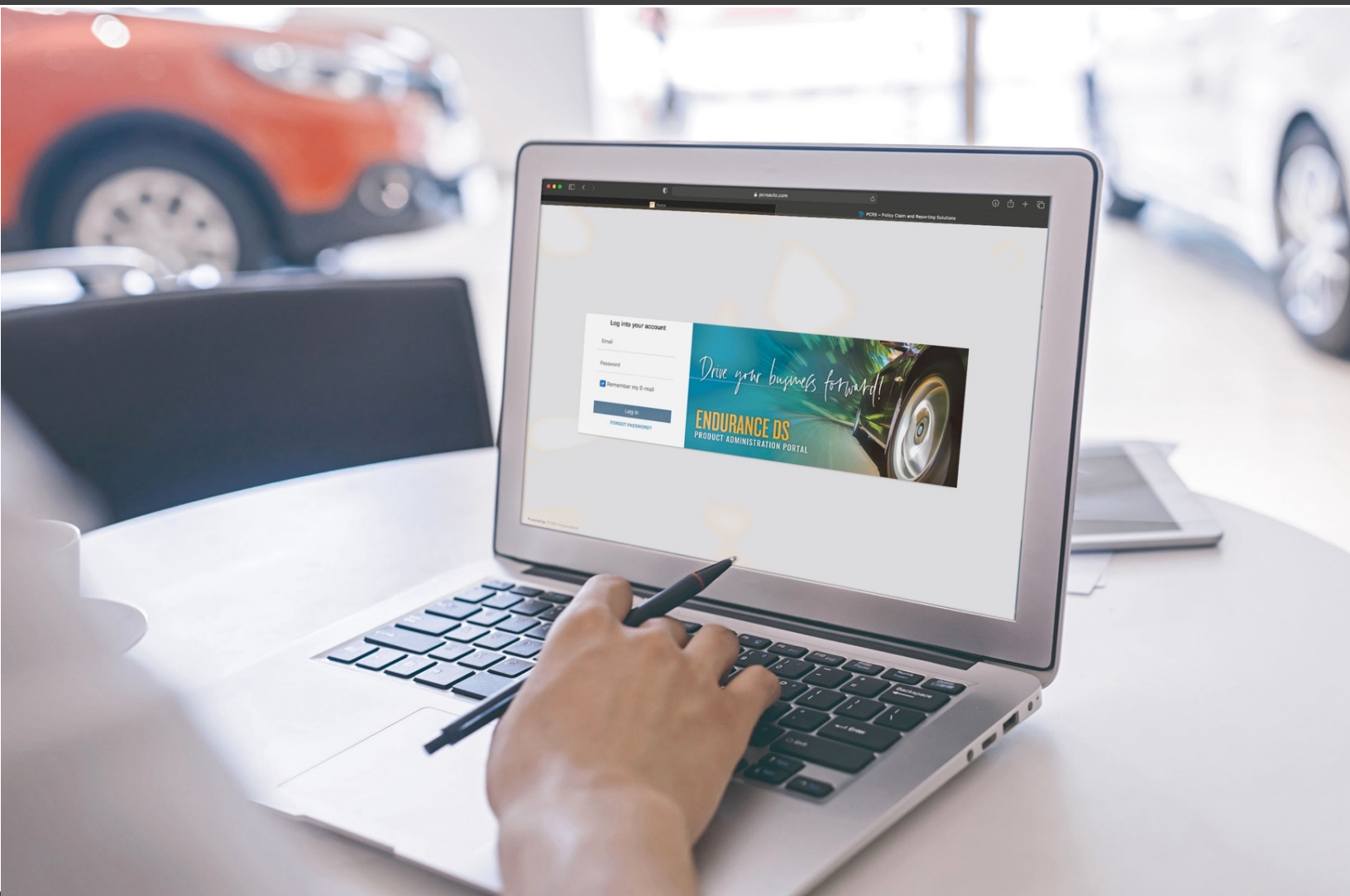




# PCRS ADMIN SYSTEM USER GUIDE

POLICY, CLAIM & REPORTING SOLUTIONS™ – POWERED BY PCMI CORP.



**ENDURANCE**  
**DEALER SERVICES**



LONG-TERM SUCCESS TAKES ENDURANCE®

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## VERSION INFORMATION

PCRS System version details and information can be found in the lower left of the window at login and/or while using the system.

## 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 specifically 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 User Guide leads you through the steps necessary to perform Dealer functions in the PCRS Admin System.

This guide will cover:

Log into PCRS Portal  
Quick Rater  
Search Contract  
Reporting

PCRS Homepage  
Add Contract  
Save Quote  
Search Dealer

This guide highlights some 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 specific needs, you may notice some differences between it and the screen captures used in this guide.

## Using This Guide

The PCRS Admin System User Guide is designed to be used as a reference and provided by Endurance DS.

This document is best used as a printed reference guide and is therefore optimized for printing and binding. The guide should be duplex printed for optimal presentation. This guide may be printed in black and white.

# LOGGING INTO PCRS

## Supported Web Browsers

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. This system supports the following browsers:



**Internet Explorer**  
*Most Recent Version*



**Safari**  
*Most Recent Version*



**Google Chrome**  
*Most Recent Version*



**Firefox**  
*Most Recent Version*



We strongly suggest upgrading your browser to the most recent version.

## PCRS Portal Access

We offer 2 options for accessing our Portal:

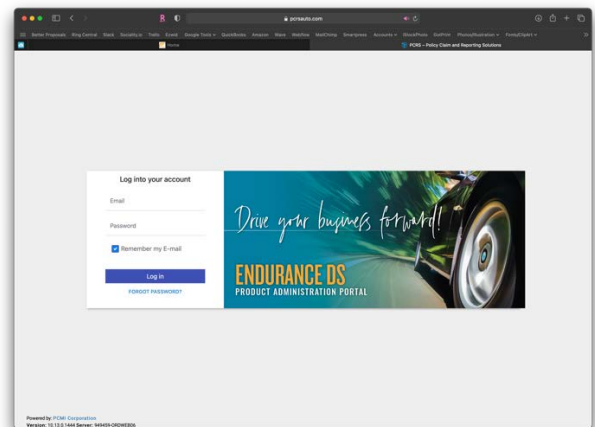
1. Open your web browser and go to the Endurance DS website:  
<https://www.enduranceds.com> then click on LOGIN button in the upper right to get to the PCRS Login screen shown here.

**OR**

2. Open your web browser and type in  
<https://endr.pcrsauto.com> to go directly to the PCRS Login page.

**THEN**

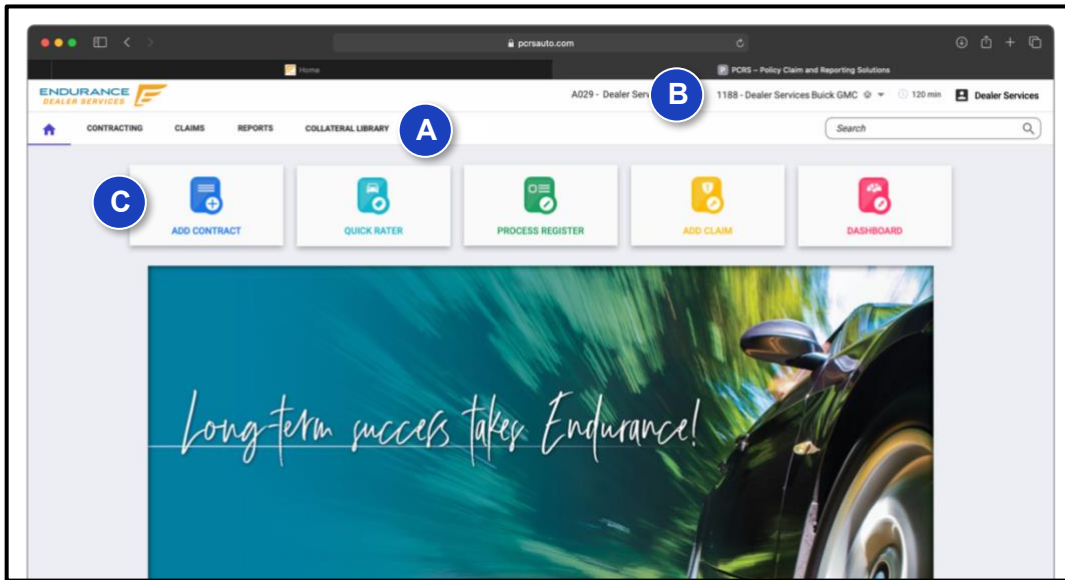
Enter your login email and password and 'Click' **Log in**.



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

## PCRS Homepage

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



A

### Navigation Menu:

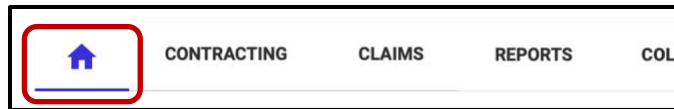
The top Navigation area features cascading menu options.



