# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>VERSION INFORMATION</td>
<td>3</td>
</tr>
<tr>
<td>LEGEND</td>
<td>3</td>
</tr>
<tr>
<td>INTRODUCTION</td>
<td>4</td>
</tr>
<tr>
<td>LOGGING INTO PCRS</td>
<td>5</td>
</tr>
<tr>
<td>Supported Web Browsers</td>
<td>5</td>
</tr>
<tr>
<td>PCRS Portal Access</td>
<td>5</td>
</tr>
<tr>
<td>PCRS Home Page</td>
<td>6</td>
</tr>
<tr>
<td>CONTRACTS</td>
<td>10</td>
</tr>
<tr>
<td>Add Contract</td>
<td>10</td>
</tr>
<tr>
<td>Lender Search</td>
<td>11</td>
</tr>
<tr>
<td>Add Lender</td>
<td>12</td>
</tr>
<tr>
<td>Product Selection</td>
<td>12</td>
</tr>
<tr>
<td>Product Pricing</td>
<td>13</td>
</tr>
<tr>
<td>Customer Information</td>
<td>15</td>
</tr>
<tr>
<td>eSignature</td>
<td>16</td>
</tr>
<tr>
<td>QUICK RATER</td>
<td>19</td>
</tr>
<tr>
<td>QUOTES</td>
<td>10</td>
</tr>
<tr>
<td>SEARCH &amp; VIEW COMPLETED CONTRACTS</td>
<td>26</td>
</tr>
<tr>
<td>Search Contract</td>
<td>26</td>
</tr>
<tr>
<td>Custom Column View</td>
<td>28</td>
</tr>
<tr>
<td>Add or Remove Columns</td>
<td>28</td>
</tr>
<tr>
<td>Search Contracts / View Completed Contracts</td>
<td>29</td>
</tr>
<tr>
<td>Process Register</td>
<td>35</td>
</tr>
<tr>
<td>SEARCH DEALER</td>
<td>38</td>
</tr>
<tr>
<td>REPORTING</td>
<td>40</td>
</tr>
<tr>
<td>Reporting Parameter Screens</td>
<td>41</td>
</tr>
<tr>
<td>RPT603 – Sales Summary Report</td>
<td>43</td>
</tr>
<tr>
<td>RPT151 – Contract Sale Report</td>
<td>43</td>
</tr>
<tr>
<td>RPT200 – Sales Register Processed Report</td>
<td>45</td>
</tr>
<tr>
<td>RPT905 – Dealer Billing Statement Report</td>
<td>46</td>
</tr>
</tbody>
</table>
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.**
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.
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.

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**.
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.

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

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.

