

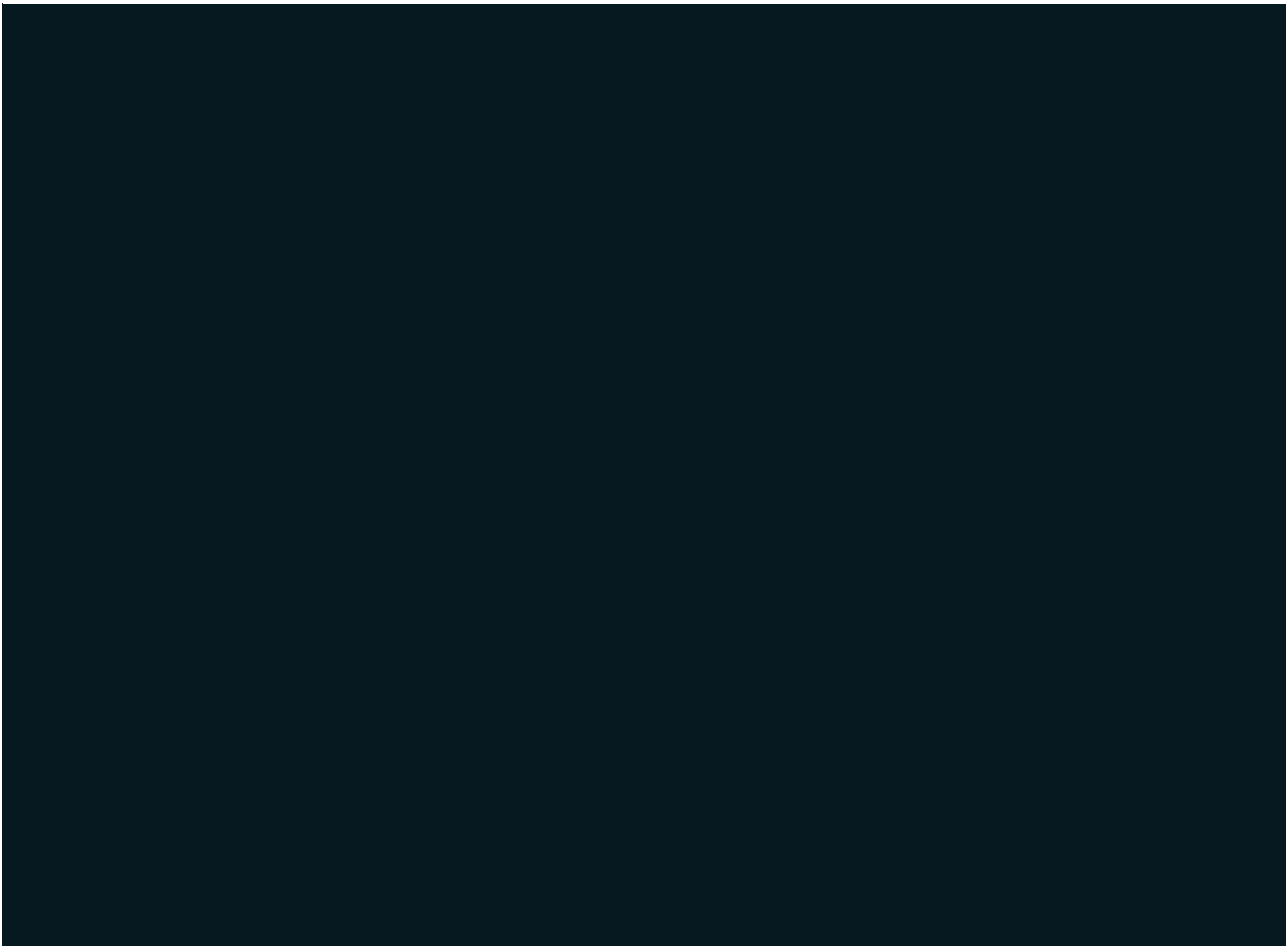


WARRANTY SOLUTIONS®

AN AMYNTA COMPANY

PCRS+ TRAINING GUIDE

Add a Contract



LEGEND

As you navigate this guide, you will come across several icons that signify general, important, and critical information. These icons are specifically designed to draw your attention to essential details related to the tasks you are performing within the PCRS+ system. Below is a legend explaining the icons and their significance.