To view the options available under each section, simply hover your mouse over the option to display the menu and sub-menu.

a. **HOME:**

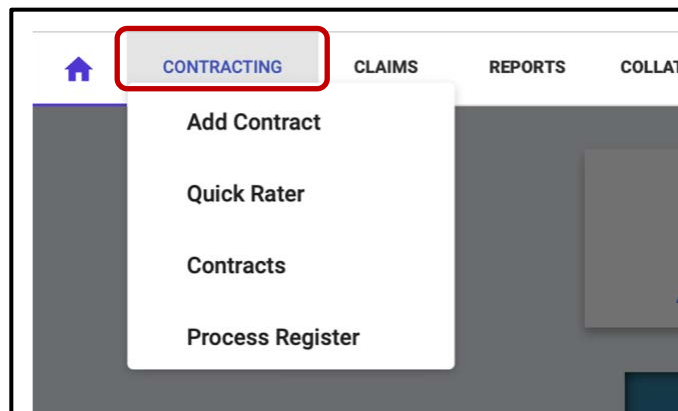
Takes you to the PCRS Homepage.



b. **CONTRACTING:**

Provides access to:

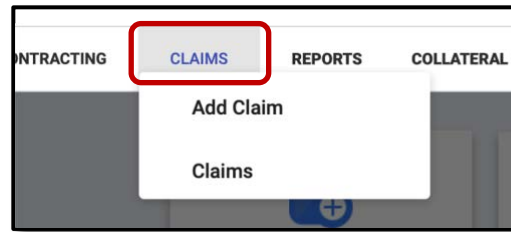
- Add Contract
- Quick Rater
- Contracts (Search)
- Process Register



c. **CLAIMS:**

Menu includes:

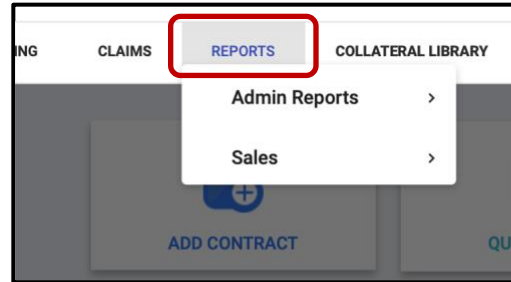
- Add Claim
- Claims (View/Search)



d. **REPORTS:** Access to PCRS Reports by category:

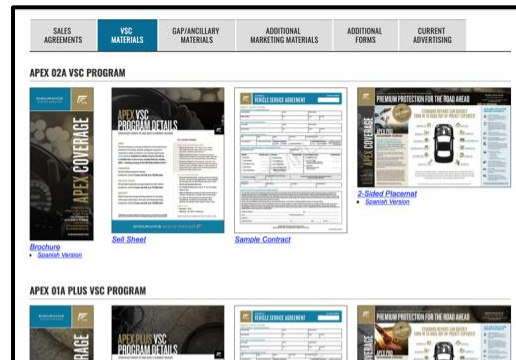
- Admin Reports
- Sales Reports

Each also has a sub-menu.



e. **COLLATERAL LIBRARY:**

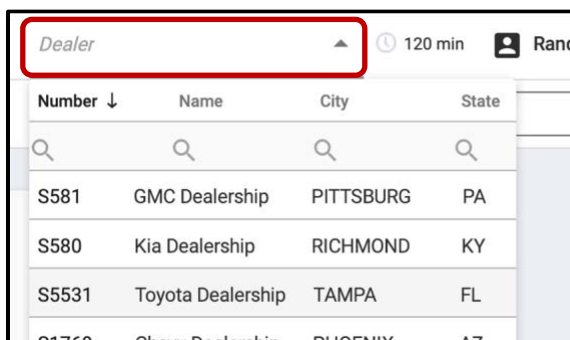
Access to EDS brochures, placemats, sell sheets, forms, and other materials in PDF format.



Based on granted Security Access, some of the options described may not be available to all users.

## B Right Header Navigation:

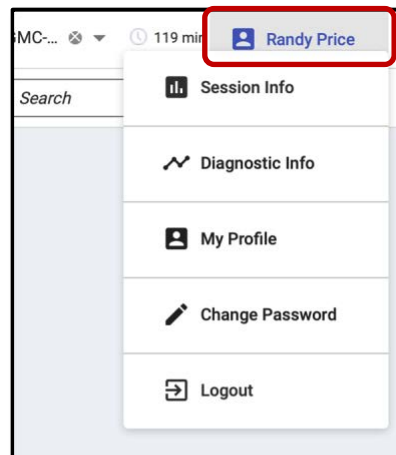
- a. **Select a Dealer.** (This may be auto populated for you or it may not be visible based on setup).



- b. **User Information:** Hover over your name to display your current User information. Menu includes:

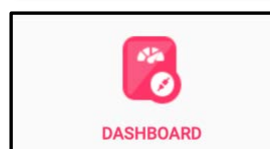
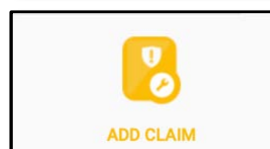
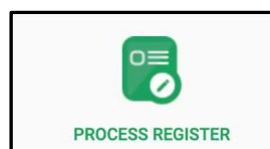
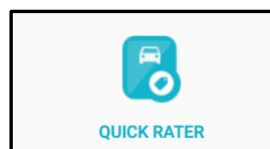
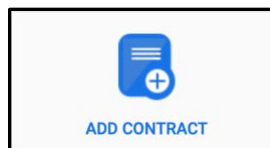
- Session Info
- Diagnostic Info
- My Profile
- Change Password
- Logout

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



## C Navigation Buttons:

- a. Select **Add Contract** to begin contract rating process. (If you have multiple rooftops in your system, be sure to select a Dealer!)
- b. Select **Quick Rater** to begin the contract rating process. (If you have multiple rooftops in your system, be sure to select a Dealer!)
- c. Select **Process Register** to remit Contracts, Claims, and Other transactions.
- d. Select **Add Claim** to start claim redemption. (This feature requires prior approval).
- e. Select to launch the **Sales Dashboard**.



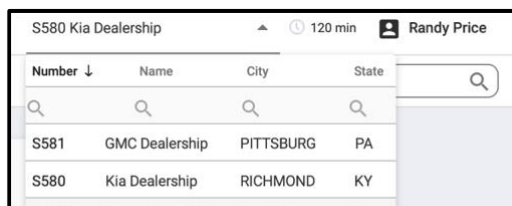
## **NOTES**

# CONTRACTS

The **Add Contract** function of the PCRS Agent Portal allows you to electronically rate and submit contracts, view all eligible products, and display prices for the vehicle.

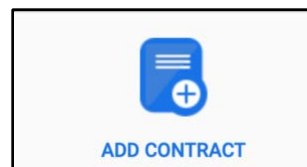
## Add Contract

1. Verify that you have the desired Dealer selected and displaying on the PCRS Homepage.



Number ↓	Name	City	State
S581	GMC Dealership	PITTSBURG	PA
S580	Kia Dealership	RICHMOND	KY

2. Select the **Add Contract** link to open the Deal Setup screen and begin adding a contract.

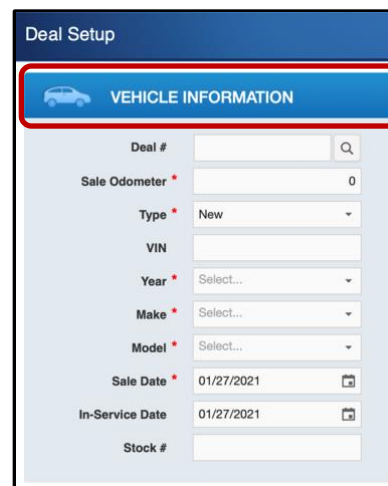


If the Add Contract screen does not appear, be sure you have 'allow pop-ups from this site' enabled in your browser.

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 enter the VIN and it will decode it 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.



Deal Setup

**VEHICLE INFORMATION**

Deal #

Sale Odometer \*  0

Type \* New

VIN

Year \* Select...

Make \* Select...

Model \* Select...

Sale Date \* 01/27/2021

In-Service Date 01/27/2021

Stock #



The **Sale Date** of the contract cannot be backdated!

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

If the vehicle is financed, you will need to complete a **Lender Search** before proceeding.

Deal Setup

FINANCIAL INFORMATION

Finance Type \* Select...

Vehicle Purchase Price \* \$0.00

Amount Financed \$0.00

Finance/Lease Term 0

APR 0.00%

Payment \$0.00

MSRP/NADA \$0.00

Lender Search [Search Icon]

Lender Name



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

## Lender Search

- 'Click' the lookup icon to begin the **Lender Search**.

Lender Search [Search Icon]

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



Lenders

Search Clear filters Add Lender Close

Name	Address	City
101 Auto Funding	5737 kanan rd #656	canoga park
1145 LINDEN RD, None	1145 LINDEN RD, None	Prescott
121 FINANCIAL CREDIT UNION	9700 TOUCHTON RD	JACKSONVILLE
180 Auto Sales LLC	318 N Power RD	Mesa
1st advantage credit union	po box 2116	newport news
1ST ATLANTIC FCU	468 INDUSTRIAL WAY WEST	EATONTOWN
1st Century Bank	1780 N Broad St	Tazwell
1ST COMMUNITY BANK	5406 EVERHART RD	CORPUS CHRISTI
1ST COMMUNITY CU	PO BOX 167	SPARTA
1ST COOPERATIVE FEDERAL CREDIT UN	808 KNOX ABBOTT DRIVE	CAYCE

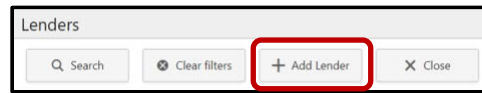
5 10 20

- Type the name of the Lender in the **Name Search Field**. The field will search and narrow the Lenders as you type.
- If the correct Lender appears in the list, 'Click' the lender name to select and proceed to step 11.

If the Lender does not exist; you will need to continue to step 9 and add the Lender.

## Add Lender

- To add a new Lender not yet in the database, 'Click' **+ Add Lender** to display the **Add Lender** screen.



- Enter the required\* Lender Information including the Lender Type from the drop- down box.

When complete, 'Click' the **SAVE** button to save and add the Lender.

The Lender will now appear in the Lender Search for you to select.

## Product Selection

- When **Vehicle** and **Financial** information have been completely entered, 'Click' the white arrow in the upper right corner of the page to move forward.



- 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.

VSC	GAP	Complete Auto Value Protection	Appearance Protection	Key Replacement	Windshield
Select Product	Select Product	Select Product	Select Product	Select Product	Select Product
<input type="checkbox"/> Apex 2.0 Pro Term 12/12,000, \$0.00 Per R... Class: 6 Vehicle: * <input checked="" type="checkbox"/> Commercial \$350.00 <input checked="" type="checkbox"/> Diesel <input checked="" type="checkbox"/> Lift Kit \$400.00 <input checked="" type="checkbox"/> Turbo/Supercharger <input checked="" type="checkbox"/> 4x4/AWD	<input type="checkbox"/> 150% GAP Term 60 Months Class: 1 Vehicle: * <input type="checkbox"/> Commercial \$50.00 <input type="checkbox"/> \$0.00	<input type="checkbox"/> Complete Auto Value Protection Term 12 Months Class: 1 Vehicle: * <input type="checkbox"/> Cosmetic Wheel Repair & Curb Impact \$12.00 <input type="checkbox"/> Cosmetic Wheel \$57.00	<input type="checkbox"/> Appearance Protection Term 12 Months Class: 1 Vehicle: * <input type="checkbox"/> \$0.00	<input type="checkbox"/> Key Replacement Term 12 Months Class: 2 Vehicle: * <input type="checkbox"/> \$0.00	<input type="checkbox"/> Windshield Repair & Replace 36 Months Term 36 Months Class: 1 Vehicle: * <input type="checkbox"/> \$0.00 <input type="checkbox"/> Windshield Repair & Replace 60 Months



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 in a drop-down.

