

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

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Main Quote Contract Remittance Claims Reports Settings

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 checked="" type="checkbox"/>	Menu Integration Pl	Used	Gold - Used Vehicl	60/65,00	\$50.00	\$2,625.00

Options (6) Submit

CONTRACTED PRODUCTS

Save Quote Print Quote Close Cancel Changes

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

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

Click to view available programs on the Select Quote screen

Click to see details for ineligible plans

Warranty Start Date is required for some VSC Plans

Click arrow to see retail breakdown

Click Options to see eligible options.

Click drop down arrow to change selection

Step 2

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

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Main Quote Contract Remittance Claims Reports Settings

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	[]	Options
GAP	GAP123	DEMO PROGRAMS (GAP)		GAP - PER 1K	12 months		\$210.00	[]	Options
Total							\$1,025.00	\$0.00	

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: Status ALL Search [Advanced Search](#)

Sale Date From: To:

CONTRACT LIST

Void	Customer ↑	VIN	Sale Date	Product	Contract #	Term*	Retail	Edit
<input type="checkbox"/>			08/31/2009	P	C0001111	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	DAP80003633	Bronze - Markup limits PM	36/45K	\$100 Disappearing		\$657.00
<input type="checkbox"/>	MOORE, JERRY	1FAFP40471F164334	04/11/2011	CMD1001	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:

Account: 42271C - DAP TEST SELLER 4 ▼ [Help](#) | [Contact Us](#)
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Main Quote ▼ Contract ▼ Remittance ▼ Claims Reports Settings

Create
Search

Click Search to find remitted contracts

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Main Quote ▼ Contract ▼ Remittance ▼ Claims Reports Settings

Remittance Search can be filtered by Submission Date

Remittance Search

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

Remittances

Submission Date ↓	Cycle Month	Remittance Number	Product	Contract Count	Total Remit	Reprint
06/06/2011	April 2012	42271-002	GAP	2	\$635.00	

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

Click to view remittance

Creating and Adding a Claim:

Step 1

Account: 42271 - DAP TEST SELLER ▼

Help | Contact Us
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Main Quote ▼ Contract ▼ Remittance ▼ Claims Reports Settings

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

Step 2

Account: 42271 - DAP TEST SELLER ▼

[Help](#) | [Contact Us](#)
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Main | Quote ▼ | Contract ▼ | Remittance ▼ | **Claims** | Reports | Settings

General Information [Back to Search](#)

Plan Purchase Date: 04/12/2011	Customer Name: MAHENDRA, VIKAS, 2	Vehicle: 1FMZU73E32ZA01701	Attributes
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](#)

☐ 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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[Help](#) | [Contact Us](#)

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- Main
- Quote ▼
- Contract ▼
- Remittance ▼
- 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	1000455895	1234	06/09/2011	06/02/2011	A0010059	Rental (Additional Days @ \$50 / Day)/Benefits/Services		

<< Prev Page 1 of 1 Next >> Records Per Page: 25

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

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

F&I MARKUP

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

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

RETAIL PRICE LIMITS

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

[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		Options
VSC	Preferred V	N	Gold	48/48,000	\$50.00	Options

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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Main

Quote ▼

Contract ▼

Remittance ▼

Claims

Reports

Settings

Reports

Category: ▼