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



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



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



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

Introduction

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

This guide will cover:

- Add a Contract

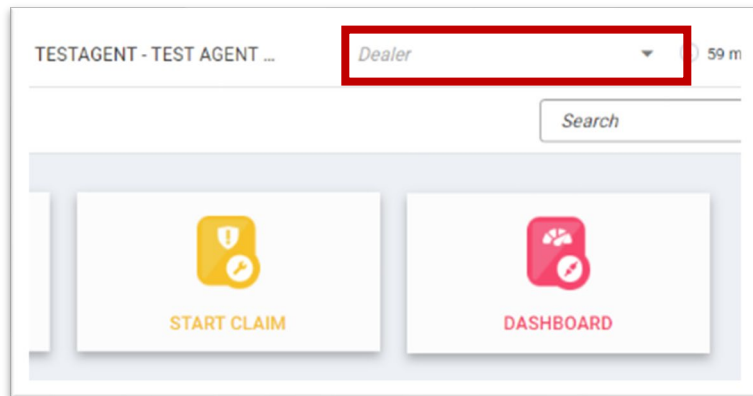
Disclaimer

This guide is created by and specific to the Warranty Solutions Program. All numbers are for demonstration purposes only. Portions of this training are from PCMI Corporation's PCRS software. All rights reserved.

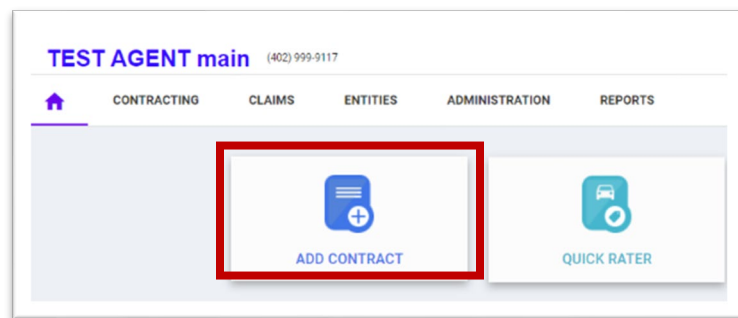
Add a Contract

The Add a Contract function allows you to view all eligible products, rate electronically, and create vehicle contracts.

1. From the PCRS Home screen, select the dealer you want to add a contract.



2. Select **ADD CONTRACT** to open the deal setup screen and begin adding a contract.



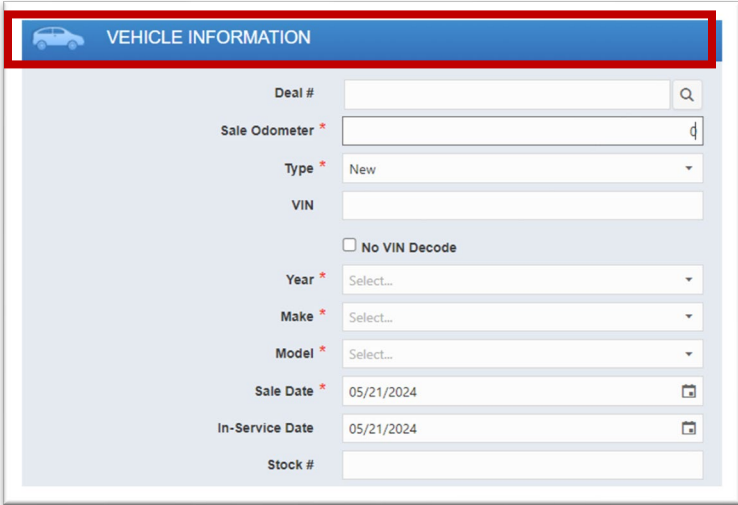
If the Add Contract screen does not appear, be sure you have 'allow pop-ups from this site' enabled in your browser.

3. On the left side of the screen, enter the **Vehicle Information**.

Enter the Year, Make, and Model, as required, or you can enter the VIN, and it will decode the 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.

If VIN is entered, skip to step 6.