'Click' to select the desired Term from the drop-down.



VSC

Select Product

☒ Apex 2.0 Pro

Term: /12,000, \$0.00 Per Repair

12/12,000, \$0.00 Per Repair  
12/15,000, \$0.00 Per Repair  
12/25,000, \$0.00 Per Repair  
24/25,000, \$0.00 Per Repair  
24/30,000, \$0.00 Per Repair  
24/50,000, \$0.00 Per Repair  
36/36,000, \$0.00 Per Repair  
36/50,000, \$0.00 Per Repair  
36/75,000, \$0.00 Per Repair

☐ 150% GAP

Term: 60 Months

## Product Pricing

14. 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.

Deal Information

1GT49PEY2MF168109  
2021 GMC SIERRA 2500HD AT4  
Odometer: 13 Sale Date: 01/22/2021

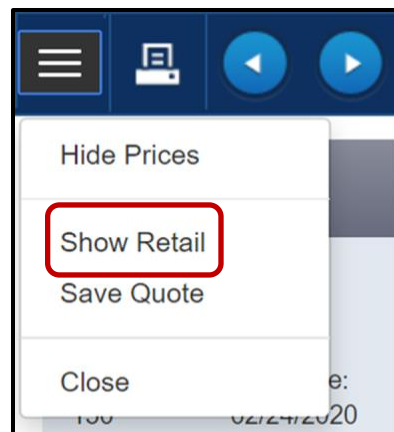
Product	Cost
Apex 2.0 Pro	\$4,823.00

**\$4,823.00**

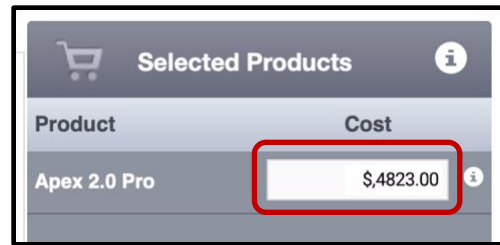
15. You can view the **Retail Price** or **Dealer Cost** by selecting from the three horizontal lines.



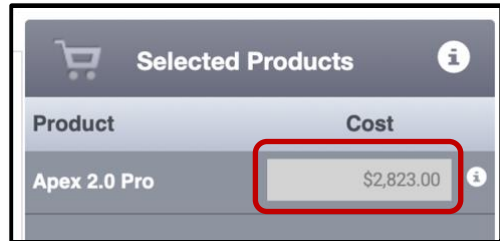
16. From the menu, you can switch between viewing Cost or Retail by 'Clicking' the **Show Dealer Cost** or **Show Retail** view.



17. 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.



18. To print a quote of the selected coverage(s), 'Click' the Print Icon in the upper right corner.
19. To proceed to the Customer Information screen, 'Click' the white arrow in the upper right corner of the page to move forward.



## 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
**		Service Guard Platinum - Authorize	\$900.00
			\$900.00



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

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



SELECTED PRODUCTS

Contract #	Ref #	Description	Dealer Cost	Markup	Retail
		Apex 2.0 Pro	\$2,823.00	\$2,000.00	\$4,823.00
			\$2,823.00	\$2,000.00	\$4,823.00

22. '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.

23. 'Click' the white arrow in the upper right corner to submit the contract.



## eSignature

24. 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 select the I Agree checkbox and 'Click' the Accept button.



The screenshot shows the 'eSignature confirmation' dialog box. It contains instructions for both the Customer and the Selling Dealer. At the bottom, there is a checkbox labeled 'I agree to use electronic record and signatures.' with a red arrow pointing to it. Below the checkbox is a red rectangular box highlighting the 'Accept' button. A 'Decline' button is also visible to the right of the 'Accept' button. A '(View Details)' link is located to the right of the checkbox.

**eSignature confirmation**

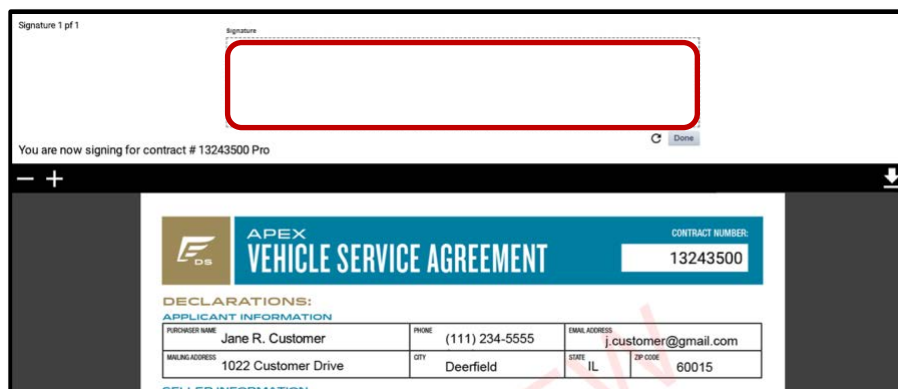
**Customer:** You have an option to use eSignature and sign the documents electronically, or, if you prefer, the documents will be printed out for your standard signature.

**Selling Dealer:** After the customer signs this service contract, either electronically or by hand, you are **required** to print and provide a hard copy of this service contract to your customer. Also, please print a copy for your records.

☒ I agree to use electronic record and signatures. ([View Details](#))

**Accept** **Decline**

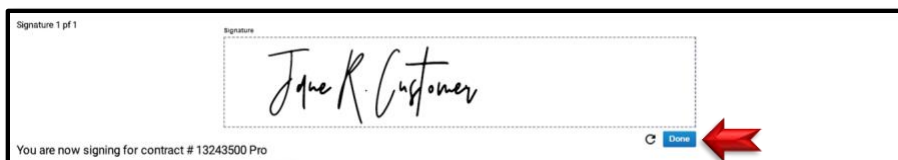
25. The signature screen is displayed with the Customer Signature box at the top and the Contract below. The Customer may sign within the Customer Signature Box using the mouse.



The screenshot shows the signature screen. At the top, there is a large red rectangular box for the signature. Below it, the text 'You are now signing for contract # 13243500 Pro' is displayed. Below the text is a blue button labeled 'Done'. Below the signature box is a contract form titled 'APEX VEHICLE SERVICE AGREEMENT' with contract number 13243500. The form includes sections for 'DECLARATIONS', 'APPLICANT INFORMATION', and 'SELLER INFORMATION'. The 'APPLICANT INFORMATION' section contains the following details:

APPLICANT INFORMATION	
PURCHASER NAME	Jane R. Customer
PHONE	(111) 234-5555
EMAIL ADDRESS	j.customer@gmail.com
MAILING ADDRESS	1022 Customer Drive
CITY	Deerfield
STATE	IL
ZIP CODE	60015

26. Once your Customer has signed, the **Done** button will activate. 'Click' the **Done** button to accept the eSignature.

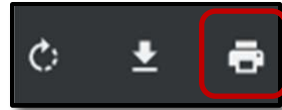


The screenshot shows the signature screen with the signature 'Jane R. Customer' written in the signature box. Below the signature box, the text 'You are now signing for contract # 13243500 Pro' is displayed. Below the text is a blue button labeled 'Done' with a red arrow pointing to it.

27. 'Click' the **View and Close** button to open an additional Tab displaying the completed contract with eSignature for printing.

**View and Close**

28. '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

29. After all copies of the contract have been printed, exit out of the contract Tab.

30. If you have additional contracts to enter, 'Click' the **New Contract** button.



31. If you have no additional contracts to add, 'Click' the **Close** button.



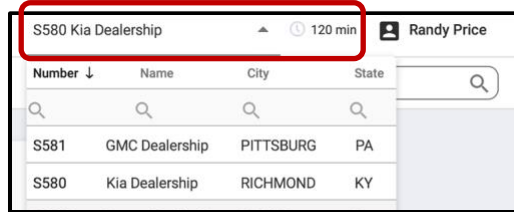
**NOTES:**

# QUICK RATER

The Quick Rater function of the PCRS 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.

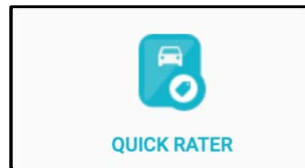
## Quick Rater

1. If you have multiple rooftops in your system, verify that you have the desired Dealer selected and displaying on the PCRS Homepage.

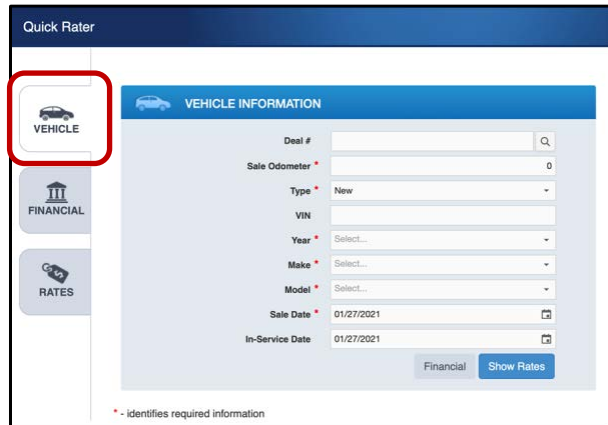


Number ↓	Name	City	State
S581	GMC Dealership	PITTSBURG	PA
S580	Kia Dealership	RICHMOND	KY

2. Select the **Quick Rater** link to begin rating a contract.



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



Quick Rater

VEHICLE INFORMATION

Deal # [ ]

Sale Odometer \* [0]

Type \* [New]

VIN [ ]

Year \* [Select...]

Make \* [Select...]

Model \* [Select...]

