

# VSC Contract Quote Entry and Submission:

## Step 1

Account: TestRem - TEST REMITTANCE Help | Contact Us  
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Main Quote Contract Remittance Claims Reports Settings

Click here to create NEW quote → New Search

To save quote click + to open panel and enter customer first and last name

The Plan Purchase Date, VIN and Odometer fields in red are required to save a VSC Quote

Templates may be created/edited in Settings

Warranty Start Date is required for some VSC Plans

Click arrow to see retail breakdown

Click Options to see eligible options.

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QUOTE

Plan Purchase Date: 03/15/2011 F&I Manager: Admin F&I

CUSTOMER

VEHICLE (2009 HONDA ACCORD LX(ACCORD))

VIN	Odometer	Warr. Start Date	Purchase Price	Stock #	Base Warranty	Powertrain Warranty
JHMCP26339C00879	1,000				36 / 36000	

Attributes (2009 HONDA ACCORD LX(ACCORD)/Upper Midsize (Car)/Normal/4 Cyl/Front Wheel Drive/Gas)

LOAN/LEASE

LIENHOLDER

PRODUCTS

Select Template Clear All Selections

VSC	Program	Type	Plan	Term	Deductible	Retail
<input type="checkbox"/>	Menu Integration Pl.	Used	Gold - Used Vehicl	60/65,00	\$50.00	\$2,625.00
						Options (6)
						\$2,625.00

CONTRACTED PRODUCTS

Save Quote Print Quote Close Cancel Changes

Click to view available programs on the Select Quote screen

Click drop down arrow to change selection

Click to see details for ineligible plans

Click arrows for filtering options

Select Quote ×

Show Ineligible Plans

Program	Type	Plan	Term	Deductible	Retail	Options
Menu Integration Plans	New	Discountable Regulated Plan ~	24/24,000	\$0.00	\$1,284.00	Options
Menu Integration Plans	New	Discountable Regulated Plan ~	24/24,000	\$100.00 Disappearing	\$684.00	Options

Print Select Cancel

Choose a Program and click Select to return to the Quote screen

# Step 2

Once quote is accepted, complete highlighted areas to print and submit a contract:

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**QUOTE**

Plan Purchase Date: 03/15/2011 F&I Manager: Admin F&I

**CUSTOMER (DAP, DEMO)**

First Name: DEMO MI: MI Last Name: DAP Title: Title  
Address: 123 MAIN ST Address 2: City: LOMBARD State: IL ZIP: 60148 Primary Phone: (555)555-5555 x5555 Email: dap@fiadmin.com

**VEHICLE (2009 HONDA ACCORD LX(ACCORD))**

VIN	Odometer	Warr. Start Date	Purchase Price	Stock #	Base Warranty	Powertrain Warranty
JHMCP26339C00879	1,000		\$24,000.00		36 / 36000	

Attributes (2009 HONDA ACCORD LX(ACCORD))/Upper Midsize (Car)/Normal/4 Cyl/Front Wheel Drive/Gas

**LOAN/LEASE**

**LIENHOLDER**

**PRODUCTS**

Select Template [Clear All Selections](#)

VSC	Program	Type	Plan	Term	Deductible	Retail
	Menu Integration Pl	Used	Gold - Used Vehicl	60/65,00	\$50.00	\$2,625.00 Options (6) \$2,625.00

**CONTRACTED PRODUCTS**

Save Quote Print Quote Close Cancel Changes

Click to clear selected Program(s)

Click to Submit and print Form

Click to Preview Form

Click to see Plan Information

# Contract Entry:

The contract entry page is designed for the dealer's office clerk to enter sold contracts.

Enter all information necessary to create a contact.

Account: NTA065 - WINDY CITY AUTO

Quote | **Contract** | Remittance | Claims | Reports | Settings

Entry  
Search

Click Entry to create a contract

Choose appropriate product(s)

### Contract Entry

Plan Purchase Date: 06/01/2011 | Deal Type: LOAN | Deal Products:  VSC,  GAP,  MNT | F&I Manager: [ ]

**Customer (SMITH, JOHN)**

First Name: JOHN | MI: [ ] | Last Name: SMITH | Title: [ ]  
Address: 123 EVERGREEN | Address 2: [ ] | City: SPRINGFIELD | State: TX | ZIP: 60137 | Primary Phone: (555)123-1234 | Secondary Phone: [ ]  
Email: [ ] | Alternate Contact: [ ] | Language: English

**Vehicle (2010/TOYOTA/TACOMA PRERUNNER)**

VIN: 3TMNX4GN1AA23S1DA | Odometer: 1,200 | Mfg. Warr. Start Date: 06/07/2011 | Purchase Price: [ ] | Stock #: [ ] | Base Warranty: 36 / 36,000 | Powertrain Warranty: 60 / 60,000