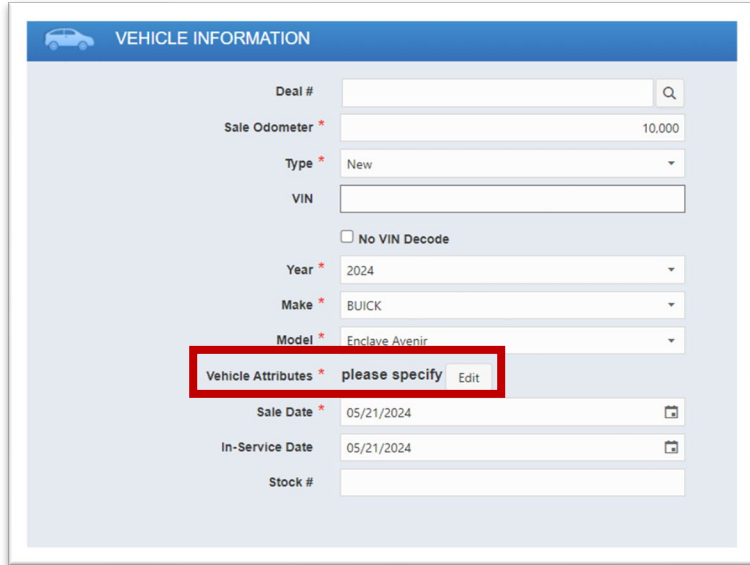


The screenshot shows the 'VEHICLE INFORMATION' form. The title bar at the top is blue with a car icon and the text 'VEHICLE INFORMATION', and it is highlighted with a red rectangular box. Below the title bar are several input fields: 'Deal #' (with a search icon), 'Sale Odometer *', 'Type *' (set to 'New'), 'VIN', a checkbox for 'No VIN Decode', 'Year *' (set to 'Select...'), 'Make *' (set to 'Select...'), 'Model *' (set to 'Select...'), 'Sale Date *' (set to '05/21/2024'), 'In-Service Date' (set to '05/21/2024'), and 'Stock #'.



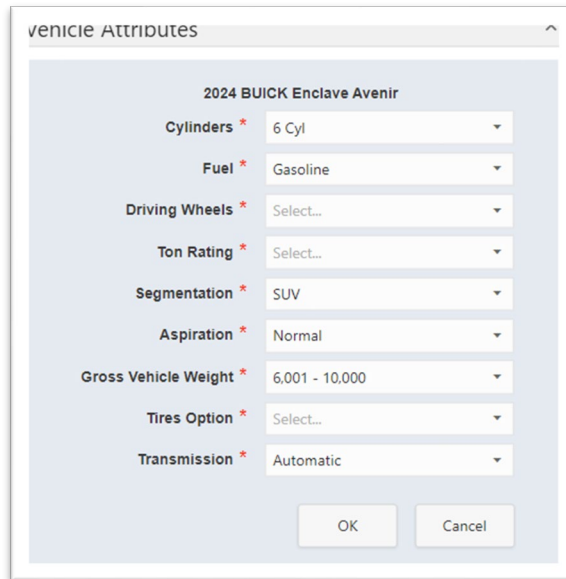
If you choose to add the Make and Model instead of the VIN, you will be required to add the Vehicle attributes. You can preview rates without a VIN. You are still required to enter a VIN to submit a contract. Rates are subject to change upon entering a VIN due to exact classification.

- To add the **Vehicle Attributes**, click the **Edit Button**.



Deal #
 Sale Odometer *
 Type *
 VIN
 No VIN Decode
 Year *
 Make *
 Model *
Vehicle Attributes * please specify
 Sale Date *
 In-Service Date
 Stock #

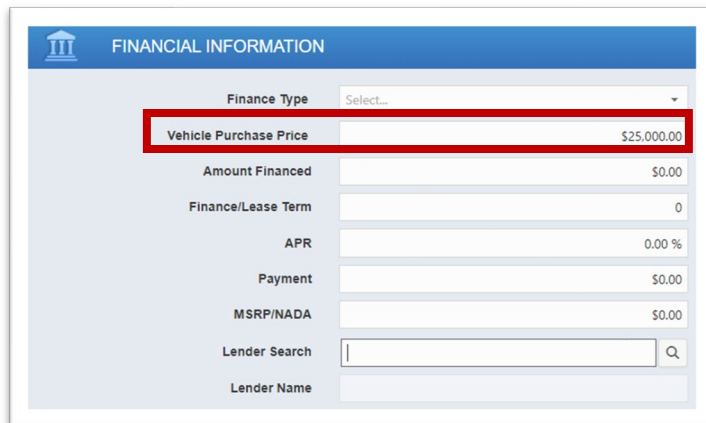
- Complete the **Vehicle Attributes** and 'Click' Ok.



