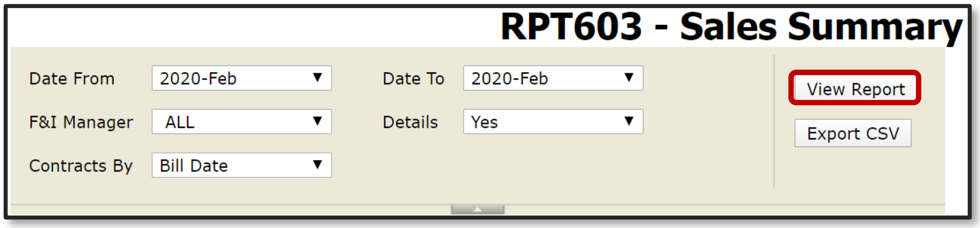


8. **Contracts By:**
   Bill Date* – Date the TPA received funds for the Contract.
   Entry Date – Date the Contract was entered into the PCRS system.
   Sale Date – Effective date of the Contract.

   ******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.

Account Balance Summary
12/1/2019 - 12/31/2019 Total

Report Group	Gross Contract Count	Dealer Net Rate	Retail
VSC	4	$3,410.00	$4,934.00
Total	4	$3,410.00	$4,934.00
		Up Front Profit	$1,524.00

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.

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

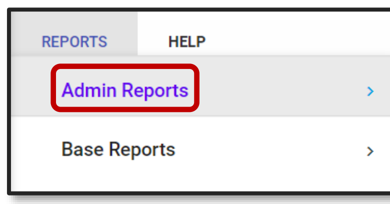
Row Number	Report Group Code	Tran Type	Contract Number	VIN	New / Used	Contract Sale Date	Customer Last Name	Coverage	Term/Deduct	Dealer Net Rate	Retail
1	VSC	NB	CPO89108721-1	5N1AZ2MH6GN108721	U	12/10/2019	Bayes	BRONZE	12/12/$100.00 Standard	$1,001.00	$1,011.00
2	VSC	NB	DEMOG10391PC	3TMJU62N27M036719	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

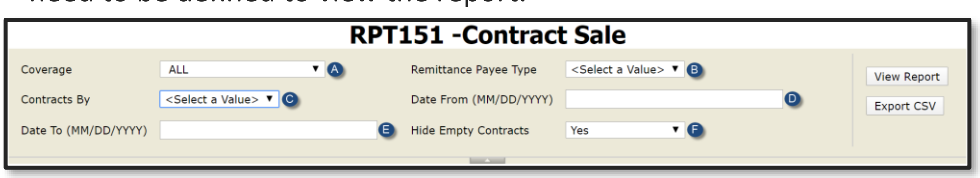
The **Contract Sale Report** provides all Contract sales within the given parameters sorted by dealer. Allows for reporting by a specific date range or by entire months.

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

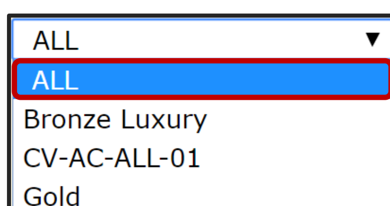


2. Click the **RPT151-Contract Sale** link to open the report.

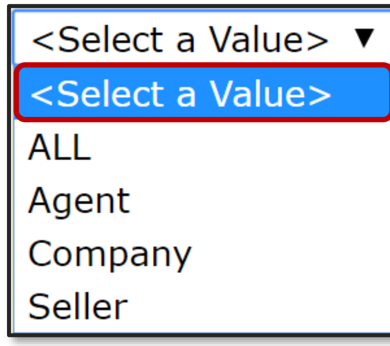
3. To view the report, specify the parameters you wish to display. All parameters need to be defined to view the report.



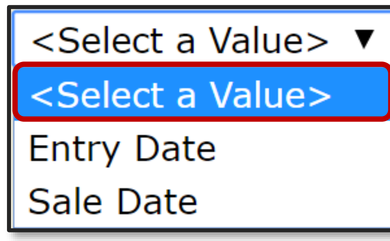
   A. **Coverage:** Select a specific Coverage *or* ALL to report on all Coverages sold.



