

F&I Product Rating and Booking

ERA[®]



User Guide



Retail
Management
System

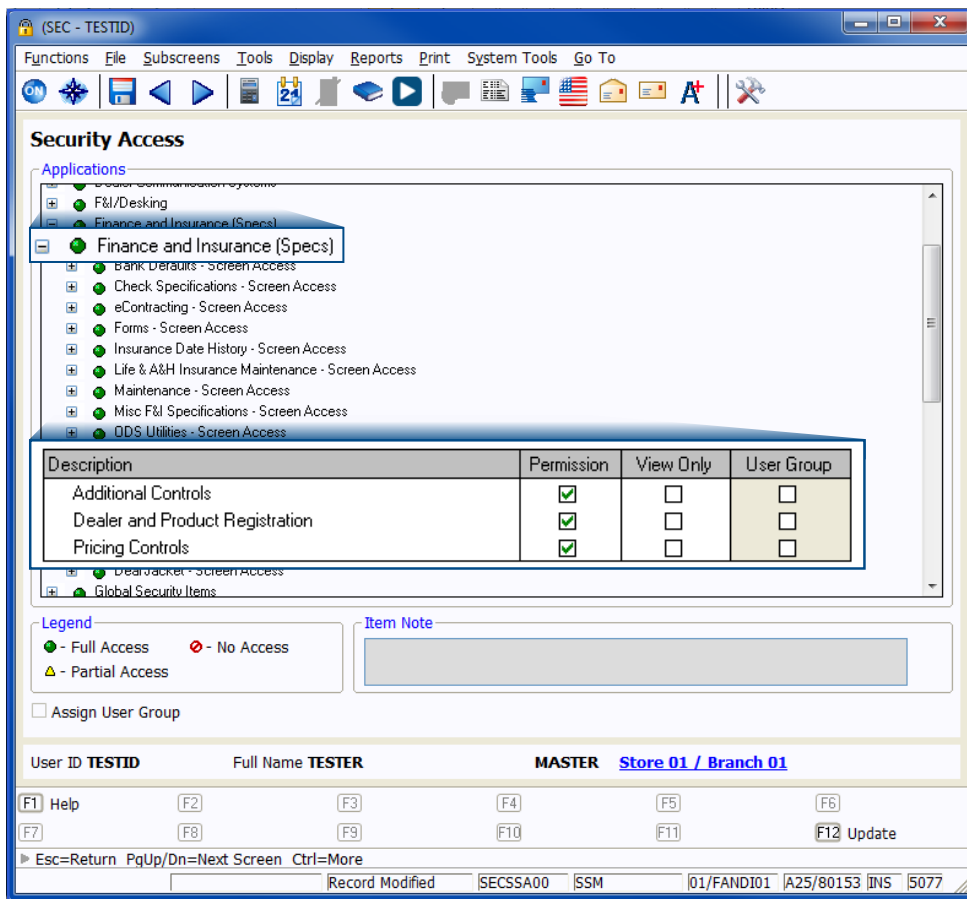
 Reynolds
& Reynolds[®]

Setup and Registration

Reynolds and Reynolds' F&I and F&I Menu software solutions include F&I product rating and F&I product booking. The F&I product rating feature gives you the ability to quickly access your providers' pricing for service contracts and aftermarket products in real time from both F&I and Menu software. The F&I product booking feature gives you the ability to transmit contract details to providers and receive completed F&I forms in return.

This guide describes how to register your dealership and your aftermarket providers and takes you through the specifications for the rating and booking features so you can customize them to fit your process. It also shows you how to rate and book your F&I products in a few simple steps.

You will need to have access to Finance and Insurance Specs to perform registration activities.



Finance and Insurance (Specs) → VSC Rating and Product – Screen Access

- Dealer and Product Registration
- Pricing Controls
- Additional Controls

To rate and book products you will need the following access:

F&I/Desking → Actions

Obtain VSC Rating

F&I/Desking → Actions

Book/Abid PEN Contracts

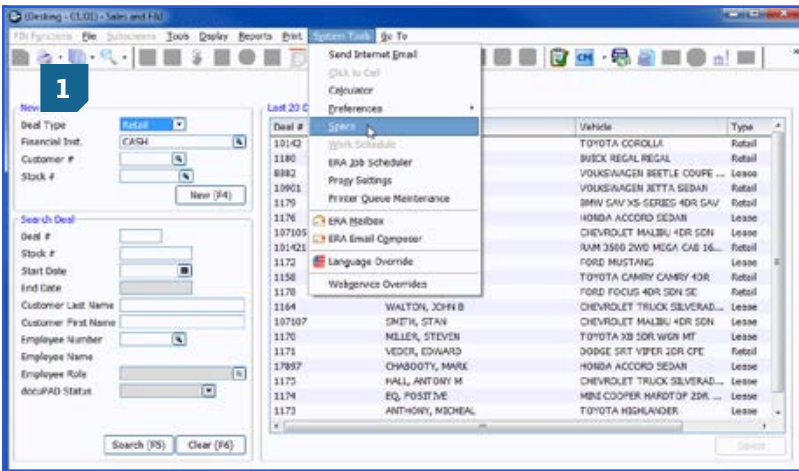
F&I/Desking → Screen Access

VSC Rating and Product Display

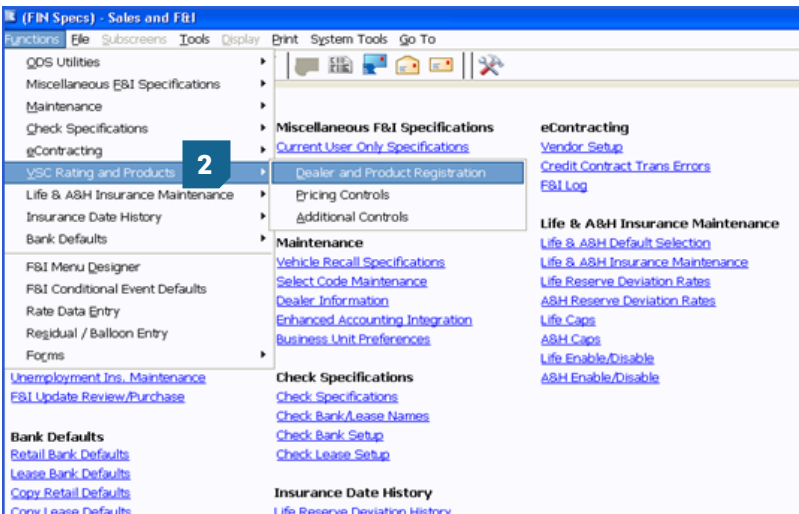
F&I/Desking → Aftersales – Fields

VSC Original Rating Cost
(optional)

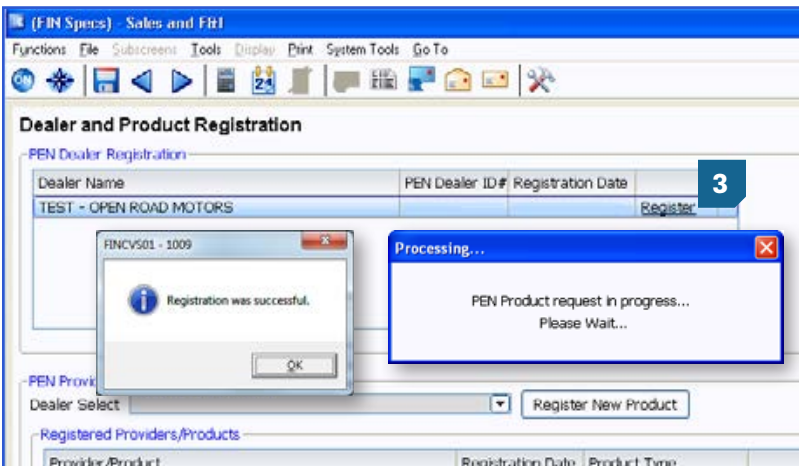
Step 1: Register your dealership



- 1 From the F&I/Desking main screen, click **System Tools > Specs**.