**Attributes (2010/TOYOTA/TACOMA PRERUNNER/Compact Pickups/Normal/4 Cyl/Rear Wheel Drive/1/2 ton/Gas/6,000 and less)**

**Loan/Lease**

Term	Finance Amt	MSRP	APR	Monthly Pmt	1st Pmt Date	Balloon Amt	Residual Amt
12	\$12,000.00	\$24,000.00	2.5%	\$260.00	[ ]	[ ]	[ ]

**Lienholder**

Lienholder Name: JP MORGAN CHASE  
Address: 123 LENDER AVE. | Address 2: [ ] | City: TEST CITY | State: IN | ZIP: 46815 | Primary Phone: [ ] | Email: [ ]

**Products**

Product	Contract #	Program	Type	Plan	Term	Deductible	Remit	Retail	Options
VSC	VSC123	PREFERRED VSC	NEW	GOLD	36/36,000	\$50	\$815.00	[ ]	<a href="#">Options</a>
GAP	GAP123	DEMO PROGRAMS (GAP)		GAP - PER 1K	12 months		\$210.00	[ ]	<a href="#">Options</a>
<b>Total</b>							<b>\$1,025.00</b>	<b>\$0.00</b>	

Save | Save & New | Close

Enter contract number

Click to Save/  
Submit the  
contract

Click to submit the  
contract and open a new  
contract entry screen

# Contract Search:

Account: NTAA065 - WINDY CITY AUTO ▼

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Quote ▼ Contract ▼ Remittance Claims Reports Settings

Entry

Search

Click Search to find a contract

## FILTERS

To search for contracts sold outside this dealership please use Contract # or VIN #.

Search By:    
Sale Date From:  To:

Search [Advanced Search](#)

## CONTRACT LIST

Void	<a href="#">Customer</a> ↑	VIN	<a href="#">Sale Date</a>	Product	Contract #	Term*	Retail	Edit
<input type="checkbox"/>			08/31/2009	<span>P</span>	<a href="#">C0001111</a>	0/0	\$0.00	

Click arrow to see list of search criteria

Click to see additional search criteria

# Remittance:

Click Create to complete a remittance

Create  
Search

Select Product to remit  
Select Lienholder and Plan Purchase date and click filter to narrow search results  
After product is selected choose specific Program or ALL  
Contract Count & Total Remit represent a running total of selected contract(s)

Clicking these links will Include/Exclude all contracts

Create Remittance

Product:  VSC  GAP  MNT Program: ALL

Lienholder: ANY Plan Purchase Date: ALL DATES

[Include This Page](#) [Exclude This Page](#) [Include All Pages](#) [Exclude All Pages](#)

Contract Count: 1  
Total Remit: \$657.00

Select Contract(s) to be remitted

Include	Customer	VIN	Purchase Date	Contract #	Plan Description	Term	Deductible	Lienholder	Remit
<input checked="" type="checkbox"/>	CRAWFORD, COREY	JTDKN3DU1A0010059	08/23/2011	<a href="#">DAP80003633</a>	Bronze - Markup limits PM	36/45K	\$100 Disappearing		\$657.00
<input type="checkbox"/>	MOORE, JERRY	1FAFP40471F164334	04/11/2011	<a href="#">CMD1001</a>	Silver - Regulated Retail	36/45K	\$50		\$600.00

<< Prev Page 1 of 1 Next >> Records Per Page: 100

Click to see/print Remittance(s)  
Download all contracts not yet remitted to Excel

Click to complete Remittance at a later time  
Click submit to print Remittance(s)  
After printing the Remittance(s) send copy with payment to the provider

# Remittance Search:

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Create  
Search

Click Search to find remitted contracts

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Remittance Search can be filtered by Submission Date

Remittance Search

Submission Date: CURRENT MONTH ▼ From: 06/01/2011 To: 06/30/2011 Filter

Remittances

<a href="#">Submission Date</a> ↓	<a href="#">Cycle Month</a>	Remittance Number	Product	Contract Count	Total Remit	Reprint
06/06/2011	April 2012	42271-002	GAP	2	\$635.00	

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Click to view remittance

# Creating and Adding a Claim:

## Step 1

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Click Contract and Search to find a contract to add a claim to

Entry  
Search

Limit search as required

Click on an existing contract to add a claim

Filters

To search for contracts sold outside this dealership please use Contract # or VIN #.