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



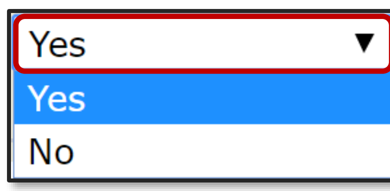
C. **Contracts By:** Select how you wish to report on your Contracts. This should follow the same method used for all Contract sales reporting.



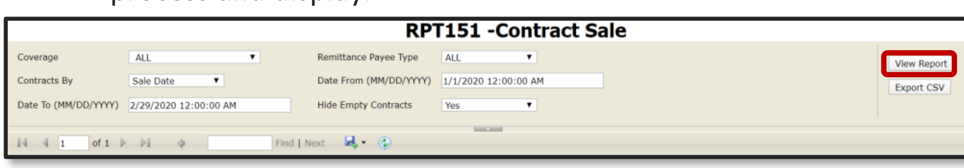
D. **Date From:** Enter the beginning date you wish to report on. The format must be MM/DD/YYYY as specified.

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.



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



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

RPT151 - Contract Sale 2020-Mar-06 10:27 AM

Your Technology Partner

Agent:	BOBAKS
Country:	United States
State:	IL-ILLINOIS
Dealer:	Randy's Autos
Report Period:	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 - 60613	1259888		02/20/2020		RANDY TESTING PPTW	Tire & Wheel 0 Months	1G4HA5EM7BU111466	2011 BUICK Lucerne CX	$276.00	$0.00
	SAMS18421PC		01/02/2020		RANDY PRICE	Bronze Luxury 0 Months	WMWWG5C50K3H08535	2019 MINI Convertible Cooper	$638.00	$638.00
	SAMS18422PC		01/02/2020		JOHN SMITH	Bronze Luxury 0 Months	WMWWG9C59K3J30911	2019 MINI Convertible Cooper S	$529.00	$529.00
	SAMS18424PC		01/03/2020		AMBER ATKINS	Bronze Luxury 0 Months	1FA6P8TH3G5219592	2016 FORD Mustang EcoBoost	$638.00	$638.00
	SAMS18425PC		01/03/2020		BECKY LEEMAN	Bronze Luxury 0 Months	1FA6P8CF9K5140614	2019 FORD Mustang GT	$515.00	$515.00
	SAMS18426PC		01/03/2020		JIMMY JOHNSON	Bronze Luxury 0 Months	1FATP8FF9K5121026	2019 FORD Mustang GT Premium	$638.00	$638.00
	SAMS18427PC		01/14/2020		TEST TEST	Bronze Luxury 0 Months	1FATP8FF9K5121026	2019 FORD Mustang GT Premium	$239.00	$239.00
	SAMS18432PC		02/04/2020		RANDY PRICE	BRONZE No Claims INS 0 Months	WMWWG9C59K3J30911	2019 MINI Convertible Cooper S	$55,721.66	$0.00
	SAMS18433PC		02/19/2020		RANDY PRICE	Bronze Luxury 0 Months	WMWWG9C59K3J30911	2019 MINI Convertible Cooper S	$239.00	$0.00
	TG10399014		01/23/2020		BOB SMITH	Tire & Wheel 0 Months	WMWWG9C59K3J30911	2019 MINI Convertible Cooper S	$272.00	$272.00
								Total For Randy's Autos	$59,705.66	$3,469.00

Confidential Data Page 1 of 1 Powered by PCMI, Corporation

> 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.

RPT200 - Sale Register Processed Report

1 of 1 Find | Next

RPT200 - Sale Register Processed Report 2020-Mar-09 10:07 AM

Dealer **Randy's Autos - RD720**

Payee **PCMI Company**
1030 HIGGINS RDPARK RIDGE, IL 60068

REGISTER		BANK	CHECK	
Register #	R20200309-10950266	Bank Name	Check Date	3/9/2020
Register Date	3/9/2020	Account Number	Check Number	
			Check Amount Due	$239.00