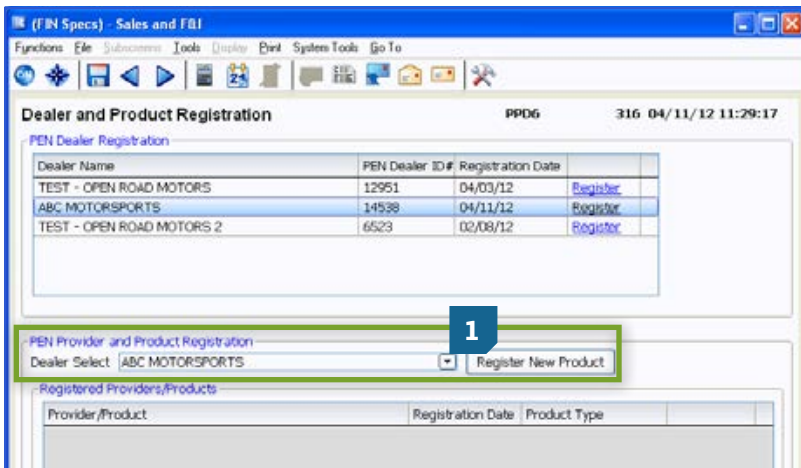
- 2 From the FIN Specs screen click **Functions > VSC Rating and Products > Dealer and Product Registration**.



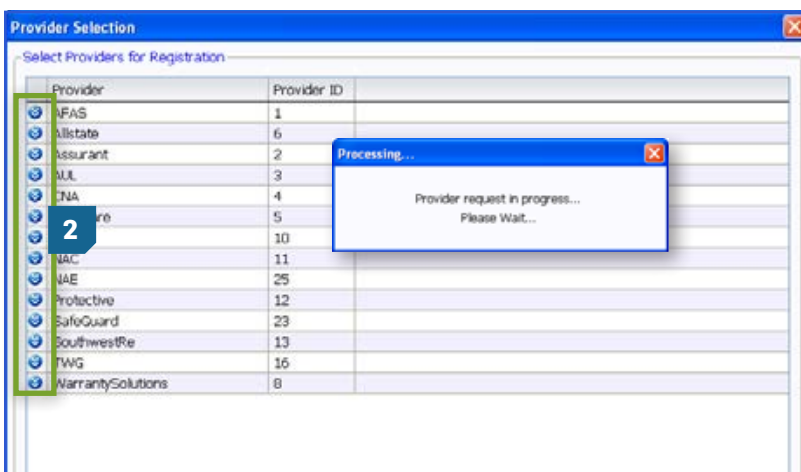
- 3 Click **Register** next to the Dealer Name. When the system is finished processing, a success notification will pop up.

Note: Your Dealer ID# will be assigned when you register; no manual entry required.

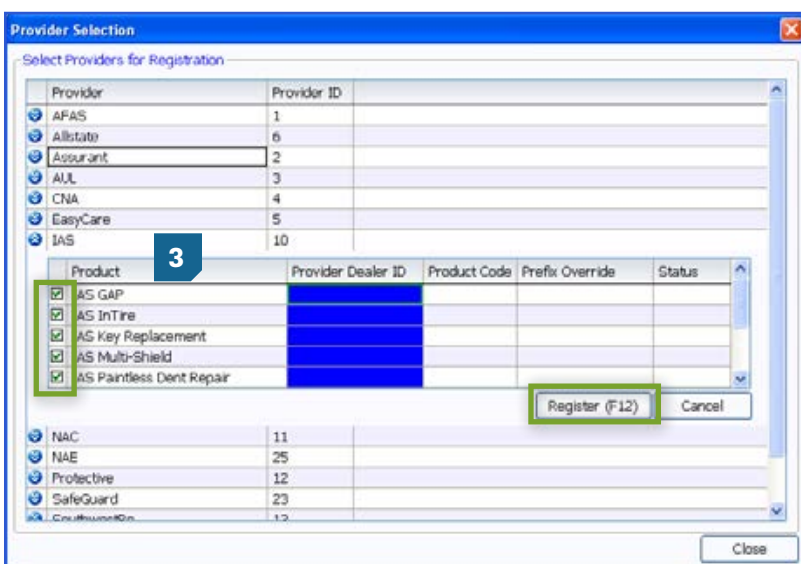
Step 2: Register providers and products



- 1 Use the down arrow next to Dealer Select to select dealership name. Click Register New Product.

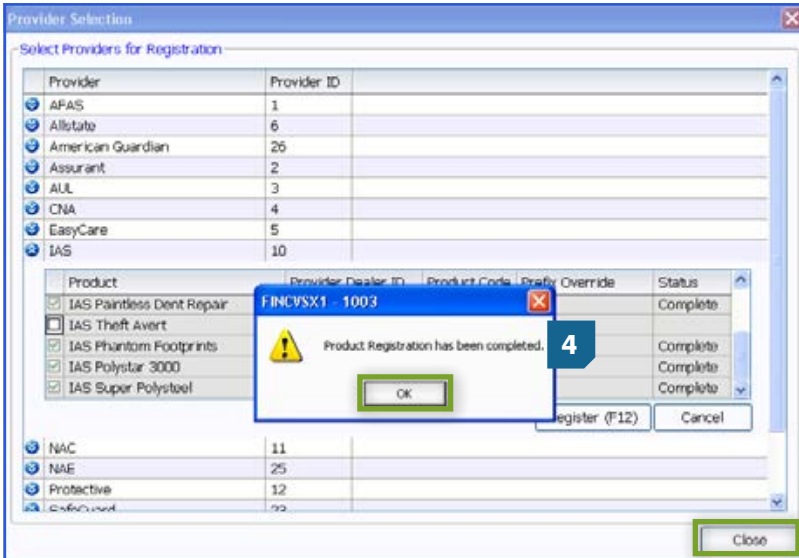


- 2 Click the double arrow on the left to choose products to register from providers with which your dealership has an existing relationship.