2024 BUICK Enclave Avenir
 Cylinders *
 Fuel *
 Driving Wheels *
 Ton Rating *
 Segmentation *
 Aspiration *
 Gross Vehicle Weight *
 Tires Option *
 Transmission *

- On the right side of the screen, you will enter the Vehicle Purchase Price.

If the vehicle is financed, you are requested to complete a lender search before proceeding.



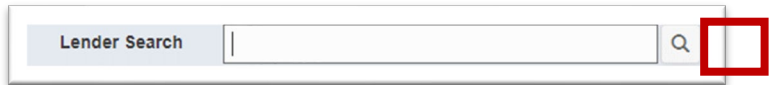
Finance Type
Vehicle Purchase Price
 Amount Financed
 Finance/Lease Term
 APR
 Payment
 MSRP/NADA
 Lender Search
 Lender Name



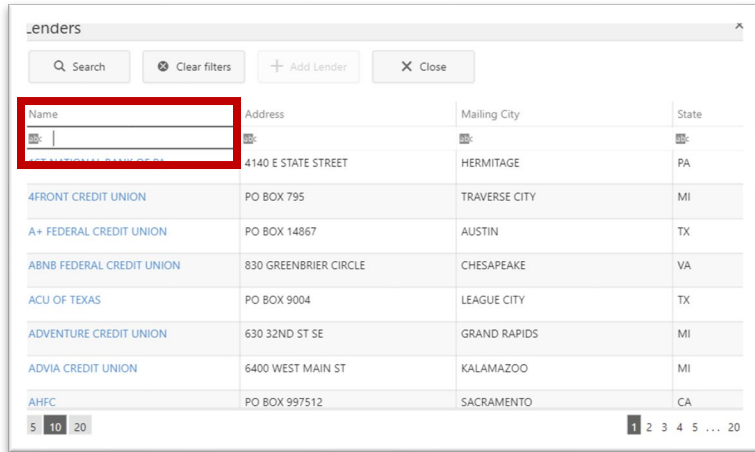
Not completing the Lender Search can result in the incorrect form being populated and funding will be denied. Full financial information is required to return rates for GAP products.

Lender Search

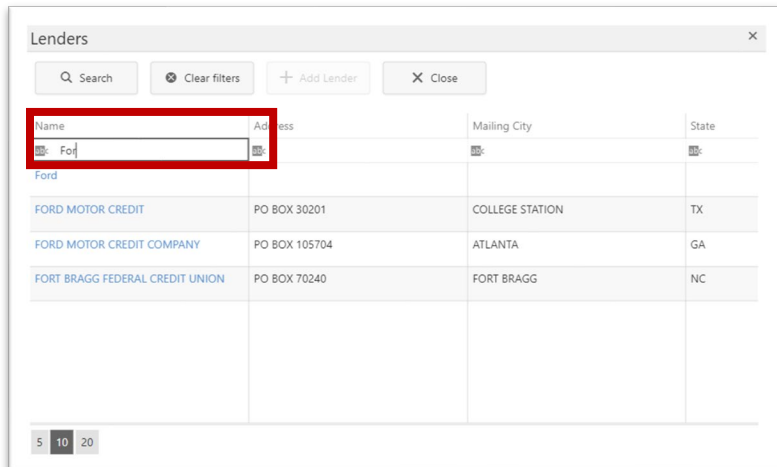
7. 'Click' the lookup icon to begin the Lender Search.