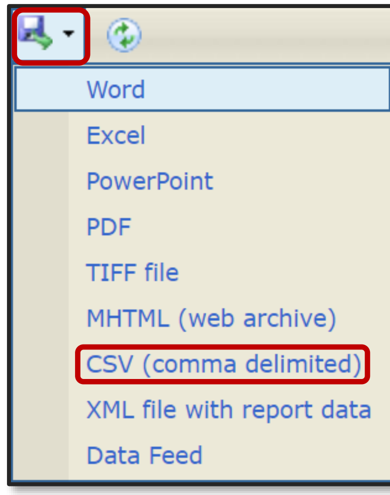
	Contract #	Stock #	Sale Date	Customer/ Product Name	Vehicle	Retail	Amount Due	Submitted	NET Cost	Dealer Cost	Tax1 - 15-20-23	Tax2 - 25-35-41	Total
1	SAMS18433PC		2/19/2020	RANDY PRICE Bronze Luxury	WMWWG9C59K3J30911 2019 MINI Convertible Cooper S	$900.00	$0.00	$239.00	$239.00	$239.00	$0.00	$0.00	$239.00
	Contracts Count:		**1**				**$0.00**	**$239.00**	**$239.00**	**$239.00**	**$0.00**	**$0.00**	**$239.00**

Confidential Data Page 1 of 1 Powered by PCMI, Corporation

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.



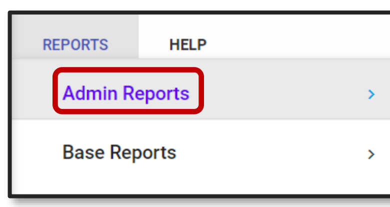
Contracts ***must*** be remitted via the Process Register for RPT200 – Sale Register Processed Report to display.

RPT905 – Dealer Billing Statement

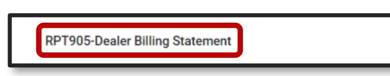
The **Dealer Billing Statement** is a core report which provides a full monthly summary of Contract billing activity. This serves as the main report which dealers refer to for a monthly summary of all billing activity.

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

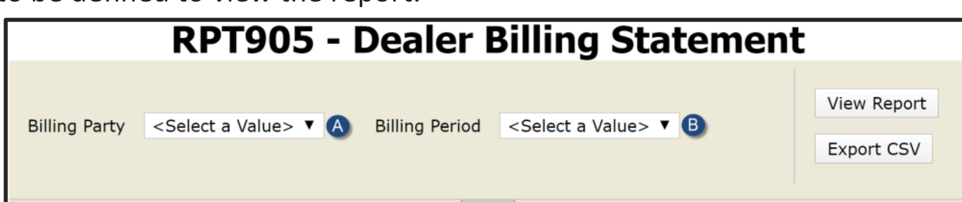
1. Click to expand the **REPORTS** quick link and scroll to the **ADMIN** section.