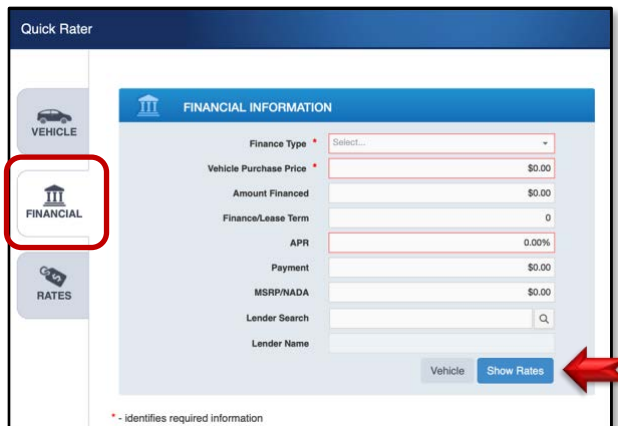
Sale Date \* [01/27/2021]

In-Service Date [01/27/2021]

Financial [ ] Show Rates

\* - identifies required information

4. 'Click' the **Financial Tab** and enter the required \* information on the Financial Information screen.



Quick Rater

FINANCIAL INFORMATION

Finance Type \* [Select...]

Vehicle Purchase Price \* [\$0.00]

Amount Financed [\$0.00]

Finance/Lease Term [0]

APR [0.00%]

Payment [\$0.00]

MSRP/NADA [\$0.00]

Lender Search [ ]

Lender Name [ ]

Vehicle [ ] Show Rates

\* - identifies required information

5. 'Click' **Show Rates** after the Vehicle and Financial information has been entered to display rates for

- Quick Rater will display the eligible coverages for the vehicle, grouped by product.



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



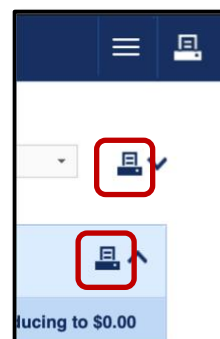
To restore the cart, simply 'Click' the cart icon in the lower right corner of your screen.



- '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.

Quick Rater

2021 GMC Sierra 2500HD AT4 1GT49PEY2MF168109  
Sale Odometer 13 Sale Date 01/27/2021

Product Type All

VEHICLE

FINANCIAL

RATES

Apex 2.0 Pro

Terms	Deductibles	\$0.00 Per Repair	\$100.00 Per Repair	\$200.00 Per Repair	\$100.00 Reducing to \$0.00
12/12,000		\$941.00	\$741.00	\$666.00	\$916.00
12/15,000		\$951.00	\$751.00	\$676.00	\$926.00
12/25,000		\$970.00	\$770.00	\$695.00	\$945.00
24/25,000		\$993.00	\$793.00	\$718.00	\$968.00

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.

Apex 2.0 Pro

12/15,000, \$100.00 Reducing to \$0.00 \$926.00

Additional Paid Options:

- ☐ Commercial \$350.00
- ☒ Diesel
- ☐ Lift Kit \$400.00
- ☒ Turbo/Supercharger
- ☒ 4x4/AWD

Add to Selected Close

11. 'Click' **Add to Selected** to add the coverage and options to the cart.

Add to Selected

12. 'Click' **Close** to close the details pop-up and view/select another coverage.

Close

13. Continue until all coverage(s) have been selected and added to the cart.

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



14. 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.

If you wish to remove a coverage 'Click' the trash can to remove from your cart.

'Click' to continue with the selected coverage(s) to finish entering the customer details.



15. Complete the contract entry process by adding the required \* Customer information for all fields on the **Customer Information** screen. Vehicle and Financial information are carried forward from the previous screen.

16. To view completed sample contract, 'Click' **Print Preview**



17. 'Click' **Finish** submit the contract



**NOTES:**

# QUOTES

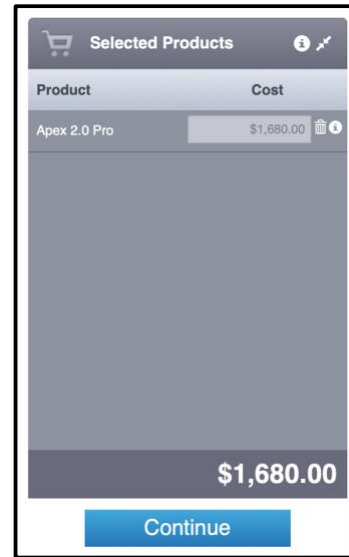
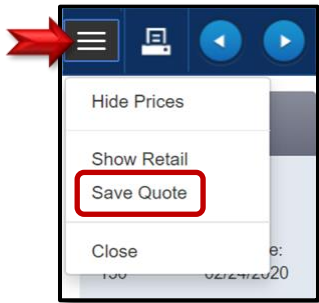
If the customer is not ready to complete the vehicle and coverage purchase, we provide the option to save the quote and retrieve it later.

## Create & 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, then 'Click' the **Save Quote** option to proceed.



3. The **Save Quote** screen will display. Fill in the following information:
  - a. **Deal #** (although not required, it is needed for later searches of Saved Quotes).
  - b. **Last Name** (*required \**).

Complete any additional information fields you choose.

A screenshot of a 'Save Quote' form. It contains four input fields: 'Deal #', 'First Name', 'Last Name' (marked with a red asterisk), and 'Comment'. At the bottom right, there are two buttons: 'Cancel' and 'Save'.

Deal # is not a required field, but necessary to allow you to search for the saved quote!

4. 'Click' **Save** when all information has been entered.



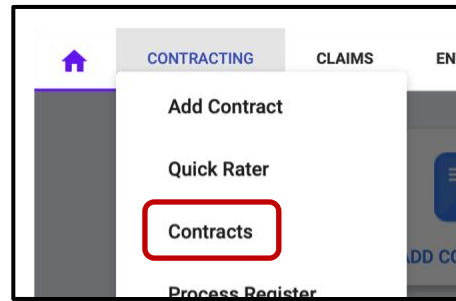
**NOTES:**

# SEARCH & VIEW COMPLETED CONTRACTS

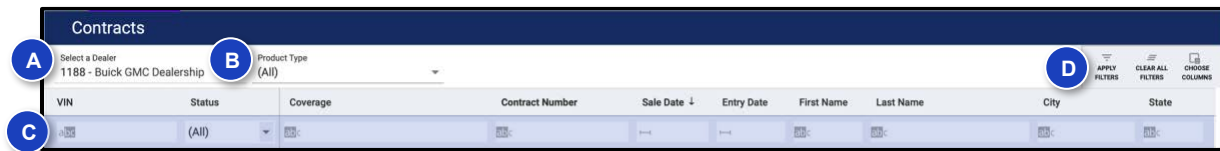
## Search Contracts

The PCRS Dealer Portal provides viewing of your completed contracts. Contracts can be searched and viewed regardless of contract status.

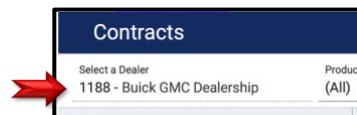
1. Select **Contracting** in the top navigation menu, then select **Contracts**.



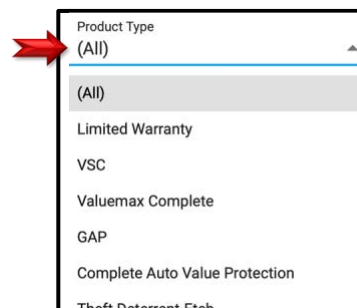
2. The **Contracts** screen will open showing multiple search fields available to view contracts. Several options exist to allow you to filter and display Contracts specific to your viewing requirements.



- A Select a Dealer:**  
Search and select a Dealer from the main Contract screen. *(This may be auto populated for you or it may not be visible based on setup).*



- B Product Type:**  
Filter your view by selecting a coverage type from the drop-down menu.



VIN	Status	Coverage	Contract Number	Sale Date ↓	Entry Date	First Name	Last Name	City	State
	(All)								



### Search & Filtering Options:

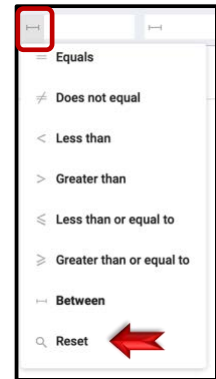
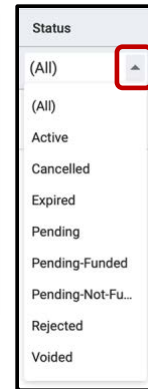
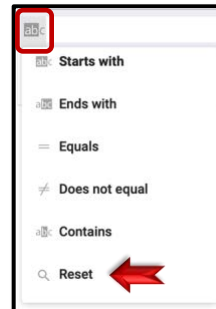
The following filter options are available to help refine your search view:

- VIN
- Status
- Coverage
- Contract Number
- Sales Date
- Entry Date
- First Name
- Last Name
- City
- State

Interactive additional filtering options are available under each main search filter above, and can be accessed by selecting **abc** (text filter) or (dropdown arrow).

- a. **abc Text Filter:** 'Click' to view options, then select, or type directly into the search field. Use the **Reset** option to clear search criteria.

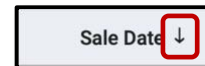
- b. **Dropdown Arrow:** 'Click' to view filter choices available to filter by, then select.



- c. **Range Filter:** 'Click' to view options for search criteria based on a range including dates.

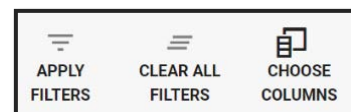
Clicking directly in the search field provides a calendar with selectable dates. Use the **Reset** option to clear search criteria.

Ascending/Descending column sort available when an arrow exists to the right of the column name.