8. The Lenders screen will open and display the list of lenders in alphabetical order in the Name column.

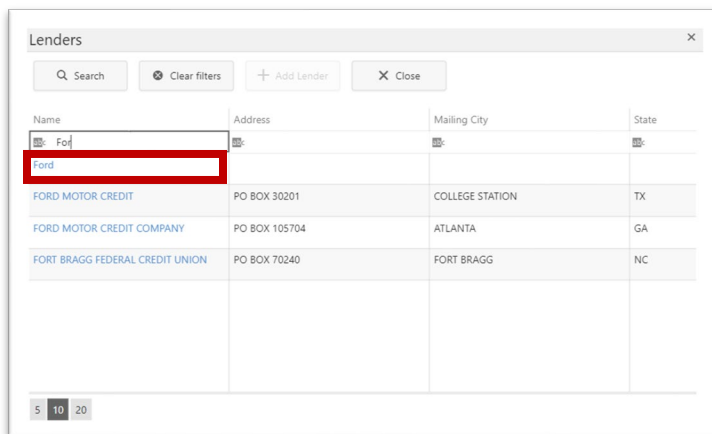


9. Type the name of the Lender in the Name Search Field. The field will search and narrow down the Lenders as you type.



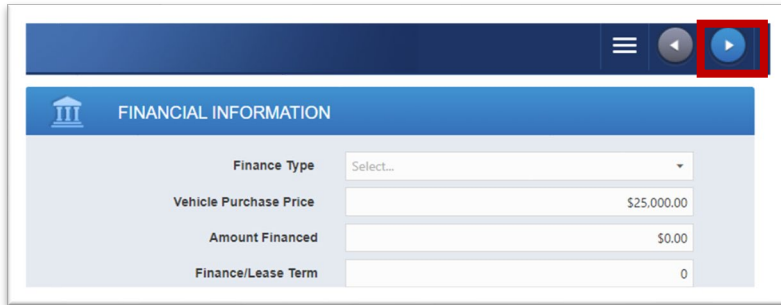
10. If the correct Lender appears in the list, select the lender name and proceed to step 11.

If the Lender does not exist, you will need to call the Agent Dealer Services team at 800-723-6035.



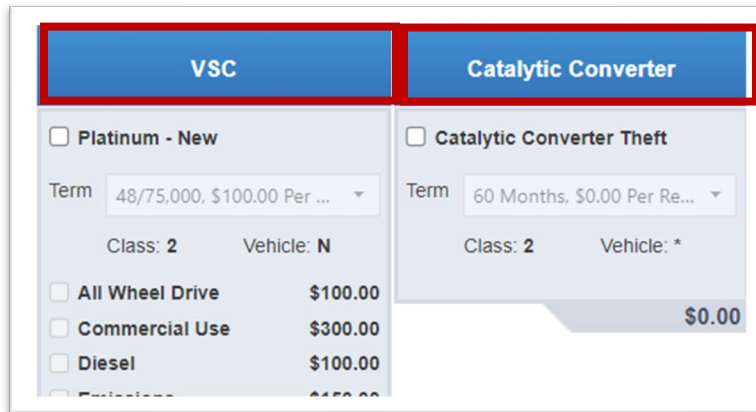

Product Selection

11. When the **Vehicle and Financial Information** has been completely entered, Select the white arrow in the upper right corner of the page to move forward or you can use the **Next** Button on the bottom of the screen.



12. 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 multiple VSC products are available, you can scroll through using the mouse or the bar on the right to view and choose the correct VSC.

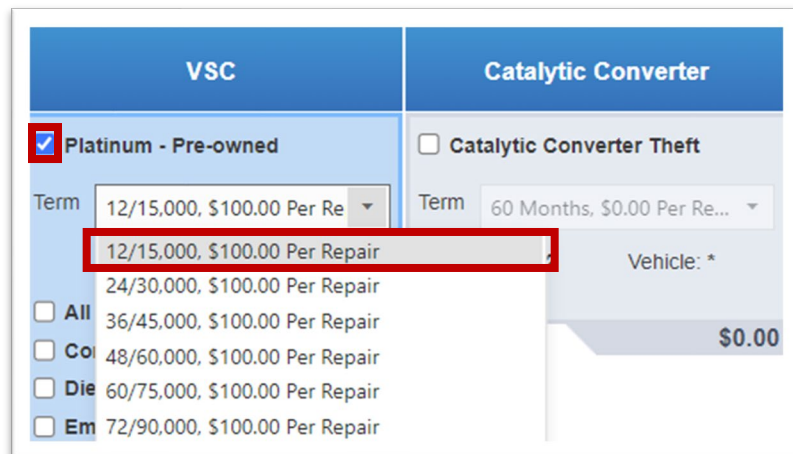




If there are no product results displayed, this may indicate the Vehicle is ineligible.

13. Select the product coverage checkbox.

Once you select the product coverage checkbox, you will be presented with a selection of associated terms to choose from the drop-down.

Select the desired term from the drop-down.