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

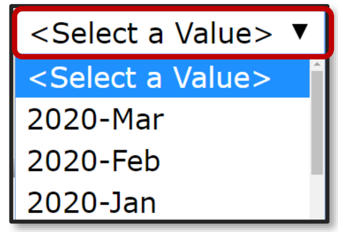


3. To view the report, specify the parameters you wish to display. All parameters need to be defined to view the report.

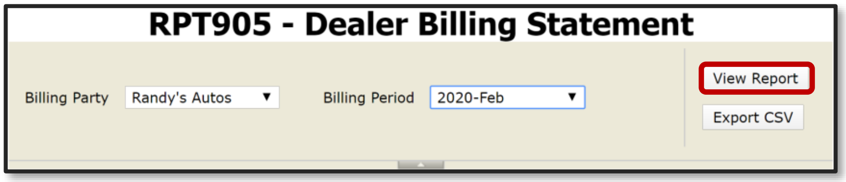


A. **Billing Party:** Select the Billing Party from the drop-down list.

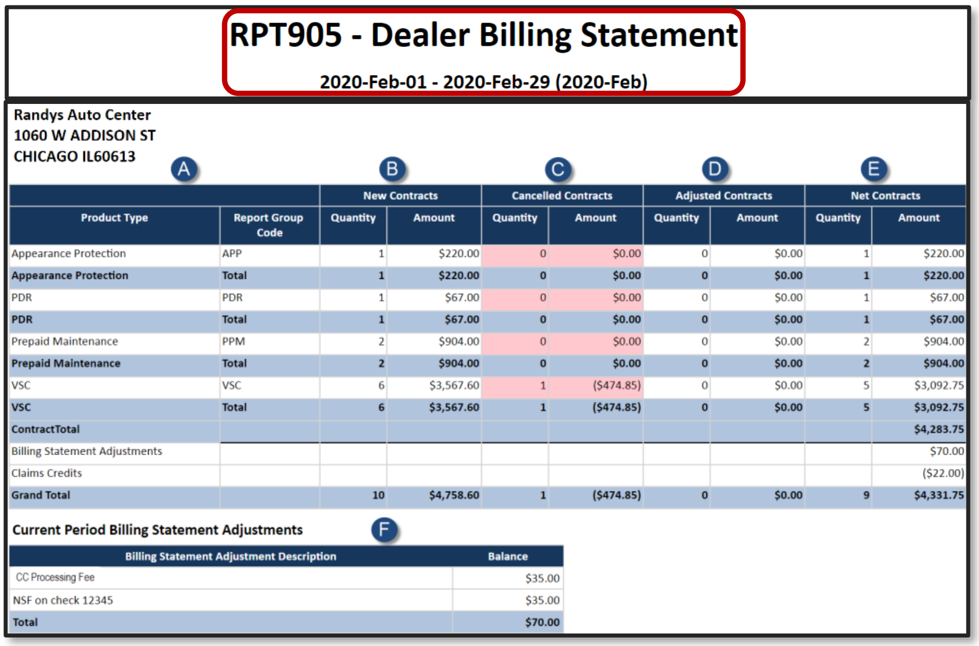
B. **Billing Period:** Select the month you wish to report for. This will include all days within the selected calendar month.



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



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



RPT905 - Dealer Billing Statement

2020-Feb-01 - 2020-Feb-29 (2020-Feb)

Randys Auto Center
1060 W ADDISON ST
CHICAGO IL60613

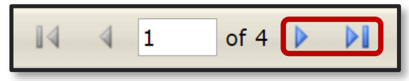
A		B		C		D		E	
		New Contracts		Cancelled Contracts		Adjusted Contracts		Net Contracts	
Product Type	Report Group Code	Quantity	Amount	Quantity	Amount	Quantity	Amount	Quantity	Amount
Appearance Protection	APP	1	$220.00	0	$0.00	0	$0.00	1	$220.00
Appearance Protection	**Total**	**1**	**$220.00**	**0**	**$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 Statement Adjustments F

Billing Statement Adjustment Description	Balance
CC Processing Fee	$35.00
NSF on check 12345	$35.00
Total	**$70.00**

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.

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 Claim Credits

Paid Date	RO Number	Claim #	Name	VIN	Coverage/ Report Group	Trans Type	Register #	Due	Applied	Balance
10/17/2019	R23456	CL10090470	LAURA JACKSON	1GKS2GKC8GR163993	FMM-CONV 3,000 PPM	CL		($22.00)	0	($22.00)
Total								**($22.00)**	**0**	**($22.00)**

8. **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.

Current Period New Business(NB) with Adjustment (Adj), Cancellation (C), Reinstatement (R) for New Business(NB)

Sale Date	Billing Date	Contract Number	Name	VIN	Coverage/ Report Group	Trans 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	1GYKNARS9HZ159041	CVP-PDR PDR	NB	R20191017-10837626	$67.00	$0.00	$67.00
9/24/2019	10/17/2019	PM10003120	BRIAN BARHAM	1GYKNARS9HZ159041	FMM-CONV 3,000 PPM	NB	R20191017-10837788	$483.00	$0.00	$483.00
10/17/2019	10/17/2019	PM10003204	GREG SMITH	1GYKNARS9HZ159041	FMM-CONV 3,000 PPM	NB	R20191017-10837626	$421.00	$0.00	$421.00
9/24/2019	10/11/2019	VSC10094407	BRIAN BARHAM	1GYKNARS9HZ159041	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.

Current Period Adjustment (Adj), Cancellation (C), Reinstatement (R) for Contracts Remitted in the Previous Period

Sale Date	Billing Date	Contract Number	Name	VIN	Coverage/ Report Group	Trans Type	Register #	Due	Applied	Balance
Total								**$0.00**		**$0.00**

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.

Current Period Adjustment (Adj), Cancellation (C), Reinstatement (R) for Contracts Remitted two (2) Previous Periods

Sale Date	Billing Date	Contract Number	Name	VIN	Coverage/ Report Group	Trans Type	Register #	Due	Applied	Balance
Total								**$0.00**		**$0.00**

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 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	C	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.

Pending Contracts - Not Registered (Process Sales Register to Remit)

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	1G1YY12SX15107022	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	
Total							**$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**	