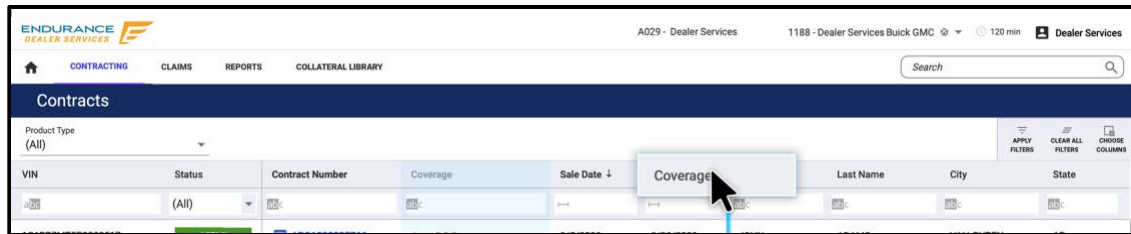
### Filter Actions:

- a. **Apply Filters:** After you have selected the desired filters above, 'Click' Apply Filters to view filtered Contract screen.
- b. **Clear All Filters:** Select to remove all filter selections from the **Contract** screen.
- c. **Choose Columns:** Allows you to add/remove columns from view on the **Contract** screen.



## Custom Column Viewing

With our enhanced screen functionality, PCRS provides the option to arrange column viewing based on your user login.

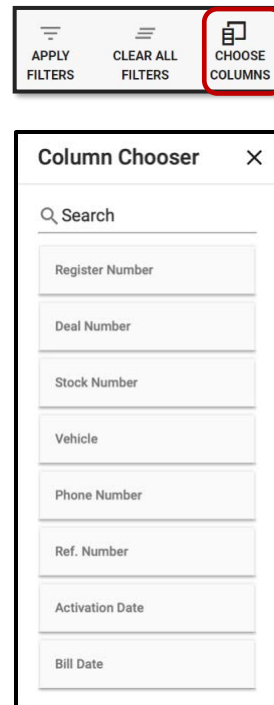


1. To move or re-arrange columns, simply left click your mouse over the top of a column, then drag and drop it to your desired location.
2. Release the mouse to place the selected column in the new location on the screen.

## Add or Remove Columns

PCRS provides the ability to add or remove Columns quickly from view using the **Choose Columns** option.

1. Select the **Choose Columns** button to open the pop-up **Column Chooser** window to select columns from the list or use the search field to find a desired column by name.
2. **To Add a Column:** Left click the Name of the column you wish to add and drag it to the desired location.
3. **To Remove a Column:** Left click on the column Heading in your Contract view and drag it back to the **Column Chooser** pop-up window at the bottom right corner of the screen to remove it from view.
4. Columns that you add or remove from view are specific to your login profile. Now, when you log back in, your screen view will remain exactly as you left it when you logged out.

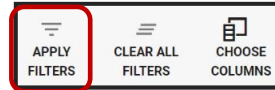


Not all columns are available to rearrange, add, or remove. In most instances the first two left side columns may be static and cannot be changed.

## View Completed Contracts

The Contracts view provides an overview of completed Contracts and can be filtered based on the Products selected, and the many other search and filtering options (reviewed above) you select.

1. Once you have made your selections and 'clicked' **Apply Filters**, the Contract screen will populate based on the filters applied.



Contracts

Select a Dealer


1188 - Dealer Services Buick GMC

Product Type

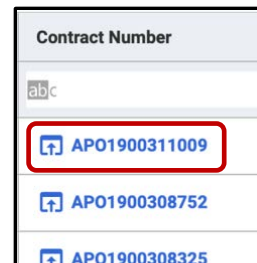
VSC

VIN	Status	Contract Number	Coverage	Sale Date ↓	Entry Date	First Name	Last Name	City
<div><div></div><div></div></div>	(All)	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>
1GKKNP1S9KZ266619	ACTIVE	<div><div></div><div>APO1900311009</div></div>	Apex 2.0 Pro	7/6/2020	8/30/2020	JAMES	WRIGHT	EL
1GKS2BK09LR263985	ACTIVE	<div><div></div><div>APO1900308752</div></div>	Apex 2.0 Pro	6/30/2020	8/30/2020	WALTER	SMITH	BR
1GT49LE73LF158445	ACTIVE	<div><div></div><div>APO1900308325</div></div>	Apex 2.0 Pro	6/29/2020	8/30/2020	JOSE	GONZALEZ	TU
3GCUKSEC9HG465426	ACTIVE	<div><div></div><div>ASP1900307669</div></div>	Apex 2.0 Select Plus	6/27/2020	8/30/2020	TIMOTHY	BROWDON	GA
5GAEVCKVW8K1195273	ACTIVE	<div><div></div><div>APO1900305921</div></div>	Apex 2.0 Pro	6/23/2020	8/30/2020	ANDREW	WINTHROP	ED

2. To view a displayed Contract, 'click' on the Contract Number.

The  icon indicates that the selected Contract will open in the **current** browser window.

To open in a **separate** browser window, use  .



3. Once the desired Contract link is selected, the Contract details will display.

← CONTRACT: APO1900311009

ACTIVE

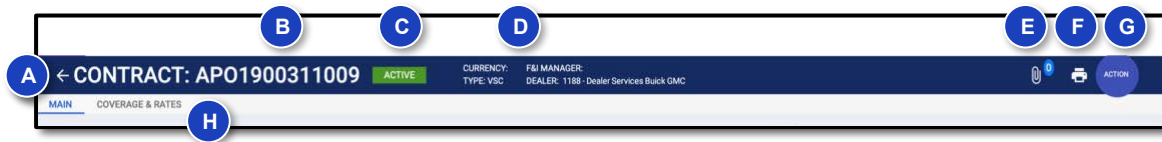
CURRENCY: US\$

TYPE: VSC

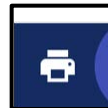
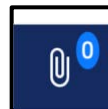
1188 - Dealer Services Buick GMC

<b>General</b> Contract Number * APO1900311009 Sale Date 07/06/2020 In Service Date 07/06/2020 Effective Date 07/06/2020 Expiration Date 08/30/2020 Bill Date 08/30/2020 Sale Odometer 12,967 Effective Odometer 12,967 Expiration Odometer 112,967				<b>Vehicle Information</b> VIN 1GKKNP1S9KZ266619 Vehicle Age Type * Pre-owned Year * 2019 Make * GMC Model * ACADIA DENALI Nitrogen Installed <input type="checkbox"/> Color	
<b>Buyer Information</b> CUSTOMER CO-BUYER First Name * WALTER Last Name * SMITH Primary Phone (405) 11101234 Ext. Secondary Phone Ext. Email w.smith@myemail.com Address 1 300 SE WEST ST Address 2 Country United States Zip Code 43341 City BRYAN State TX Language English - United States					
<b>Coverage Information</b> Coverage * APEX 2.0 PRO HEV BATTERY - Apex 2.0 Pro Rate Book - Term * 60/100,000 \$100.00 Reducing to Class * 4 Tier * Insurance Company WIC - WESCO Insurance Company			<b>Financial Information</b> Finance Type Vehicle Purchase Price \$34,156.00 Amount Financed \$0.00 MSRP/Mailbox \$0.00 Payment Frequency Monthly Payment \$0.00 Balloon Amount \$0.00 First Payment Date Total Payments \$0.00 Term 0 APR 0.00% Account Number Lender		
<b>Claims</b> Status Claim # ID # Service Dates Services ID Date Correction Activity Total Pending Total Paid					

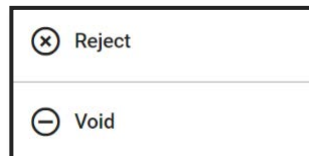
4. The Contract Header displays information and options available for the selected Contract.



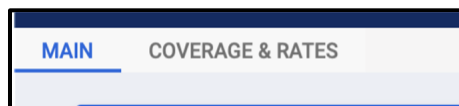
- A Return/Back:** This arrow will return you to the Contract screen.
- B Contract Number:** The number of the Contract being viewed.
- C Contract Status:** The status of the Contract being viewed.
- D Contract Information:** Displays Currency, F&I Manager (if applied), Coverage Type, and Dealer Number and Name.
- E Documents:** Provides the ability to attach documents to the Contract via upload or link. A count of documents attached is displayed next to the paper clip icon.
- F Print:** Provides the option to Print the current Contract.
- G Action:** Allows various options and status changes to be performed on an existing Contract. Click the Action button to display a dropdown list of options available:



- **Cancel Active Contract**
- **Reject Pending Contract**
- **Void Pending Contract**



- H Contract Navigation Tabs:** Select **MAIN** to view Contract information or **COVERAGE & RATES** to view rate details of the Contract. The current view will be displayed in **BLUE** text.

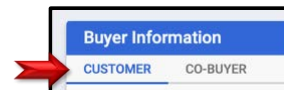


5. **Main Contract View:** The Main Contract View screen provides the ability to view and edit the selected Contract in a segmented view.

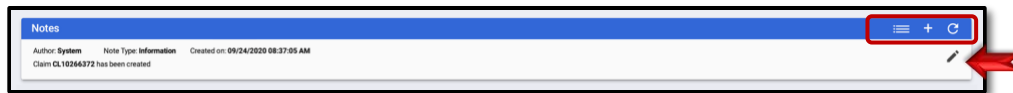
The screenshot displays the Main Contract View screen with the following sections:


- General (A):** Contract Number \* APO1900311009, Reference, Deal #, Stock #, Balance \$0.00, Sale Date 07/06/2020, In-Service Date 07/06/2020, Effective Date 07/06/2020, Expiration Date 07/06/2025, Billed Date 08/30/2020, Sale Odometer 12,967, Effective Odometer 12,967, Expiration Odometer 112,967.
- Vehicle Information (B):** VIN 1GKKNP1S9KZ266619, Vehicle Age Type \* Pre-owned, Year \* 2019, Make \* GMC, Model \* ACADIA DENALI, Nitrogen Installed ☐, Color.
- Buyer Information (C):** CUSTOMER CO-BUYER, First Name \* WALTER, Last Name \* SMITH, Primary Phone (405) 11101234, Ext., Secondary Phone ( ) , Ext., Email w.smith@myemail.com, Address 1 \* 300 SE. WEST ST, Address 2, Country United States, Zip Code \* 65341, City \* BRYAN, State \* TX, Language English - United States.
- Coverage Information (D):** Coverage \* APEX 2.0 PRO HEV BATTERY - Apex 2.0 Pro, Rate Book -, Term \* 60/100,000 \$100.00 Reducing to, Class \* 4, Tier \*, Insurance Company WIC - WESCO Insurance Company.
- Financial Information (E):** Finance Type, Vehicle Purchase Price \$34,156.00, Amount Financed \$0.00, MSRP/INADA \$0.00, Payment Frequency Monthly, Payment \$0.00, Balloon Amount \$0.00, First Payment Date, Total Payments \$0.00, Term 0, APR 0.00%, Account Number, Lender.
- Notes (F):** Author: System, Note Type: Information, Created on: 09/24/2020 08:37:05 AM, Claim CL10266372 has been created.
- Claims (G):** Status, Claim #, RO #, Service Odom, Services, RO Date, Correction, Activity, Total Pending, Total Paid. Example: PAID, CL10266372, 22000, 63,735, Fuel/Air - VSC - F., 09/24/2020, Fuel level sensor..., Payment Issued, -, \$1,766.37.