Search By:  ALL  [Advanced Search](#)

Sale Date From:  To:

Contract List

Void	<a href="#">Customer</a> ↑	VIN	<a href="#">Purchase Date</a>	Product	Contract #	Term*	Retail	Edit
<input type="checkbox"/>	CRAWFORD, COREY	JTDKN3DU1A0010059	08/23/2011	VSC	<a href="#">DAP80003633</a>	36/45	\$788.40	
<input type="checkbox"/>	MOORE, JERRY	1FAFP40471F164334	04/11/2011	VSC	<a href="#">CMD1001</a>	36/45	\$350.00	

## Step 2

Account: 42271 - DAP TEST SELLER ▼

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**General Information** [Back to Search](#)

Plan Purchase Date: 04/12/2011	Customer Name: MAHENDRA, VIKAS, 2	Vehicle: 1FMZU73E32ZA01701	<a href="#">Attributes</a>
Mfg. Warr. Start Date:	Address: , IL	Sale Odometer: 0	2002 FORD EXPLORER XLT
Seller: DAP TEST SELLER	Primary Ph.:		
F&I Manager: Admin User	Secondary Ph.:		
Stock #:	Email:		
Lienholder:	Language: EN		
	Alt. Contact:		

[Edit Customer Information](#)

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☐ Service Contract (VSCMH20110412-02) Pending ▶

Plan Type:	Term: Miles: Ded: Payment Option:	Retail: \$0.00 ▼	
Program:	Effective Date:		
Plan Name:	Effective Odom: 0 - 0		

Added Options:

☑ Claims [Add Claim](#)

Re-generate Contract
Edit Contract
Cancellation Quote
Void Contract

Click Add Claim to open the Claim Detail screen

## Step 3

**Claim Detail**

Received Date: 06/07/2011	Loss Date: 06/01/2011	Loss Odometer: 1,000	Repair Number: 1234
Customer Phone #:	Service Contact:		

Customer Complaint:

Cause:

Correction:

Additional Information:

Labor:	Labor Tax:	Part Tax:	Deductible:
\$72.00	0.000 %	7.600 %	\$100

Loss Code	Cov.	Part #	Part Description	Qty	Part Price	Labor Time	Tax	Total
B1208	Y	456	Accumulator for Brakes	1.000	\$250.00	2.000	\$19.05	\$414.04
...				0	\$0.00	0	\$0.00	\$0.00
...				0	\$0.00	0	\$0.00	\$0.00
Requested :								\$414.04

Add... New Line Submit

Provide more claim information for claim processing

The following fields are required to submit a claim

Click here to submit the claim. Claim cannot be edited after being submitted.



# Claim Search:

Click Claims to search for existing contract claims

Choose search criteria as required from the dropdown menu

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- Claims
- Reports
- Settings

## Filters

Search By:

## Claim List

Click Search button to refresh search results.

Status	Claim #	RO#	RO Rcvd Date	Loss Date ↓	VIN	Loss Description	Last Pay Date	Last Pay Amt
Open	<a href="#">1000455895</a>	1234	06/09/2011	06/02/2011	A0010059	Rental (Additional Days @ \$50 / Day)/Benefits/Services		

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Status: ● - Open ● - Cancelled ● - Denied ● - Paid ● - Void

# Settings:

Account: NTAAYZY - WINDY CITY DEMO, INC

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Quote | Contract | Remittance | Claims | Reports | **Settings**

Click Settings to view the following screen

**BASE MARKUP**

GAP	Add \$	<input type="text" value="150.00"/>	OR %	<input type="text" value="0.00"/>	Whichever is	<input type="text" value="Greater"/>	<a href="#">Exceptions</a>
VSC	Add \$	<input type="text" value="200.00"/>	OR %	<input type="text" value="0.00"/>	Whichever is	<input type="text" value="Greater"/>	<a href="#">Exceptions</a>

[Save](#) [Cancel Changes](#)

**F&I MARKUP**

GAP	Add \$	<input type="text"/>	OR %	<input type="text"/>	Whichever is	<input type="text" value="Greater"/>	<a href="#">Exceptions</a>
VSC	Add \$	<input type="text"/>	OR %	<input type="text"/>	Whichever is	<input type="text" value="Greater"/>	<a href="#">Exceptions</a>

[Save](#) [Cancel Changes](#)

**RETAIL PRICE LIMITS**

Product	Minimum	Maximum	
GAP	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<a href="#">Exceptions</a>
VSC	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<a href="#">Exceptions</a>

[Save](#) [Cancel Changes](#)

**TEMPLATES**

[Add New](#)

**SALE AUTHORITY**

Predefine markups by product as a percentage and/or fixed dollar amount

Click Exceptions to specify markup at program / plan level

Configure minimum/maximum retail price limits

Click + to view a list of Programs/Plans available for sale

To create a new template, Click Add New for the New Template screen to appear

When Load by Default: is marked, Template will appear automatically on Quote screen

[Save](#) [Cancel Changes](#) [Close](#)

**New Template**

GAP/VSC  Load By Default:

Product	Program	New/Used	Plan	Term	Deductible	
GAP	Guaranteed		GAP	36 months		<a href="#">Options</a>
VSC	Preferred V	N	Gold	48/48,000	\$50.00	<a href="#">Options</a>

## **Reports:**

Dealers have access to reports that are offered by provider. Click the Reports tab to view a list of reports.

Click Here

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