   The **Sale Date** of the contract cannot be backdated!
4. 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
Lender Name
```

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

**Lender Search**

5. ‘Click’ the lookup icon to begin the Lender Search.

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

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

8. 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

9. To add a new Lender not yet in the database, ‘Click’ + Add Lender to display the Add Lender screen.

10. 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

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

12. The Select Products page will display the entire list of products for which the Vehicle is qualified. Each section represents the various coverages, and each box represents the coverages that the Vehicle is qualified for.

If 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.

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.

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.

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

22. ‘Click’ the Printer icon to preview a sample of the contract prior to submission.

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

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

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.
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.

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.

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

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

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 *.

4. ‘Click’ the Financial Tab and enter the required* information on the Financial Information screen.

5. ‘Click’ Show Rates after the Vehicle and Financial information has been entered to display rates for
6. Quick Rater will display the eligible coverages for the vehicle, grouped by product.

7. 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.

8. ‘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.

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.

11. ‘Click’ Add to Selected to add the coverage and options to the cart.

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

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
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.

   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.
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.

   **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).*

   **Product Type:**
   Filter your view by selecting a coverage type from the drop-down menu.
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 text filter or (dropdown arrow).

a. 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.


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

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

3. Once the desired Contract link is selected, the Contract details will display.
4. The Contract Header displays information and options available for the selected Contract.

- **Return/Back**: This arrow will return you to the Contract screen.
- **Contract Number**: The number of the Contract being viewed.
- **Contract Status**: The status of the Contract being viewed.
- **Contract Information**: Displays Currency, F&I Manager (if applied), Coverage Type, and Dealer Number and Name.
- **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.
- **Print**: Provides the option to Print the current Contract.
- **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**

**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.

**General**: Provides the main details of the Contract being viewed. Select the 🔗 to open the section and edit.

**Vehicle Information**: Provides the Vehicle information decoded from the related VIN. Select the 🔗 to open the section and edit.

**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.

**Coverage Information**: Provides various details of the specific Contracted Coverage including high-level pricing.

**Financial Information**: Displays all Financial Information entered (and not entered) during the Contract creation process. Select the 🔗 to open the section and edit.
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 pencil icon 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.

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.

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.

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.*

![Add Claim Screen](image)

---

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

---

6. **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](image)
b. **Rates Details**: View the detailed Written, Cancelled, and Balance(s) of the Contract Transaction.

<table>
<thead>
<tr>
<th>Rates Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ADJUST</strong></td>
</tr>
<tr>
<td>BASEADJUST</td>
</tr>
<tr>
<td>MARKETFEE</td>
</tr>
<tr>
<td>MVESCI</td>
</tr>
<tr>
<td>AUDITFEE</td>
</tr>
<tr>
<td>Summary</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Rates Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>RESERVED AND FEES</strong></td>
</tr>
<tr>
<td><strong>Base Reserve</strong></td>
</tr>
<tr>
<td>BASERESERVE</td>
</tr>
<tr>
<td>SUPCHARGE</td>
</tr>
<tr>
<td>CLF</td>
</tr>
<tr>
<td>PREMIUM/FAI</td>
</tr>
<tr>
<td>Summary</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Rates Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>COMMISSION</strong></td>
</tr>
<tr>
<td><strong>Agent Commission</strong></td>
</tr>
<tr>
<td>AGENCYCOMM</td>
</tr>
<tr>
<td>DISCOUNT</td>
</tr>
<tr>
<td>SELL-MRCOMM</td>
</tr>
<tr>
<td>SUROCOMM</td>
</tr>
<tr>
<td>SUBAMT</td>
</tr>
<tr>
<td>Summary</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Rates Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TOTAL</strong></td>
</tr>
<tr>
<td><strong>Rate</strong></td>
</tr>
<tr>
<td>Net Rate</td>
</tr>
<tr>
<td>+</td>
</tr>
<tr>
<td>+</td>
</tr>
<tr>
<td>+</td>
</tr>
<tr>
<td>+</td>
</tr>
<tr>
<td>+</td>
</tr>
<tr>
<td>+</td>
</tr>
</tbody>
</table>

---

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.

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.
Review selected Contract count and totals to pay for accuracy.

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.

Review all Transactions for accuracy.

Review Action and Status of Payment section for correct payment type. Use the CHANGE button to choose the payment type (ACH or Check).

‘Click’ the PAY ALL button to remit displayed transactions.

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

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.
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.

Country: Defaults to the United States

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).*

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).*

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

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

Details:
- a. Yes - will display contract level detail supporting the summary level data.
- b. No - will display summary level data only.

State: Select a State from the dropdown list.

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).*
**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.

**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”.

**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.

**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.

---

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)*

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

**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)*
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.)

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.

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)

Page 1:

A Date Range: The report will display the data for within the specified (month) date range.


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.

<table>
<thead>
<tr>
<th>Current Period Billing Statement Adjustments</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Billing Statement Adjustment Description</strong></td>
<td><strong>Balance</strong></td>
</tr>
<tr>
<td>Total</td>
<td></td>
</tr>
<tr>
<td>Confidential Data</td>
<td></td>
</tr>
</tbody>
</table>

Page 3: **Current Period Claim Credits:** Provides detail information of $ credit amount per claim with line-item claim detail.

<table>
<thead>
<tr>
<th>Current Period Claim Credits</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Paid Date</strong></td>
<td><strong>BO Number</strong></td>
</tr>
<tr>
<td>Total</td>
<td></td>
</tr>
<tr>
<td>Confidential Data</td>
<td>Page 3 of 9</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Current Period New Business(NB) with Adjustment (Adj), Cancellation (C), Reinstatement (R) for New Business(NB)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sale Date</strong></td>
<td><strong>Billing Date</strong></td>
</tr>
<tr>
<td>2/15/2021</td>
<td>2/15/2021</td>
</tr>
<tr>
<td>2/15/2021</td>
<td>2/15/2021</td>
</tr>
<tr>
<td>2/15/2021</td>
<td>2/15/2021</td>
</tr>
<tr>
<td>2/15/2021</td>
<td>2/15/2021</td>
</tr>
<tr>
<td>2/15/2021</td>
<td>2/15/2021</td>
</tr>
<tr>
<td>2/15/2021</td>
<td>2/15/2021</td>
</tr>
<tr>
<td>Total</td>
<td></td>
</tr>
<tr>
<td>Confidential Data</td>
<td>Page 4 of 9</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Current Period Adjustment (Adj), Cancellation (C), Reinstatement (R) for Contracts Remitted in the Previous Period</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sale Date</strong></td>
<td><strong>Billing Date</strong></td>
</tr>
<tr>
<td>Total</td>
<td></td>
</tr>
<tr>
<td>Confidential Data</td>
<td>Page 5 of 9</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Current Period Adjustment (Adj), Cancellation (C), Reinstatement (R) for Contracts Remitted two (2) Previous Periods</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sale Date</strong></td>
<td><strong>Billing Date</strong></td>
</tr>
<tr>
<td>Total</td>
<td></td>
</tr>
<tr>
<td>Confidential Data</td>
<td>Page 6 of 9</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Date</th>
<th>Billing Date</th>
<th>Contract Number</th>
<th>Name</th>
<th>VIN</th>
<th>Coverage/Report Group</th>
<th>Type</th>
<th>Register #</th>
<th>Due</th>
<th>Applied</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

Confidential Data

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.

<table>
<thead>
<tr>
<th>PCS1 Entry Date</th>
<th>Sale Date</th>
<th>Number Of Days Pending</th>
<th>Contract Number</th>
<th>Name</th>
<th>VIN</th>
<th>Coverage/Report Group</th>
<th>Amount</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Confidential Data

Page 9: Pending Adjustments, Cancellations, Reinstatements: Displays all pending adjustments, cancellations, and reinstatements.

<table>
<thead>
<tr>
<th>PCS9 Entry Date</th>
<th>Trans Date</th>
<th>Number Of Days Pending</th>
<th>Trans Type</th>
<th>Contract Number</th>
<th>Name</th>
<th>VIN</th>
<th>Coverage/Report Group</th>
<th>Amount</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
<td></td>
</tr>
</tbody>
</table>

Confidential Data

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