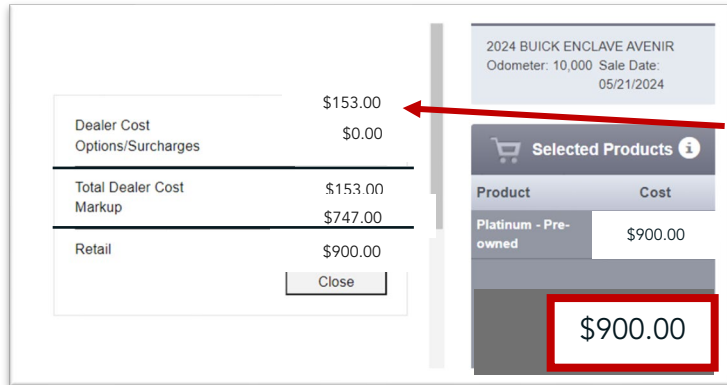
Surcharges associated with the Vehicle Information are already selected. Please mark any additional surcharges before you continue.

Product Pricing

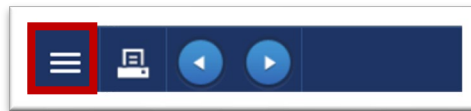
14. The coverage price(s) selected are displayed on the right side of the Select Products screen.

The total of all coverages selected displays at the bottom of the Selected Products screen.

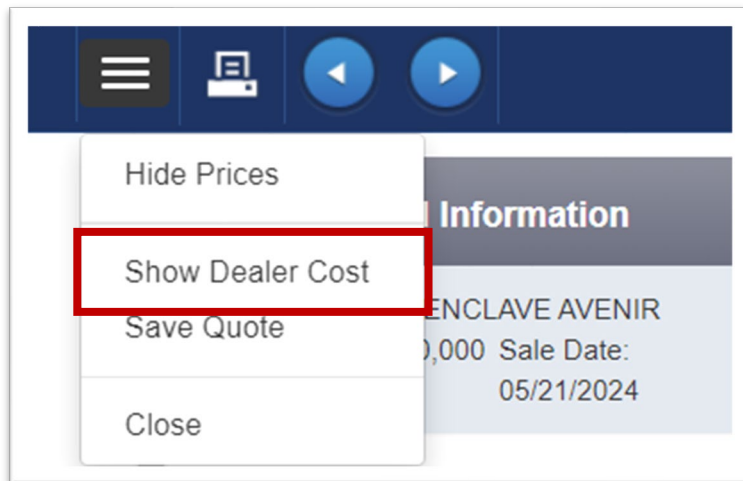
You may select the 'i' to view the Product Price Summary.



15. You can view the **Retail Price** or **Dealer Cost** by selecting from the three horizontal lines.

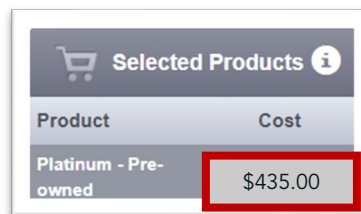
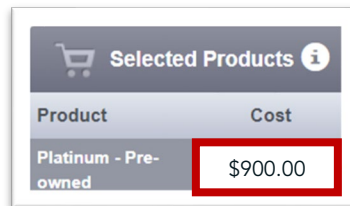


16. From the menu, you can switch between viewing Cost or Retail by selecting the **Show Dealer Cost** or **Show Retail** view.

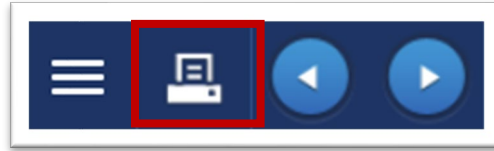


17. When the **Show Retail** view is selected, the pricing box below the Cost Header will be open for editing the retail price of the coverage being charged to the Customer.

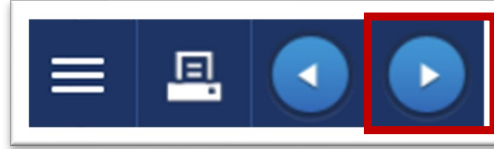
When the **Show Dealer Cost** view is selected, the pricing box will display the dealer cost of the coverage and will be 'grayed out' from editing.



18. To print a quote of the selected coverage(s), select the Print Icon in the upper right corner.



19. To proceed to the Customer Information screen, select the next button on the bottom of the screen or select the white arrow in the upper right corner of the page to move forward.