- A General:** Provides the main details of the Contract being viewed. Select the to open the section and edit.
- B Vehicle Information:** Provides the Vehicle information decoded from the related VIN. Select the to open the section and edit.
- C Buyer Information:** Displays the Buyer and Co-Buyer information. Toggle between Buyer and Co-Buyer by selecting the CUSTOMER or CO-BUYER link view. The current view will be displayed in **BLUE** text. Select the to open the section and edit.
- 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. Select the to open the section and edit.



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



- a. **Edit/View Existing Note(s):** Select the  to view or edit an existing Note line. (The ability to edit notes is controlled by User Permissions.)



- b. **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**.



VIN - WAUKGAFL6EA079653

Refresh Clear All Fields

CONTRACT #	CLAIM #	PRODUCT TYPE	NOTE TYPE	NOTE	ENTERED TIME	ENTERED BY
VSC10111444	CL10213853	VSC	Information	Authorization Changed: CBK AUTO PARTS - Total Authorized \$341.25 - Last Auth # 129255.	04/08/2020 08:17:22 AM	Mark Nagelvoort
VSC10111444	CL10213853	VSC	Information	Authorization Changed: Bitterroot Motors - Total Authorized \$201.81 - Last Auth # 129254.	04/08/2020 08:17:22 AM	Mark Nagelvoort
VSC10111444	CL10213853	VSC	Information	Claim status changed from Pending to Authorized.	04/08/2020 08:17:22 AM	Mark Nagelvoort
VSC10111444	CL10213853	VSC	Information	Part E33 ordered from CBK AUTO PARTS was deleted.	04/08/2020 08:12:52 AM	Mark Nagelvoort
VSC10111444	CL10213853	VSC	Information	Part E33 ordered from CBK AUTO PARTS was deleted.	04/08/2020 08:11:28 AM	Mark Nagelvoort
VSC10111440	CL10214514	VSC	Information	Claim status changed to Paid.	04/07/2020 11:19:37 AM	System

- c. **Add Note/Claim Alert:** Add a new Note/Claim Alert by selecting the Add button. Enter the desired Note or set the desired Claim Alert then select **ADD NOTE** to save and close.
- d. **Refresh Notes View:** You can refresh the notes preview window at any time by selecting the **Refresh** button.

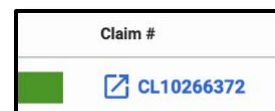


- G Claim History:** Claim history is available to view on the **Contract View** screen when the **General** view is selected. View the status and details of current or past Claims associated with this Contract.

Claims

Status	Claim #	RO #	Service Odsm	Services	RO Date	Correction	Activity	Total Pending	Total Paid
PAID	<a href="#">CL10266372</a>	22000	63,735	Fuel/Air - VSC - F...	09/24/2020	Fuel level sensor...	Payment Issued	-	\$1,766.37

- a. **Claim #:** To view the details of a displayed Claim, select the **Claim Number** link. The Claim Screen will open in a new browser tab.



- b. **Add Claim:** Add/Start a new Claim by selecting the Add button. The Add New Claim Screen will open in a new browser tab. *This screen is permissions based. Please contact your Agent for additional details.*



Step 1 - Start New Claim/Redemption

You don't have permission to add claim

Search for Contract

Enter a full Contract Number or VIN (at least the last 6 digits)  
Using Customer Last Name with the VIN will narrow down the results:

Contract Number

OR

Last 6 or more of VIN

Customer Last Name

Close

- c. **Refresh Claims History:** You can refresh the Claims History preview window at any time by selecting the **Refresh** button.



- Coverage & Rates View:** The **Coverage & Rates View** screen provides additional information about the selected Contract that is not shown by **Main View**.



Select the **Coverage & Rates** link on the **Contract** view screen. The current view will be displayed in **BLUE** text.

The screen will refresh, and these additional sections will be displayed:

- a. **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
<input type="checkbox"/>	Commercial	Commercial	\$0.00
<input type="checkbox"/>	Lift Kit	Lift Kit	\$0.00
<input type="checkbox"/>	Salvage/Rebuilt	Salvage/Rebuilt	\$0.00
<input checked="" type="checkbox"/>	4x4/AWD	4x4/AWD	\$100.00
<input checked="" type="checkbox"/>	Diesel	Diesel	\$250.00
<input type="checkbox"/>	Hybrid	Hybrid	\$0.00
<input checked="" type="checkbox"/>	Turbo/Supercharger	Turbo/Supercharger	\$100.00

**b. 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
DROVERREMIT	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	\$1,500.00	\$0.00	\$1,500.00	
+	Calculated Dealer Pack	\$0.00	\$0.00	\$0.00	
=	Dealer Cost	\$1,500.00	\$0.00	\$1,500.00	
+	F&I Markup	\$1,300.00	\$0.00	\$1,300.00	
=	Retail	\$2,800.00	\$0.00	\$2,800.00	

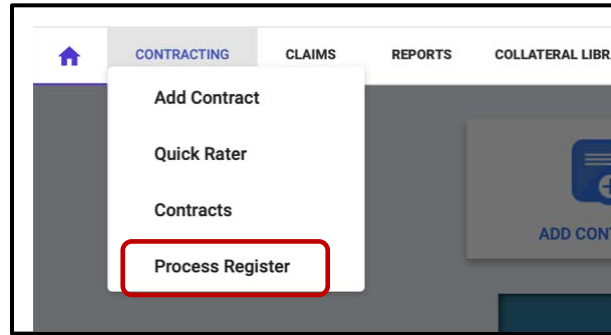


Due to the on-going development of PCRS, not all menu/sub-menu options or screens may be currently available.

## Process Register

PCRS provides access to the **Process Register**. Currently, the **Process Register** is limited to use with the payment type of Check. Additional payment types will be made available in future releases.

1. Select **Contracting** in the top navigation menu, then select **Process Register**.



2. The **Process Register** screen will display. Select a Dealer from the main Process Register screen (*this may be auto populated for you or it may not be visible based on setup*) and apply your filters to display Contracts available for remittance.

**Process Register**

Page: 1188 - Dealer Services Buil... Product Type: (All)

**CONTRACTS 292**

To Pay	Funded	Contract #	Dealer #	Stock #	BtSaleDate	First Name	Last Name	VIN Suffix	Coverage	Due Amount	Trans. Details
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	WIN00388451	93202		01/21/2021	PATRICK	NASH	168109	Windshield Repair & Replace 36 Months	\$0.00	
<input type="checkbox"/>	<input type="checkbox"/>	VM400388287	93191		01/20/2021	MICAH	KING	176524	ValueMax Level 4	\$0.00	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	KEY00388542	93204		01/21/2021	ROBERT	WIEDEMANN	005120	Key Replacement	\$0.00	
<input type="checkbox"/>	<input type="checkbox"/>	GAP1900388569	93207		01/21/2021	KOREY	UPTON	207678	150% GAP	\$0.00	
<input type="checkbox"/>	<input type="checkbox"/>	GAP1900388217	93007		01/20/2021	MICHAEL	HARRIS	907336	150% GAP	\$0.00	
<input type="checkbox"/>	<input type="checkbox"/>	CAV00388452	93202		01/21/2021	PATRICK	NASH	168109	Complete Auto Value Protection	\$0.00	
<input type="checkbox"/>	<input type="checkbox"/>	CAV00388396	93200		01/21/2021	NANCY	KOBAN	171834	Complete Auto Value Protection	\$0.00	
<input type="checkbox"/>	<input type="checkbox"/>	AP01900388570	93207		01/21/2021	KOREY	UPTON	207678	Apex 2.0 Pro	\$0.00	
<input type="checkbox"/>	<input type="checkbox"/>	AP01900388541	93204		01/21/2021	ROBERT	WIEDEMANN	005120	Apex 2.0 Pro	\$0.00	

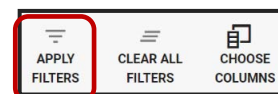
Page 1 of 15 (292 Items)

**Summary:** CONTRACTS 2 | \$2,272.60 CLAIMS 0 | \$0.00 OTHER 0 | \$0.00 TOTAL 2 | \$2,272.60

**Buttons:** APPLY, CLEAR ALL FILTERS, CHOOSE COLUMNS, PAY

- A** Select a **Dealer** from the **Dealer** list. (*This may be auto populated for you or it may not be visible based on setup*).


- B** Select filters for your search, then 'Click' **APPLY FILTERS**.



- C** Select the **Contracts** you wish to remit by 'Clicking' the checkboxes.

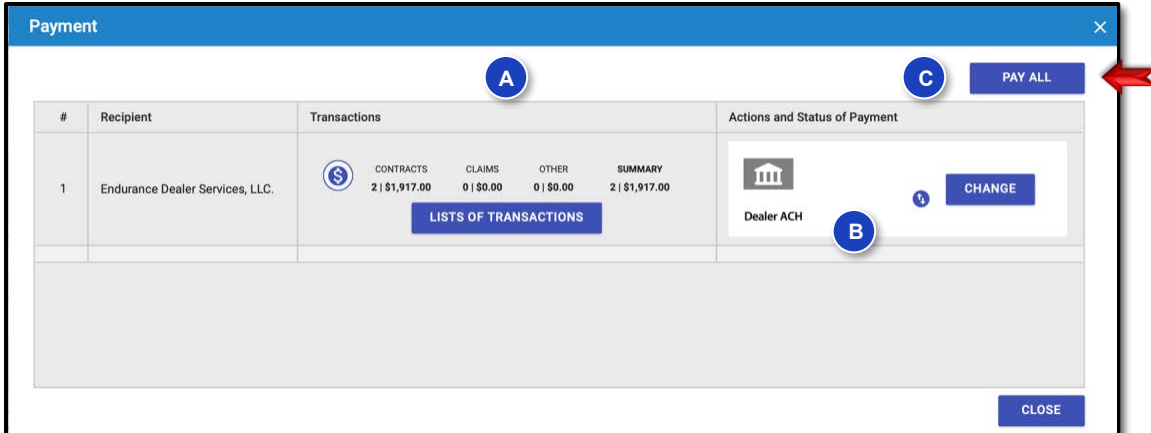
To Pay	Funded	Contract #	Dealer #
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	WIN00388451	93202
<input type="checkbox"/>	<input type="checkbox"/>	VM400388287	93191
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	KEY00388542	93204

- D** Review selected Contract count and totals to pay for accuracy.