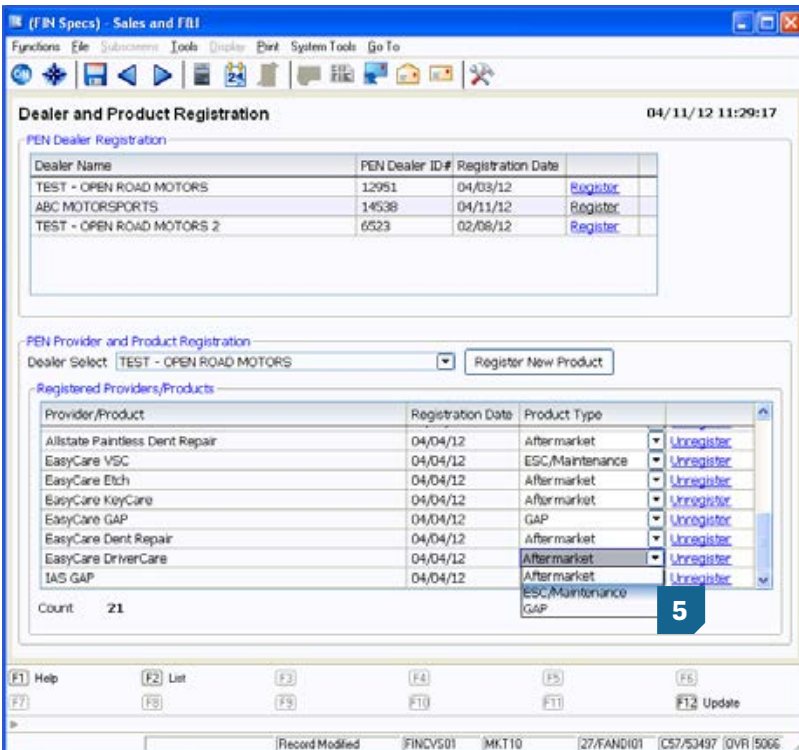


- 3 The products available for the provider will then display. Enter the Provider ID given to you by the provider next to the products you wish to register. Uncheck the boxes next to the products you do not want to register. Next, click Register (F12).

Note: The Provider Dealer ID is issued by your provider. If the provider requires a product code or prefix override, they will supply that to you as well. If you do not know your ID, you will need to contact your provider or provider agent.



4 You will receive a Registration Complete pop up box; click **OK**. Then click **Close** in the bottom right corner of the Provider Selection screen.



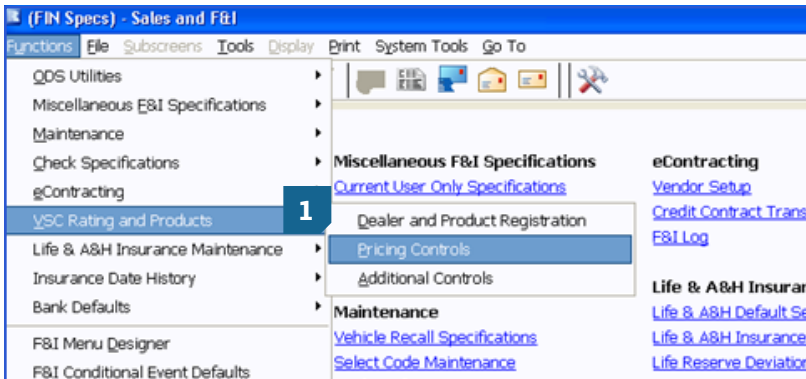
5 Select the Product Type by clicking on the drop down list next to each product that was registered.

IMPORTANT

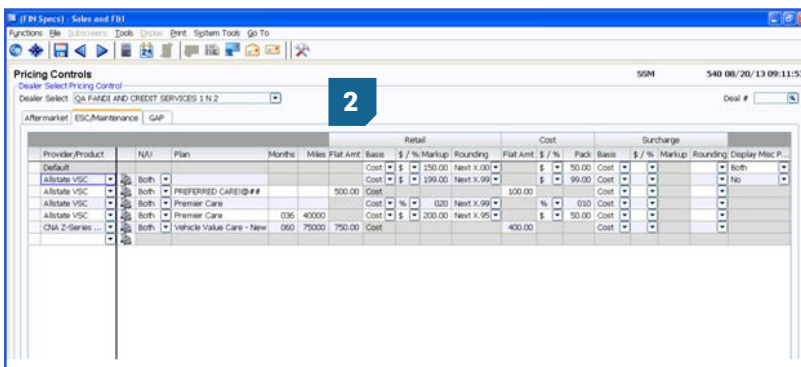
It is imperative that you contact your provider(s) for important information regarding their specific rating, booking, voiding, and remittance processes after you have successfully completed the registration process. Some providers require additional steps to be taken in order to properly rate, book, void, and remit contracts.

You can also contact Reynolds at 800.767.0080 for specific details.

Step 3: Set Product Integration Controls for pricing and profit information by product



- 1 From the FIN Specs screen click **Functions > VSC Rating and Products > Pricing Controls**.

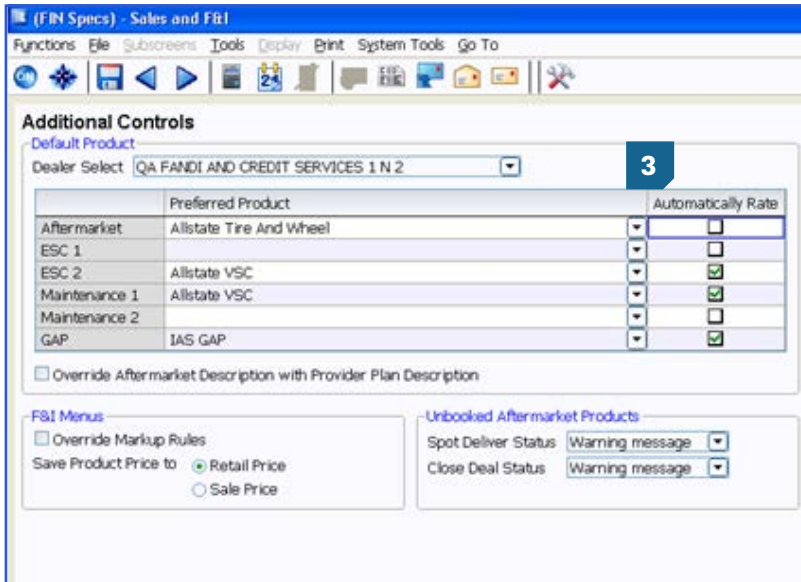


- 2 Define markup percentages or amounts by product type.

Dealer Select Pricing Controls

- Select the option of setting an overall default or itemizing per specific provider/product.
- It is possible to set certain parameters such as New/Used, Plan, Months, or Miles.
 - Note: Plan name has to be exactly as the rating would display
- Retail Price->
 - Flat Amt
 - Cost vs. List Basis
 - Markup based on % or \$
 - Rounding (ex. Next X.00 or Next X .99)
- Cost Pack % or \$
- Surcharge ->
 - Cost vs. List Basis
 - Markup based on % or \$
 - Rounding
- Display Misc Product Modal
 - Display Product Modal only on new, used, or both (ex. Business Use, Warranty Remaining)
 - Do not display the modal at all by

Note: Pricing Control specifications are set for each Dealer Select and also by Aftermarket, ESC, Maintenance, and GAP.



3 From FIN Specs screen, Click **Functions > VSC Rating and Products > Additional Controls**

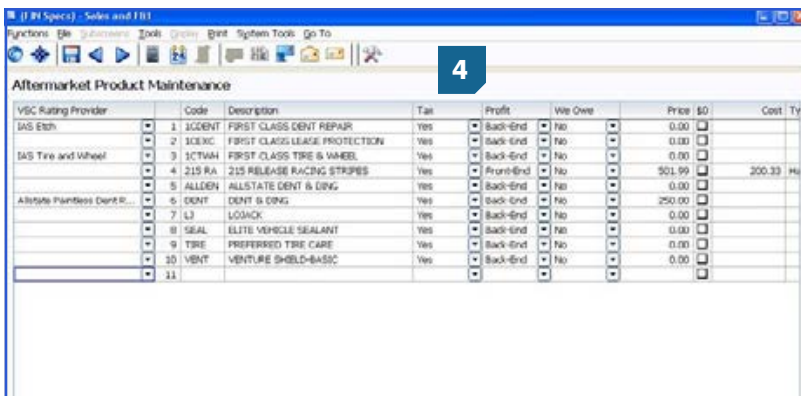
Default Product

- For each dealer select, select the default product you will see in the Product and Rating Request screen for each group.
- By checking the Automatically Rate box, it will force the pricing to pull within the Product and Rating Request screen without having to manually click 'Get Pricing'.