You are still required to enter a VIN to submit a contract.

You will not be able to proceed to the next screen if you have not entered the VIN.

Customer Information

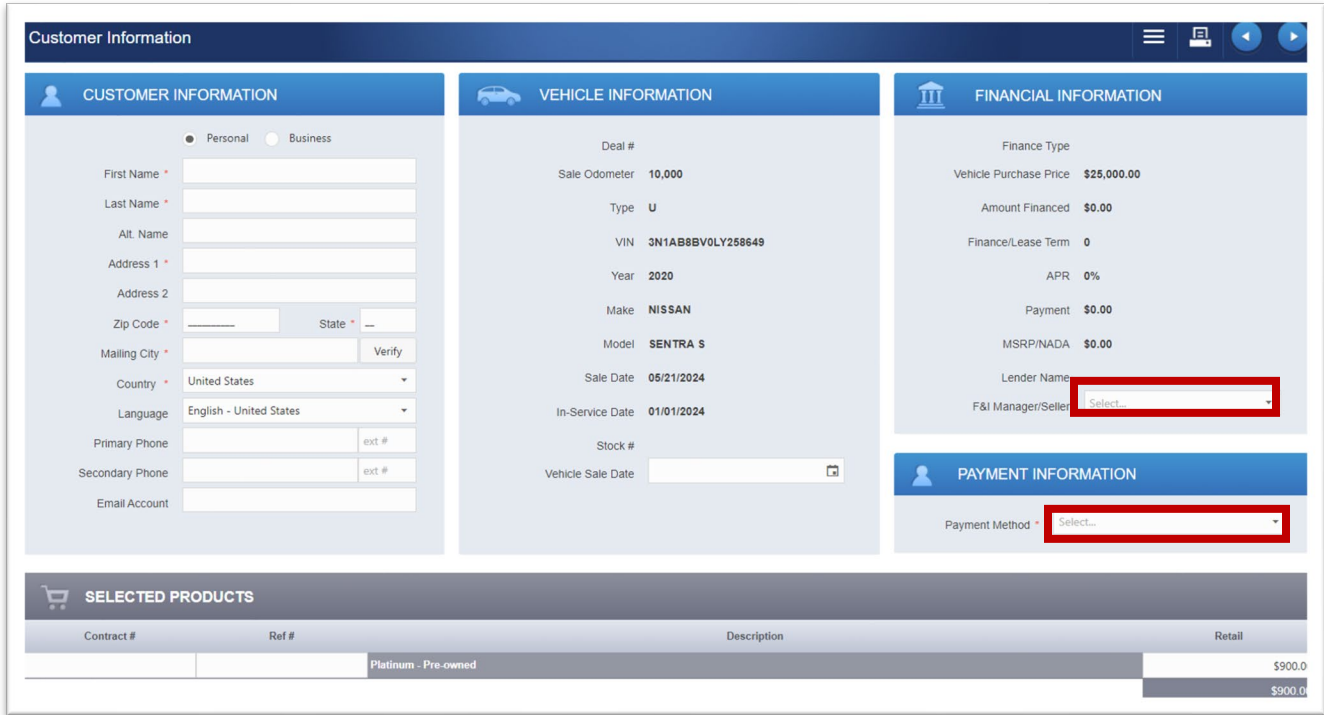
20. Enter the required * Customer information for all fields on the **Customer Information screen**. Vehicle and Financial information are carried forward from the previous screen.

Contract #	Ref #	Description	Retail
		Platinum - Pre owned	\$900



All fields with red * indicates that required information must be entered before proceeding.

21. On the right side of the screen, complete the **Financial Information** by selecting the F&I manager and **Payment Information**.