	CONTRACTS 2   \$2,272.60	CLAIMS 0   \$0.00	OTHER 0   \$0.00	TOTAL 2   \$2,272.60	<b>PAY</b>
---	-----------------------------	----------------------	---------------------	-------------------------	------------

- E** Select **Pay** to proceed to the **Payment** screen.

3. The **Payment** screen of the **Process Register** will display each **Recipient**, **Transactions**, and **Actions and Status of Payment** for your review.



- A** Review all **Transactions** for accuracy.
- B** Review **Action and Status of Payment** section for correct payment type. Use the **CHANGE** button to choose the payment type (ACH or Check).
- B** 'Click' the **PAY ALL** button to remit displayed transactions.

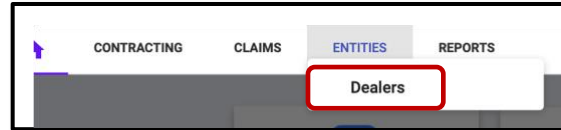
PCRS will generate the extract report (RPT200) of remitted contracts.

**NOTES:**

# SEARCH DEALER

The **Dealers** screen allows you to view basic information about a Dealership. If any of this information is incorrect, please contact your representative. (The **ENTITIES** tab, and **Dealers** dropdown, may not be visible based on setup).

1. If your system has the **ENTITIES** navigation tab, 'Click' on it to access a list of **Dealers**, under its dropdown menu.



2. 'Click' any search window and type the % symbol, then your ENTER key, to populate the list.

Number	Name	Group Names	City	State	Phone Number
<input type="text" value=""/>	<input type="text" value=""/>	(All)	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>

3. 'Click' a Dealer Number to view the Dealer Profile screen.



4. The **Dealer Profile** screen will open in a new Tab. If any of the information displayed is incorrect, please contact your Sales Representative.

Edit Dealer 1991 - Dealer Services
Reports

DEALER PROFILE

Name: Dealer Services Buick GMC
Status: Active
Alt. Name: NULL
Activation Date: 09/13/2017
Termination Date:
Association Code: NUL

Fed Tax ID: \*\*\*\*\*000
Refund Pay Method: Check
Claim Pay Method: Credit Card (WEX)
Contract Pay Method: via Register
Credit Payment Notify By: None
Default Inspection Co.:

Rates Profile: 1991 Dealer Services Bl
Reference Number:

EXTERNAL SYSTEM	NUMBER	USER	CAN PULL DEAL	ENABLE DEALS LOAD
			<input type="checkbox"/>	<input type="checkbox"/>

Main
Notes
Contacts

Dealer Location
Country: United States
Address 1: 400 SKOKIE BLVD.
Address 2:
Postal Code: 60062
State: IL
City: NORTHBROOK

Billing Address
Country: United States
Address 1: 400 SKOKIE BLVD.
Address 2:
Postal Code: 60062
State: IL
City: NORTHBROOK

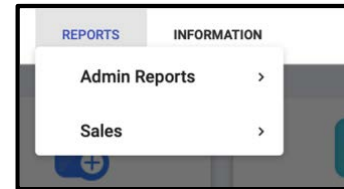
Contact Information
Contact First Name:
Contact Last Name:
Website:
Business Phone: (877) 414-0134
Fax: (877) 728-1111
Email: dealerservices@endurancecs.com

**NOTES:**

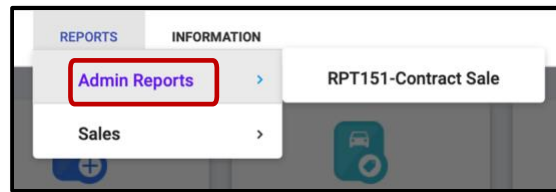
# REPORTING

Various Sales, Admin and Claim reports are available through the Dealer Portal. Available reports are based on the permissions assigned to you. Please contact your Agent for additional details.

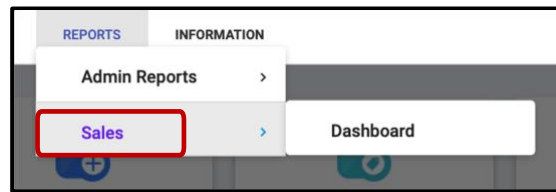
1. The **REPORTING** tab is part of the top navigation and offers cascading additional options when 'Clicked'.



2. The **Admin Reports** tab provides Contract Sales and other reports, *as available based on your Permissions settings*.



3. The **Sales Reports** tab includes access to the **Sales Dashboard** and other reports, *as available based on your Permissions settings*.



4. The **Sales Dashboard** includes filterable information and views of Monthly Sales, YTD Sales, Charts for Contract Sales Comparison, Pending Contracts, and Contracts per Coverage Type, F&I Manager Activity details and more.



## Reporting Parameter Screens

For each report a screen will open where you are able to specify the parameters you wish to display. All parameters need to be defined to view the report. Additional or different options will appear based on the report you choose.

The screenshot shows a reporting parameter screen with the following fields and labels:

- A** Country: United States
- B** Dealer Group Type: ALL
- C** Dealer: ALL
- D** Date To: (empty)
- E** Details: No
- F** State/Prov.: ALL
- G** Dealer Group: ALL
- H** Date From: <Select a Value>
- I** F&I Manager: ALL
- J** Contracts By: <Select a Value>
- K** View Report (button)
- Export CSV (button)

**A** **Country:** Defaults to the United States

**B** **Dealer Group Type:** Select the type of Dealer Group from the dropdown list. *(This may be auto populated for you or it may not be visible based on setup).*

**C** **Dealer:** Select a Dealer name from the dropdown list. *(This may be auto populated for you or it may not be visible based on setup).*

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

The close-up shows the 'Dealer Group Type' dropdown menu with the following options:

- 2ND CHANCE
- ALL (selected)
- CATEGORY
- CHANNEL
- COMPANY
- DEALER/AGENT SUB
- DEMO
- DIVISION
- DUPLICATE
- OEM
- PRINCIPAL
- REGION



**\*\*Date From** must be selected **FIRST** for the **Date To** field to populate.

**E** **Details:**

- Yes** - will display contract level detail supporting the summary level data.
- No** - will display summary level data only.

**F** **State:** Select a State from the dropdown list.

**G** **Dealer Group:** Select a Dealer Group name from the dropdown list. *(This may be auto populated for you or it may not be visible based on setup).*

**H 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.

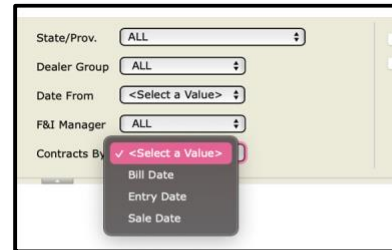
**I F&I Manager:** If you track which F&I Manager sold the contract, select the appropriate F&I Manager. If you do not track, select "ALL".

**J Contracts By:**

a. **Bill Date** (*recommended value*) – Date the TPA received funds for the contract.

b. **Entry Date** – Date the contract was entered into the PCRS system.

c. **Sale Date** – Effective date of the contract.

A screenshot of a web application interface showing a form with several dropdown menus. The 'Contracts By' dropdown is open, displaying three options: 'Bill Date' (selected with a checkmark), 'Entry Date', and 'Sale Date'. The other dropdowns in the form are set to 'ALL' or '<Select a Value>'. The form is titled 'State/Prov.' and 'Dealer Group'.

**K View Report:** When all parameters have been entered, 'Click' **View Report** to run the report.

a. **Export CSV** – Report can also be saved as a CSV file.

A screenshot of a web application interface showing two buttons: 'View Report' and 'Export CSV'. Two red arrows point to each button, indicating they are clickable.

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.

## RPT603 – Sales Summary:

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.

(Located under the **REPORTS** navigation tab > Sales > RPT603-Sales Summary)

## RPT603 - Sales Summary

Report Period: 04/01/2019 - 02/28/2021  
 State/Prov.: ALL  
 Dealer Group: ALL  
 Dealer: TEST DEALER 2  
 F&I Manager: ALL  
 User: Agent Demo  
 Contracts By: Sale Date

A

### Account Balance Summary

4/1/2019 - 2/28/2021 Total

Report Group	Gross Contract Count	Dealer Net Rate	Retail
Complete Auto Value Protection (Bundle)	1	\$243.00	\$293.00
Guaranteed Asset Protection	2	\$684.00	\$1,187.00
VSC	2	\$3,438.00	\$4,890.00
<b>Total</b>	<b>5</b>	<b>\$4,365.00</b>	<b>\$6,370.00</b>
		<b>Up Front Profit</b>	<b>\$2,005.00</b>

B

### Fiscal Year to Date - Total

1/1/2021 - 2/28/2021 Total

Report Group	Gross Contract Count	Dealer Net Rate	Retail
Complete Auto Value Protection (Bundle)	1	\$243.00	\$293.00
Guaranteed Asset Protection	2	\$684.00	\$1,187.00
VSC	2	\$3,438.00	\$4,890.00
<b>Total</b>	<b>5</b>	<b>\$4,365.00</b>	<b>\$6,370.00</b>
		<b>Up Front Profit</b>	<b>\$2,005.00</b>

**A Account Balance:** Shows a summary of sales data for the range specified in the **Date From** and **Date To** fields.