F&I Menus Controls

- Retail Price is the price before the Menus discount has been applied (if applicable).
- Sale Price is the price after the Menus discount has been applied (if applicable).
- Override Markup Rules → If this is not selected, the Menus markup rules are used. If this is selected, then those rules are overridden. As an example, if Menus has a \$200 markup limit, but the rated product is marked up \$500, you will want to override the Menus markup limit by checking this box.

Then choose Unbooked Aftermarket Product rules.



4 From the FIN specs screen, select Aftermarket Product Maintenance found under ODS Utilities. Registered provider(s)/ product(s) can be selected to default for each individual aftermarket code when rating.

Now you are ready to rate and book your products.

Rating and Booking

Product Rating

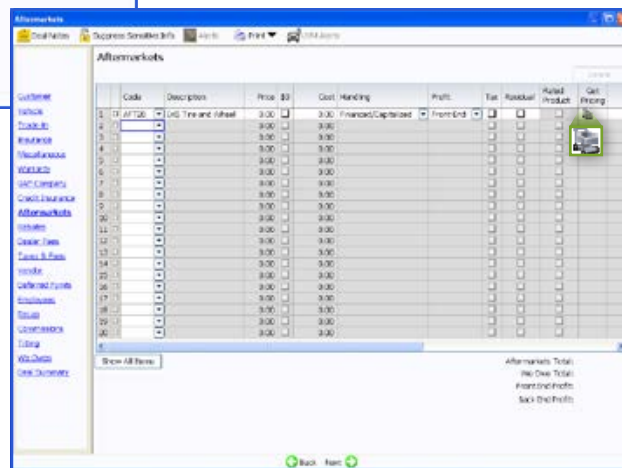
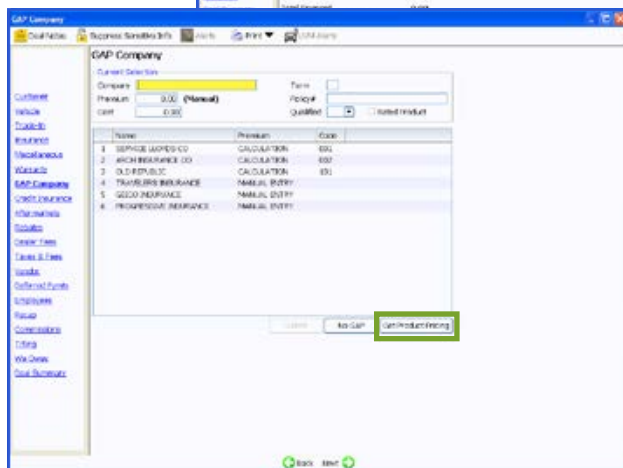
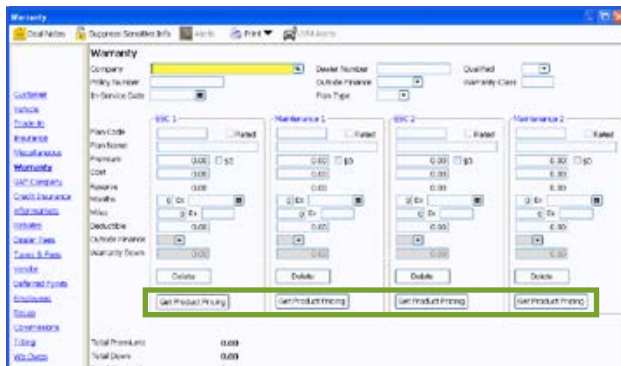
Rating from a deal record in ERA-IGNITE or Desking



Step 1: You can rate products from the Aftermarket, Warranty (ESC), and GAP subscreens or by clicking on the corresponding icons in the deal worksheet. Access the window in the **Subscreens** menu that corresponds to the product. For example, access the **GAP Company** window to rate a GAP insurance product, access the **Warranty** window to rate a service contract, or access the **Aftermarkets** window to rate an aftermarket item.

Note: VIN and Mileage are required to rate products.

Step 2: Click the **Get Product Pricing** button (on the Warranty or GAP Company window) or the **Shopping Cart** icon in the Get Pricing column (on the Aftermarkets window) to display the new Product and Rating Request window, where product pricing can be retrieved.



Product and Rating Request

Vehicle Information
 VIN: 3VW317A1D6M63256 Deal Date: 10/08/14 New/Used/Demo: New
 Vehicle Description: 2014 VOLKSWAGEN BEETLE COOPER 20T CPO 1.8T PZEV AT
 Odometer: 12 Rating 3r-Service Date: 10/08/2014
 Used Vehicles: Active Manufacturer Vehicle Warranty Original Owner

Product Information
 Product Type: A/Aftermarket Aftermarket Code: AFT2 Prompt Miscellaneous Product Option
 Provider/Product: JAS Tire and Wheel Use Retail Price in Deal

| Product | Deductible | Product Price | Surcharges | Price |
|---------|------------|---------------|------------|-------|
| | | | | |

Plan Name: Base Product Price: 0.00
 Form Number: Selected Surcharges: 0.00
 Total Product Price: 0.00

Provider Deductible Description
 * = deductible is reduced to the listed price
 ** = deductible is reduced to zero

Get Pricing (F5) Save Product (F12) Cancel

Step 3: In the Provider/Product field, select the provider and product to obtain pricing for. Use the dropdown arrow in this field to display registered providers. Then click **Get Pricing (F5)** to rate the selected product and display plans and pricing.

The padlock can be toggled on or off to display or hide cost and profit amounts.

Note: If **Automatically Pull Rating** was checked, the **Get Pricing** step would be skipped.

Miscellaneous Product Options

Surcharges

| Surcharges |
|--|
| <input type="checkbox"/> Chrome/Chrome Clad Wheels |
| <input type="checkbox"/> Non-Factory Tires/Wheels |

Miscellaneous

Rate Book Code:
 Lender Code:

OK (F12) Cancel

Step 4: If there are any surcharges that may apply, the Miscellaneous Product Options window will display. Select as necessary and click **OK (F12)**.