Customer Information

CUSTOMER INFORMATION

Personal Business

First Name *

Last Name *

Alt. Name

Address 1 *

Address 2

Zip Code * State *

Mailing City * Verify

Country * United States

Language English - United States

Primary Phone ext #

Secondary Phone ext #

Email Account

VEHICLE INFORMATION

Deal #

Sale Odometer **10,000**

Type **U**

VIN **3N1AB8BV0LY258649**

Year **2020**

Make **NISSAN**

Model **SENTRA S**

Sale Date **05/21/2024**

In-Service Date **01/01/2024**

Stock #

Vehicle Sale Date

FINANCIAL INFORMATION

Finance Type

Vehicle Purchase Price **\$25,000.00**

Amount Financed **\$0.00**

Finance/Lease Term **0**

APR **0%**

Payment **\$0.00**

MSRP/NADA **\$0.00**

Lender Name

F&I Manager/Seller

PAYMENT INFORMATION

Payment Method

SELECTED PRODUCTS

Contract #	Ref #	Description	Retail
		Platinum - Pre-owned	\$900.00
			\$900.00

22. If the product selection includes **Catalytic Converter Coverage** or **GPS Theft**, you must add the Part # into the Ref # field next to that product line.



SELECTED PRODUCTS

Contract #	Ref #	Description	Retail
		Platinum - New	\$1,548.00
	#495126	Catalytic Converter Theft	\$169.00
			\$1,717.00

23. For **VSC**, the Maximum Rewards Participant will need to include their Tracking Code next to the VSC coverage in the **Ref # field**.



SELECTED PRODUCTS

Contract #	Ref #	Description	Retail
	1111-2222	Platinum - Pre-owned	\$900.00

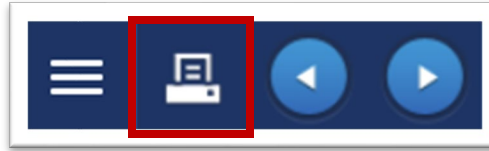
24. Prior to submitting the contract, you may edit the Retail Price of the coverage (s), if desired.



SELECTED PRODUCTS

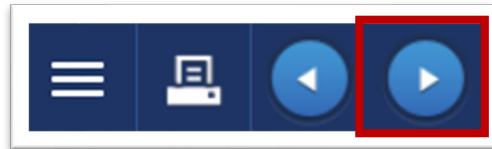
Contract #	Ref #	Description	Retail
	1111-2222	Platinum - Pre-owned	\$900.00
			\$900.00

25. '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.

26. 'Click' the white arrow in the upper right corner to submit the contract or 'Click' the finish button on the bottom.

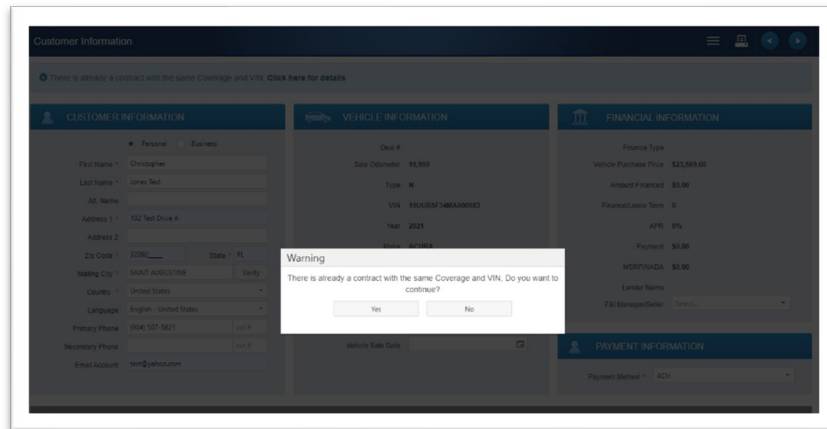


27. In the event the contract is a duplicate, you will receive an error to review contracts. Please review all prior coverage.

* If the other contract is not valid/duplicate and hasn't been paid for, it can be voided.

If the other contract is not valid/duplicate and has been paid for and sold within 60 days, you can cancel the contract to release their monies back to them.

If the other contract is not valid/duplicate and has been paid for and after 60 days, they would need to submit documentation for cancellation.



Final Documents

28. On successful submission of the contract, the Purchased Products page will appear.

This includes the contract numbers and the opportunity to print final terms and conditions.

Purchased Products

🛒 **PURCHASED PRODUCTS**

Status	Send To DMS	Contract #	Reference #	Coverage
Pending	<input type="checkbox"/>	VSC-10000517	1111-4444	Platinum - New
Pending	<input type="checkbox"/>	CCT-10000049	111111	Catalytic Converter Theft
				Grand Total:

Print

Contracts have been successfully saved, please click the Print icon in the upper right corner to print the documents. Please make sure to remit your business according to your agree