**B 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.

## RPT151 – Contract Sale:

Provides all contract sales within the given parameters sorted by dealer. Allows for reporting by a specific date range or by entire months.

(Located under the **REPORTS** navigation tab > Admin Reports > RPT151-Contract Sale)

RPT151 - Contract Sale

Agent:Demo Agent

Country:United States

State:ALL

Dealer:TEST DEALER 2

Report Period:1/1/2021 - 2/28/2021

Dealer	Contract Number	Contract Status	F&I Manager Name	Entry Date	Sale Date	Deal #	Customer Name	Coverage	VIN	Vehicle Information	Net Rate	Rebate	Markup	Retail
TEST DEALER 2 600 SKOKIE BLVD NORTHBROOK, IL - 60062	AP00051377	Active		2/13/2021	02/13/2021		TEST TEST	Apex 2.0 Pro 60 Months	JN1BJCV4LW551961	2020 NISSAN Rogue Sport S	\$1,490.00	\$1,490.00	\$0.00	\$1,895.00
	CAVF0001001	Active		2/13/2021	02/13/2021		TEST TEST	Complete Auto Value Protection 48 Months	JN1BJCV4LW551961	2020 NISSAN Rogue Sport S	\$243.00	\$243.00	\$0.00	\$293.00
	G200001014	Active		2/13/2021	02/13/2021		TEST TEST	15% FRANCHISE GAP 48 Months	JN1BJCV4LW551961	2020 NISSAN Rogue Sport S	\$342.00	\$342.00	\$0.00	\$392.00
	G200001015	Pending		2/13/2021	02/13/2021		test test	15% FRANCHISE GAP 60 Months	JFAP00076R279489	2015 FORD Fusion SE	\$342.00	\$0.00	\$403.00	\$795.00
	VMS0051400	Pending		2/13/2021	02/13/2021		test test	ValueMax Level 4 36 Months	JFAP00076R279489	2015 FORD Fusion SE	\$1,348.00	\$0.00	\$642.00	\$2,995.00
Total For TEST DEALER 2											\$4,365.00	\$2,075.00	\$1,045.00	\$6,370.00

Confidential Data

Page 1 of 1

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The following data populates based on the report parameters specified:

1. **Gross Contract Count:** Number of contracts, not accounting for cancellations.
2. **Dealer Net Rate:** Total Dealer cost.
3. **Retail:** Total retail price paid by the end customer for the contract.
4. **Up Front Profit:** Contract Retail price *less* Dealer Net Rate.
5. **Review Report Detail:** If the report is run *with* Details, contract detail is populated to support the summary data.
6. **Tran Type:** NB is 'New Business' which is any net new contract accepted by Endurance DS; 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).
7. **Contract Number:** Identification number of the customer's contract.
8. **VIN:** Vehicle VIN Number covered by the contract.
9. **New / Used:** Indicates if the covered vehicle is new (N) or used (U).
10. **Contract Sale Date:** The contract's effective date.
11. **Customer Last Name:** Last name(s) of the individual(s) covered on the contract.
12. **Coverage:** Name and form number of the customer's coverage.
13. **Term/Deduct:** Term (months) and the claim deductible for the contract.
14. **Dealer Net Rate:** The dealer cost of the contract.
15. **Retail:** The retail price the customer paid for the contract.



Details can only be pulled if a single month is selected in the **Date From** and **Date To** fields.

## RPT200 – Sales Register Processed

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.

(See pages 35-36 in this Guide for steps leading to RTP200 creation. Once the remittance process has been completed, RPT-200 will display in a separate tab)

RPT200 - Sale Register Processed Report

Dealer	TEST DEALER 2 - TESRDEALER2	REGISTER	BANK		CHECK	
Payee	Endurance Dealer Services, LLC. 400 SKOKIE BLVD, SUITE 105, NORTHBROOK, IL 60062	Register #	R20210215-11269895		Bank Name	CIBC
		Register Date	2/15/2021		Account Number	6020441
				Check Number		
				Check Amount Due	\$3,753.00	

	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	VMN0051400		2/13/2021	TEST TEST ValueMax Level 4	3FA6P0H76FR279489 2015 FORD Fusion SE	\$2,995.00	\$0.00	\$1,948.00	\$1,948.00	\$2,353.00	\$0.00	\$0.00	\$1,948.00
2	G200001015		2/13/2021	TEST TEST 150% FRANCHISE GAP	3FA6P0H76FR279489 2015 FORD Fusion SE	\$795.00	\$0.00	\$342.00	\$342.00	\$392.00	\$0.00	\$0.00	\$342.00
3	APR0051511		2/15/2021	JOHN TEST Apex 2.0 Premier		\$2,500.00	\$0.00	\$1,463.00	\$1,463.00	\$1,868.00	\$0.00	\$0.00	\$1,463.00
Contracts Count:			3				\$0.00	\$3,753.00	\$3,753.00	\$4,613.00	\$0.00	\$0.00	\$3,753.00

1. All contracts remitted will be assigned to the specified Register #. The remittance details can be view later by referencing the Register Number.
2. The report can be downloaded in various formats. Select the format you wish to download the report; **CSV (comma delimited)** is the recommended format.

REGISTER				BANK
Register #	R20210215-11269895			Bank
Register Date	2/15/2021			Account



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

## RPT905 – Dealer Billing Statement

This core report provides a full monthly summary of contract billing activity. This serves as the main report dealers refer to for a monthly summary of all billing activity.

(Located under the **REPORTS** navigation tab > Admin Reports > RPT905-Dealer Billing Statement)

RPT905 - Dealer Billing Statement

2021-Feb-01 - 2021-Feb-28 (2021-Feb)

Country: United States  
 State: ALL  
 Agent: Demo Agent  
 Dealer Group: ALL  
 Billing Party: TEST DEALER 2

TEST DEALER 2  
 400 SKOKIE BLVD  
 NORTHBROOK IL

Product Type	Report Group Code	New Contracts		Cancelled Contracts		Adjusted Contracts		Net Contracts	
		Quantity	Amount	Quantity	Amount	Quantity	Amount	Quantity	Amount
Complete Auto Value Protection	CAVP	1	\$243.00	0	\$0.00	0	\$0.00	1	\$243.00
Complete Auto Value Protection	Total	1	\$243.00	0	\$0.00	0	\$0.00	1	\$243.00
GAP	GAP	2	\$684.00	0	\$0.00	0	\$0.00	2	\$684.00
GAP	Total	2	\$684.00	0	\$0.00	0	\$0.00	2	\$684.00
VSC	VSC	3	\$4,901.00	0	\$0.00	0	\$0.00	3	\$4,901.00
VSC	Total	3	\$4,901.00	0	\$0.00	0	\$0.00	3	\$4,901.00
ContractTotal									\$5,828.00
Billing Statement Adjustments									\$0.00
Claims Credits									
Grand Total		6	\$5,828.00	0	\$0.00	0	\$0.00	6	\$5,828.00

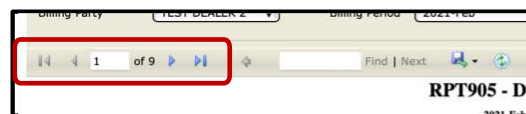
Confidential Data

Page 1 of 9

### Page 1:

- A Date Range:** The report will display the data for within the specified (month) date range.
- B Product Type/Report Group Code:** Contract billing activity by product type sum, total, and Report Group code.
- C New Contracts:** Count of contracts and gross sum of total \$ remitted by product type.
- D Cancelled Contracts:** Count of cancelled contracts and \$ amount of the credit.
- E Adjusted Contracts:** Count and sum of \$ (debit or credit) for contracts that have been adjusted within the specified reporting period.
- F Net Contracts:** Net count and \$ amount(s) by product type, billing statement adjustments, and claims credits for the reporting period.

To view additional pages of the report, use the forward or backwards arrows located in the Report Header section.



**Page 2: Current Period Billing Statement Adjustments:** Detailed line-item description and \$ amount of net billing statement total.

Current Period Billing Statement Adjustments	
Billing Statement Adjustment Description	Balance
Total	
Confidential Data	

**Page 3: Current Period Claim Credits:** Provides detail 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
Total									0	\$0.00
Confidential Data					Page 3 of 9					

**Page 4: 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
2/13/2021	2/13/2021	AP00051377	TEST TEST	JN1BJ1CV4LW551961	APEX 2.0 PRO HEV BATTERY VSC	NB	R20210213-11268469	\$1,490.00	\$0.00	\$1,490.00
2/15/2021	2/15/2021	APR0051511	JOHN TEST		APEX 2.0 PREMIER VSC	NB	R20210215-11269895	\$1,463.00	\$0.00	\$1,463.00
2/13/2021	2/13/2021	CAVF0001001	TEST TEST	JN1BJ1CV4LW551961	CAVP CARCO CAVP	NB	R20210213-11268466	\$243.00	\$243.00	\$0.00
2/13/2021	2/13/2021	G200001014	TEST TEST	JN1BJ1CV4LW551961	150 FR GAP N5 GAP	NB	R20210213-11268466	\$342.00	\$342.00	\$0.00
2/13/2021	2/15/2021	G200001015	TEST TEST	3FA6POH76FR279489	150 FR GAP N5 GAP	NB	R20210215-11269895	\$342.00	\$0.00	\$342.00
2/13/2021	2/15/2021	VMN0051400	TEST TEST	3FA6POH76FR279489	VMAX/L4 VSC	NB	R20210215-11269895	\$1,948.00	\$0.00	\$1,948.00
Total								\$5,828.00	\$585.00	\$5,243.00
Confidential Data					Page 4 of 9					

**Page 5: 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
Confidential Data					Page 5 of 9					

**Page 6: Current Period Adjustment, Cancellation, Reinstatement for Contracts Remitted Two (2) Previous Periods:** 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
Confidential Data					Page 6 of 9					

**Page 7: Current Period Adjustment, Cancellation, Reinstatement for Contracts Remitted Three (3) Previous Periods:** 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
Total								\$0.00		\$0.00
Confidential Data					Page 7 of 9					

**Page 8: 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
Total								
Confidential Data					Page 8 of 9			

**Page 9: 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	
Confidential Data					Page 9 of 9				



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

**NOTES:**