Product and Rating Request

Vehicle Information
 VIN: 3VW317A1D6M63256 Deal Date: 10/08/14 New/Used/Demo: New
 Vehicle Description: 2014 VOLKSWAGEN BEETLE COOPER 20T CPO 1.8T PZEV AT
 Odometer: 12 Rating 3r-Service Date: 10/08/2014
 Used Vehicles: Active Manufacturer Vehicle Warranty Original Owner

Product Information
 Product Type: A/Aftermarket Aftermarket Code: AFT2 Prompt Miscellaneous Product Option
 Provider/Product: JAS Tire and Wheel Use Retail Price in Deal

| Product | Deductible | Product Price | Surcharges | Price |
|---------|------------|---------------|------------|-------|
| | | | | |

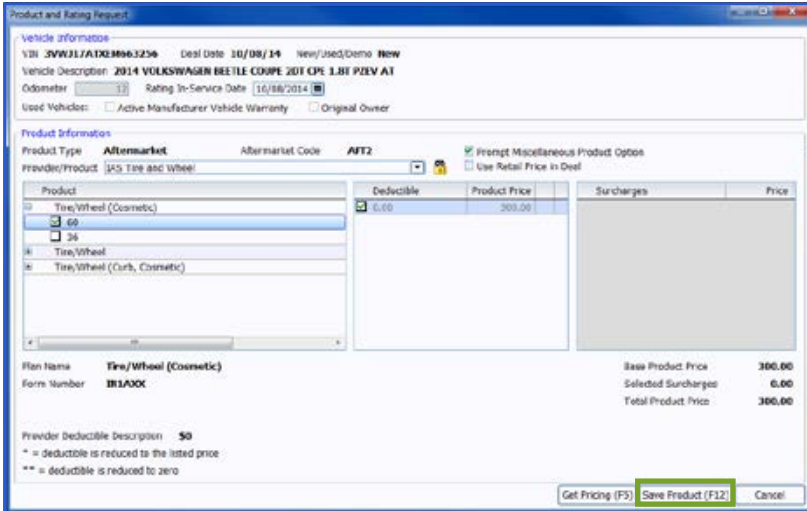
Plan Name: Base Product Price: 0.00
 Form Number: Selected Surcharges: 0.00
 Total Product Price: 0.00

Provider Deductible Description
 * = deductible is reduced to the listed price
 ** = deductible is reduced to zero

Get Pricing (F5) Save Product (F12) Cancel

Step 5: You can turn the prompts on or off for the miscellaneous product option using the checkbox labeled 'Prompt Miscellaneous Product Options'. Also, if a price is established in a deal but rating will still be necessary for cost, check the box for 'Use Retail Price in Deal.' When the product is saved back to deal, the retail price will not be altered but the correct cost/plan information will reflect for booking purposes.

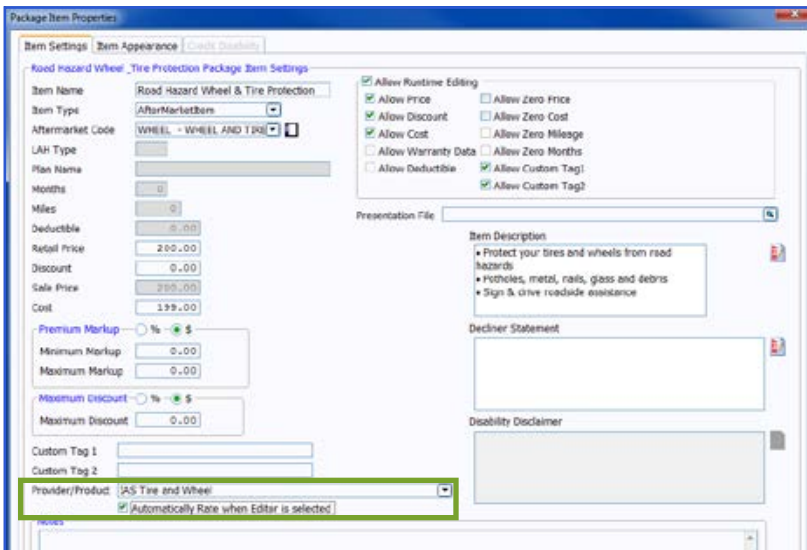
Note: If you choose to skip the **Misc Product Options** screen, selections can be missed that may result in improper ratings for certain providers/products.



Step 5: Select a product and plan by clicking the plus sign which displays available policies within that plan. Choose a policy by placing a check in the appropriate box and then choose a deductible. If any surcharges were returned, they will be listed in the surcharge box. Click Save Product (F12) to add the product to the deal. The deal record is automatically updated with the pricing information for the product. Details for the product are recorded on the Warranty, GAP Company, or Aftermarket window as appropriate.

Note: Changing certain details in the deal record, including the vehicle stock number and deal type, may require you to re-rate or rebook the product to reflect the changes.


Rating from F&I Menus presentations



F&I Menu Designer-Setups

Go to Tools > F&I Menu Designer

Within a menu, doubleclick a product to open Package Item Properties.

In Package Item Properties, you have the option to default a provider/product for that particular package item in the menu. You also have the option to check the box to Automatically Rate when the Editor button  is selected.

The screenshot displays the 'OPEN ROAD MOTORS' interface with four menu packages (OPTION 1-4) for a 2014 Volkswagen Beetle. Each package includes sections for GAP, Tire/Wheel Hazard Protection, Mechanical Protection Program, Value Guard, and Credit Life. The 'Editor' button for each package is highlighted with a green box. The interface also shows vehicle details, sale price, total fees, and financing options.

Step 1: Select a Menu package to rate by placing a checkmark in the appropriate box. Then click the Editor button next to a package item to enter the Editor window.

Note: To select the Editor button, the Allow Runtime Editing option must be checked in F&I Menu Designer > Package Item Settings.

The screenshot shows the 'Tire & Wheel Hazard Protection Editor' window. It contains the following fields: Aftermarket (AFTMKT 18), Aftermarket Code (AFT18), Retail Price (500.00), Discount (0.00), Sale Price (500.00), and Cost (210.00). There are also checkboxes for 'Apply to All Package Items', 'Custom Tag 1', and 'Custom Tag 2'. The 'Get Pricing (F5)' button is highlighted with a green box.

Step 2: Click Get Pricing (F5) to display the Product and Rating Request window, where the products can be rated.

The screenshot shows the 'Product and Rating Request' window. It displays vehicle information (VIN: 3VW177AD08663256, 2014 VOLKSWAGEN BEETLE COUPE 2DR CPE 1.8T PRIV AT) and product information (Product Type: Aftermarket, Product: Tire/Wheel (Chrome) [B1AAX]). A table shows the product price and surcharges. The 'Save Product (F12)' button is highlighted with a green box.

Step 3: After selecting the desired product and plan on the Product and Rating Request window, press **Save Product (F12)** to close the window and automatically enter the amounts for the selected product on the Editor window.

Step 4: Click **OK** to save the package item and return to the F&I Menus Designer window, where the package item

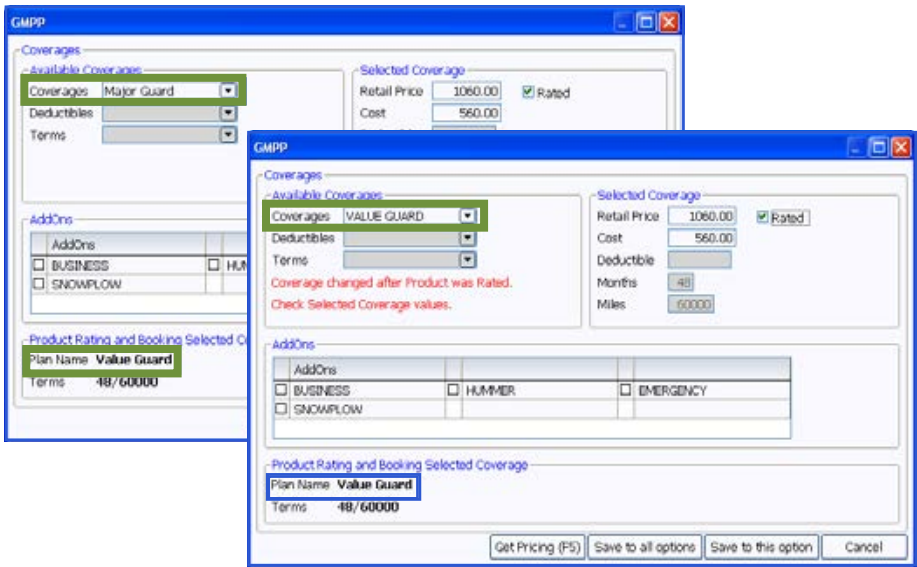
Rating from docuPAD – Customize Deal Menu

Step 1: Go to FIN Functions > Attach docuPAD Menu. When the docuPAD Menu Select screen opens, choose **Menu** and click **OK**. Within the Customize Deal Menu screen, click on **Select Coverage**.

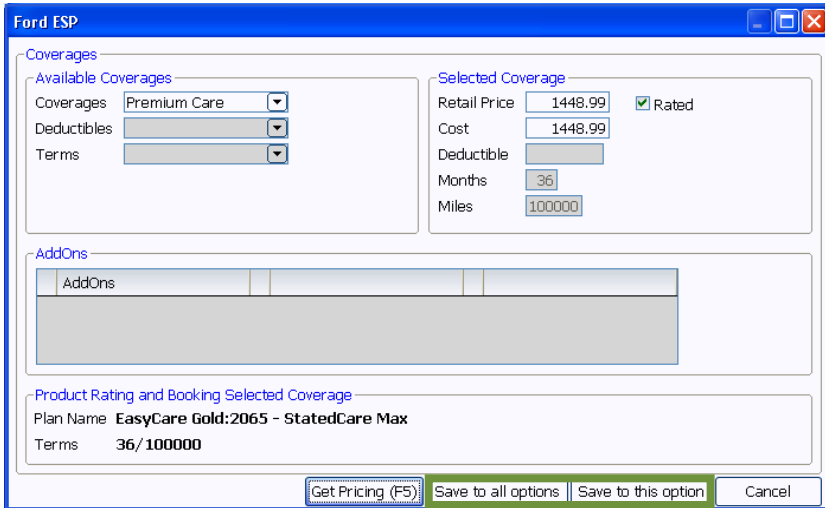
Step 2: Click **Get Pricing (F5)** to display the Product and Rating Request window, where the product can be rated.

Note: The system can be setup to default the provider/product as well as automatically rate when select coverage is selected. For assistance, please contact docuPAD support.

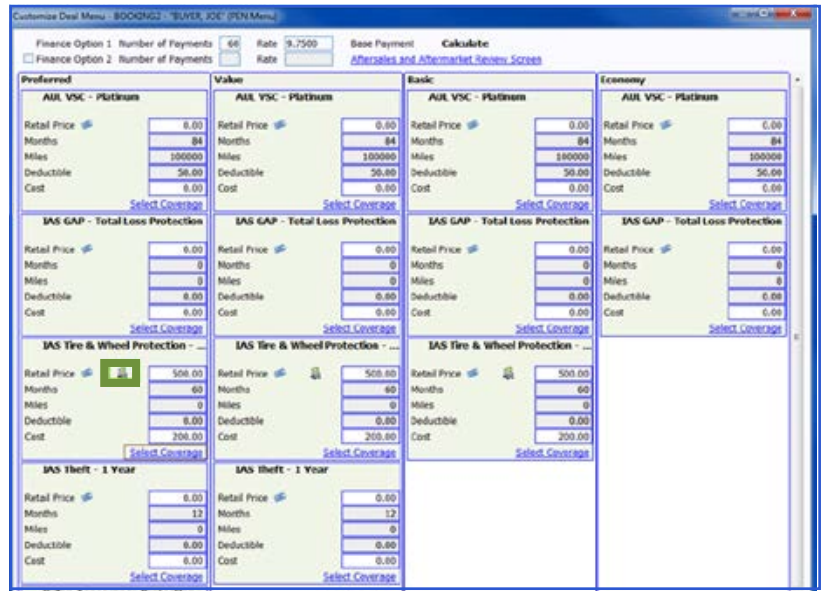
Step 3: After selecting the desired product and plan on the Product and Rating Request window, click **Save Product (F12)** to close the window and automatically enter the amounts for the selected product on the Coverage window.




Note: It is very important to verify that the coverage shown in the Available Coverages matches with the plan selected under Product Rating and Booking Selected Coverage. For example, Value Guard must be shown in both places.



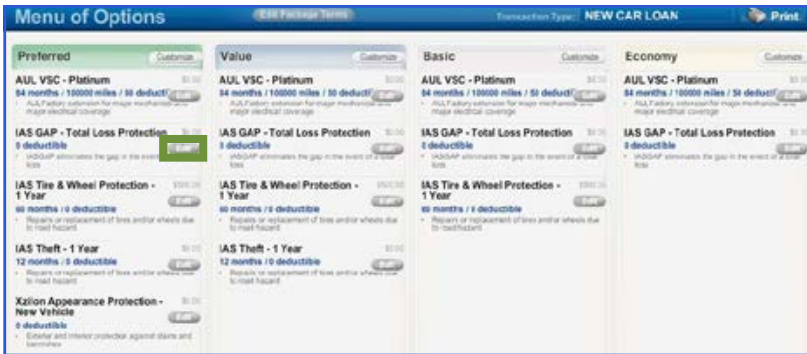
Step 4: Select Save to all options or Save to this option.



Step 5: Once all applicable products have been rated, select Ready for docuPAD (F8).

Note: The  icon will serve as an indicator that the pricing was obtained through Product Rating and Booking.

Rating from docuPAD – Menu of Options



Step 1: Flip the workstation screen so that the **Edit** product buttons are available. Click on the Edit button to open the Product Editor Window.



Step 2: Select **Get Product Rating** to open the Product Rating Request modal.



Step 3: Click **Get Pricing** to rate the product.

Product Rating Request

Odometer: 2 Rating In-Service Date: 06/06/14 NEW 2013 FORD FUSION 4DR SDN
 VIN: 3FA8P0H7809306995 Deal Date: 06/06/14

Active Manufacturer Vehicle Warranty (Used Vehicle)
 Original Owner (Used Vehicle)
 Prompt Miscellaneous Product Option Screen

IAS GAP

Product Information

Provider/Product: IAS GAP

Product: GAP 0-84 - GMAC/Ally Coverage: 999

| Deductible | Product Price | Surcharges | Price |
|--|---------------|------------|-------|
| <input checked="" type="checkbox"/> 0.00 | 219.00 | | |

Plan Name: GAP 0-84 - GMAC/Ally Base Product Price: \$219.00
 Form Number: 010MP Selected Surcharges: \$0.00
 Total Product Price: \$219.00

Provider Deductible Description: \$0
 * = deductible is reduced to the list price
 ** = deductible is reduced to zero

Step 4: Choose the appropriate product plan name and coverage from the dropdown lists and click **Save Product**.

Product Editor

PEN IAS GAP - [Total Loss Protection] 219.00
 Copy of BMGP (05/10)

Coverage: Total Loss Protection Rated

Term: Months: 60 Miss: 0

Deductible: 0.00

Product Rating Selected Coverage:
 Plan Name: GAP 0-84 - GMAC/Ally
 Term: 60

Step 5: Use either **Save to This Package** or **Save to All Packages** to save the product information and return to the Menu of Options screen.

Note: In the product editor window, **Rated** will display next to the coverage dropdown. The rating information displays in the bottom left of the window.



Product Booking and Printing

The screenshot shows the 'F&I Forms' window with a list of products. The 'Print Queue' section is visible, showing a list of items to be printed. Below the list, there are checkboxes for 'Select All Forms', 'Print All Impact/DP Forms as docuPAD', and 'Print All Pages'. There are also buttons for 'Print Dealer Copies' and 'Print Queue'.

| # | Dealer Description | Type | Status | Custom | Category | Preview | Void | Internal |
|----|-------------------------------|-----------|--------|--------|--------------------------|---------|------|-------------|
| 26 | DUE BILL/WE OWE (NO REV) | Impact/DP | | | MISCELLANEOUS | Preview | | |
| 51 | ETHOS GAP ADDENDUM (NO REV) | docuPAD | | | GAP INSURANCE | Preview | | |
| 6 | LAW 228RS ATPI (01/00) | Impact/DP | | | AGREEMENT TO PROVIDE ... | Preview | | |
| 22 | LAW 228RS ATPI (01/00) | Impact/DP | | | AGREEMENT TO PROVIDE ... | Preview | | |
| 23 | LAW 228RS ATPI (01/00)WDP | docuPAD | | | AGREEMENT TO PROVIDE ... | Preview | | |
| 7 | LAW 553 ARB-CA EPS (07/12) DP | docuPAD | | | RETAIL CONTRACT | Preview | | |
| 26 | LAW 553 ARB-CA EPS14 (07/12) | docuPAD | | | RETAIL CONTRACT | Preview | | |
| 29 | LAW 553 ARB-CA EPS14 (07/12)W | docuPAD | | | RETAIL CONTRACT | Preview | | |
| 12 | LAWCA 177 NTC (04/12) | Impact/DP | | | MISCELLANEOUS | Preview | | |
| 16 | LAWCA 177 NTC (04/12)WDP | docuPAD | | | MISCELLANEOUS | Preview | | |
| 25 | LAWCA CONT CARB AG (04/12) | Impact/DP | | | MISCELLANEOUS | Preview | | |
| 27 | LAWCA FRE CONT DISC (07/12) | Impact/DP | | | MISCELLANEOUS | Preview | | |
| 24 | LAWCA USED VEH DISC (04/12) | Impact/DP | | | MISCELLANEOUS | Preview | | |
| 32 | LAWCA-EMAGDISC N (04/12) | Impact/DP | | | MISCELLANEOUS | Preview | | |
| 18 | LOJACK ACCEPT FORM (02/11) | docuPAD | | | AFTERMARKET | Preview | | |
| 20 | MINI GAP PROTECTION (05/10) | Impact/DP | | | GAP INSURANCE | Preview | | |
| 19 | MINI TIRE & WHEEL AG (05/09) | docuPAD | | | AFTERMARKET | Preview | | |
| 48 | NISSAN SEC + EPP (05/12) | Impact/DP | | | ESC / WARRANTY | Preview | | |
| 8 | PWR MAPPING DOC (NO REV) | docuPAD | | | INTERNAL | Preview | | Send to DPS |
| 13 | SAFE-GUARD BMW ETW (07/12) | Impact/DP | | | AFTERMARKET | Preview | | |
| 14 | SAFE-GUARD MINI ETW (07/12) | Impact/DP | | | GAP INSURANCE | Preview | | |
| 46 | SEQUOIA MAINTENANCE (07/13) | docuPAD | | | ESC / WARRANTY | Preview | | |

Once a product is added to a deal, you can book the contract from the F&I Forms window, accessed by selecting **Print > F&I Forms**. On this window, simply select the product to book in the Aftermarket Product Booking and Reprint section and click **Book Contract (F9)**.

A contract number assigned by the provider is automatically entered in the Contract # column and the status is changed to Booked.

Note: When “Sign on docuPAD” is checked, the PDF will load to the docuPAD workstation Forms & Documents screen where it can be signed electronically. If this is not selected, the completed contract will automatically display in a separate window to be printed and processed as usual.

The screenshot shows the 'Additional Fields for Contract Booking' dialog box. It has a table with 'Additional Fields' and 'Enter Additional Data' columns. There are three rows with dropdown menus for 'Enter the Deal Type', 'Enter the Deals Monthly Payment', and 'Enter the Vehicles Status (New, Used, etc.)'. There are 'OK (12)' and 'Cancel' buttons at the bottom.

| Additional Fields | Enter Additional Data |
|---|-----------------------|
| Enter the Deal Type | |
| Enter the Deals Monthly Payment | |
| Enter the Vehicles Status (New, Used, etc.) | |

If there is any missing information required to properly book a product, the Additional Fields screen will prompt you to enter the necessary info. This screen is meant to capture required info that may be missing, as specified by the provider, so forms will be filled out correctly. It also ensures that providers have all necessary info to properly service the customer.

Once booked, the completed contract form automatically displays in a separate window in .pdf format. Information for the buyer, vehicle, and product is automatically entered on the form. You can then print the form for the buyer to sign, and process it as usual. Repeat this step for each contract you wish to book.

VSC Rating and Products Display

| Provider/Product | Plan/Product | Rating Price | Rating Cost | Deal Price | Deal Cost | Contract# |
|------------------------------|----------------------------|--------------|-------------|------------|-----------|-----------|
| IAS Tire and Wheel | Tire/Wheel (Cosmetic) | 500.00 | 200.00 | 500.00 | 200.00 | 334579 |
| IAS Etch | Theft 5000 (T500X) | 286.50 | 86.50 | 286.50 | 86.50 | 334580 |
| Xzilon Appearance Protection | EVO B Basic - New (EVO-... | 278.95 | 78.95 | 278.95 | 78.95 | |

Product Type **Option** Aftermarket Code

Original Rating Price (No Markup) Original Rating Cost (No Pack) **129.00**

Date Saved **06/06/14 07:39:45** Date Booked **06/06/14 07:45:32** Date Voided

Book Contract Void Contract Close

You can also book contracts by selecting **Display > VSC Rating and Products**. The VSC Rating and Products Display window displays a list of the rated products on the deal.

Note: If the label “Rating Only” displays for the provider on this window, the product must be booked with the provider outside of the Sales and F&I application.

Voiding a Contract and Reprinting Forms

VSC Rating and Products Display

| Provider/Product | Plan/Product | Rating Price | Rating Cost | Deal Price | Deal Cost | Contract# |
|------------------------------|----------------------------|--------------|-------------|------------|-----------|-----------|
| IAS Tire and Wheel | Tire/Wheel (Cosmetic) | 500.00 | 200.00 | 500.00 | 200.00 | 334579 |
| IAS Etch | Theft 5000 (T500X) | 286.50 | 86.50 | 286.50 | 86.50 | 334580 |
| Xzilon Appearance Protection | EVO B Basic - New (EVO-... | 278.95 | 78.95 | 278.95 | 78.95 | |

Product Type **Option** Aftermarket Code

Original Rating Price (No Markup) Original Rating Cost (No Pack) **129.00**

Date Saved **06/06/14 07:39:45** Date Booked **06/06/14 07:45:32** Date Voided

Reprint Contract Void Contract Close

If a buyer changes their mind about a product, you can easily void the contract directly from the VSC Rating and Products Display window by highlighting the product and clicking **Void Contract**.

Note: Contact providers directly for specific guidelines regarding voiding contracts.


You can reprint forms by highlighting the product and clicking **Reprint Contract**.

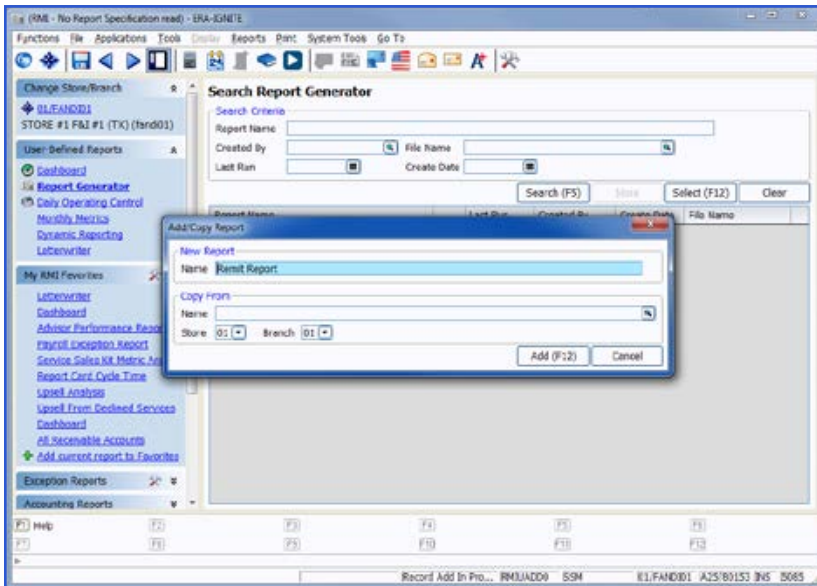
IMPORTANT

Remember to contact your provider(s) about their specific processes as some providers require additional steps to be taken in order to properly void contracts.

Build a Remittance Report

A Remittance Report can be built within the ERA-IGNITE Retail Management Intelligence (RMI) application. This report will show the contracts booked as well as the actual contract numbers. To build this report, complete the following steps.

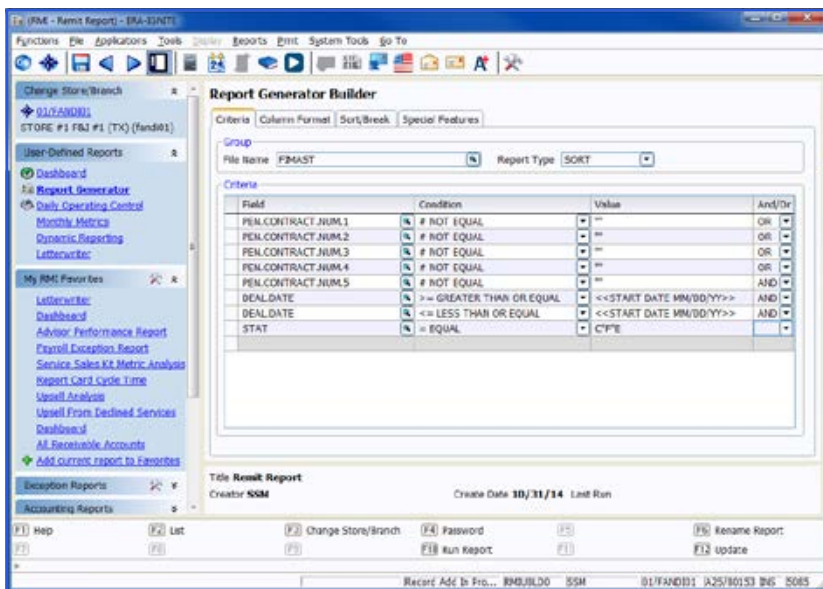
Step 1: Open the Retail Management Intelligence Application found under My Applications on the ERA-IGNITE homepage by simply clicking the  icon found on your toolbar.



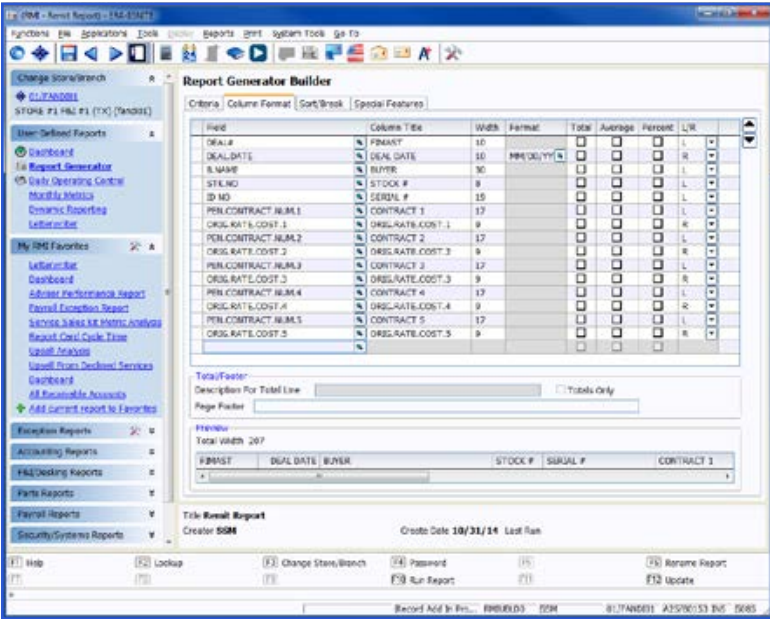
Step 2: Go to the Applications > Report Generator. Once the Search screen appears, select F9 to Add New.

Note: You will need to be in the F&I store and branch where the remittance report is required.

Step 3: Name the report “Remit Report” and press **Add (F12)**.

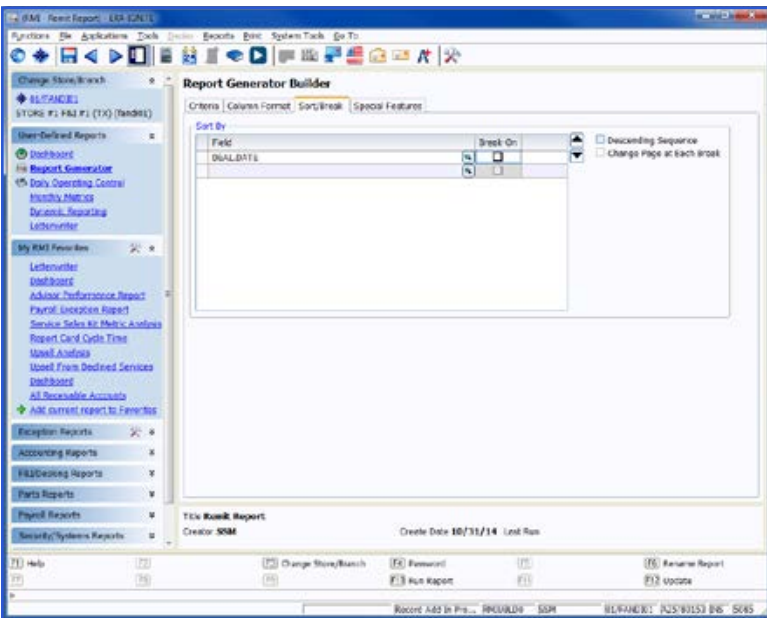


Step 4: Select the following Criteria.



Step 5: Select the following Column Format.

Note: You can add other columns you would like to pull, such as **MAKE**.



Step 6: Select the following Sort/Break.

Step 7: Save the report by selecting **Update (F12)**.

Step 8: Run the Report by selecting **Run Report (F10)**.

For assistance with report modification or information on
how to rate and book your products,
call **800.767.0080**.

To view a detailed list of integrated providers, please visit:
<http://www.reyrey.com/rpp>.



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