



PCRS+ Agent User Guide

Dashboard, Commission Statements and Reporting

PCRS+ Portal Access:

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.

There are 2 ways to access our portal:

Option 1 Open your web browser and visit the Classictrak website: <https://www.classictrak.com> then click [Agent Connect/Dealer Login] this will direct you to the PCRS Login screen

Option 2 Open your web browser and type in clk.pcrsauto.com Enter your login email and password (initial temporary password is: welcome1 and 'Click' **Log In**.

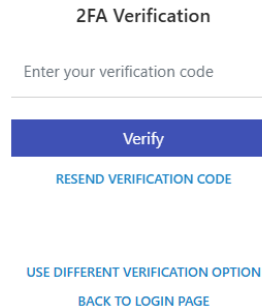
A prompt to change your password will appear.

Once the new password has been established, a two factor authentication prompt will appear. A 2FA code will be sent to the email address being used to log in.

USER INFORMATION:

Once you have logged in you may hover over your name to display your current User information.

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



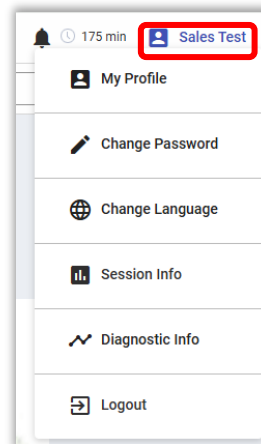
[EXTERNAL] MfaTokenSubject



cltkdonotreply@pcmicorp.com
To: Melissa Buchan

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

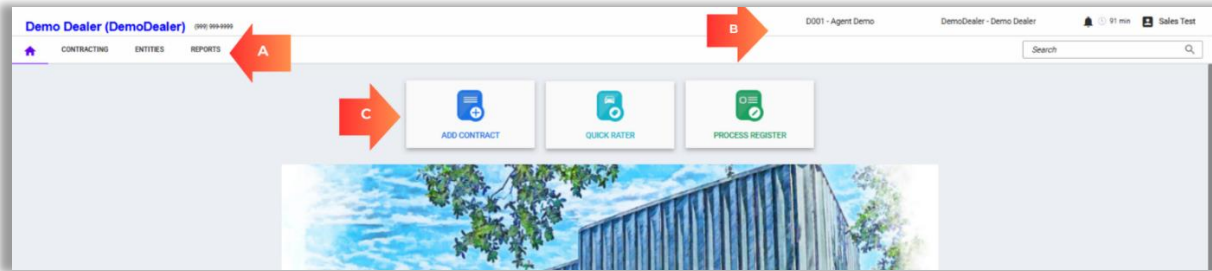
Your PCRS verification code is : 292229



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

PCRS HOMEPAGE:

The PCRS+ homepage provides quick and easy access to key features and tools.



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

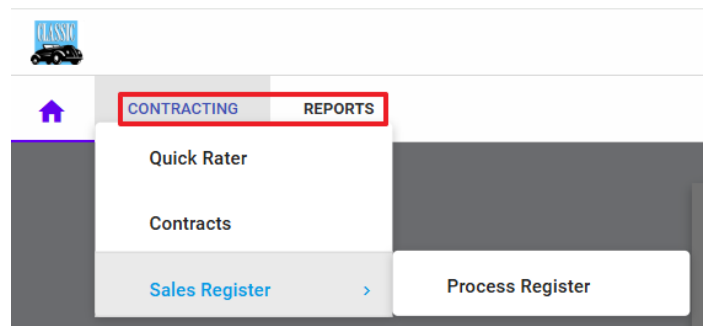
A - NAVIGATION MENU:

The top Navigation area features cascading menu options.

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

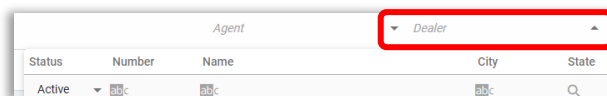
HOME: Takes you to the homepage.
CONTRACTING: Provides access to various Contract options and the Process Register.

REPORTS: Provides access to various reports by category and a sub menu for each item. (Report options vary by user)



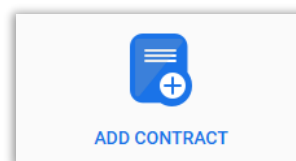
B – RIGHT HEADER NAVIGATION

SELECT A DEALER: This may be auto populated for you or you may have to 'click' the drop-down arrow and select your desired dealer.

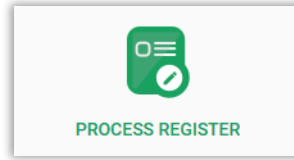


C – QUICK NAVIGATION BUTTONS

ADD CONTRACT: Select 'Add Contract' to begin the contract rating process. (If you have multiple rooftops in your system, be sure to select a Dealer)



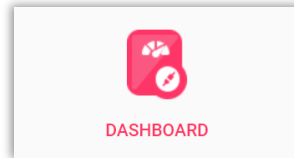
PROCESS REGISTER: Select 'Process Register' to remit Contracts and Other transactions.



QUICK RATER: Select 'Quick Rater' to begin the contract rating process. (If you have multiple rooftops in your system, be sure to select a Dealer)



SALES DASHBOARD: Select 'Dashboard' to launch the sales dashboard.



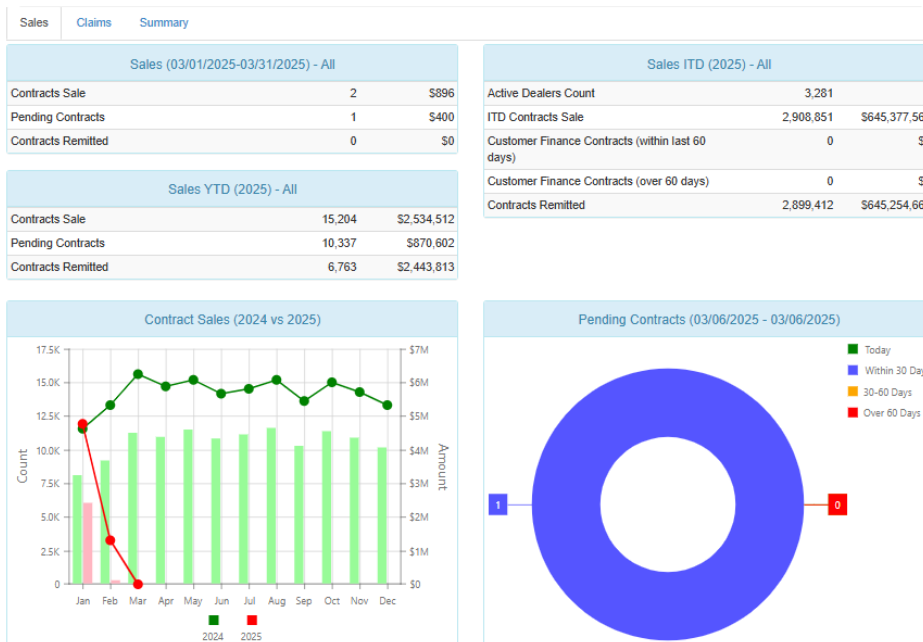
Dashboard

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.

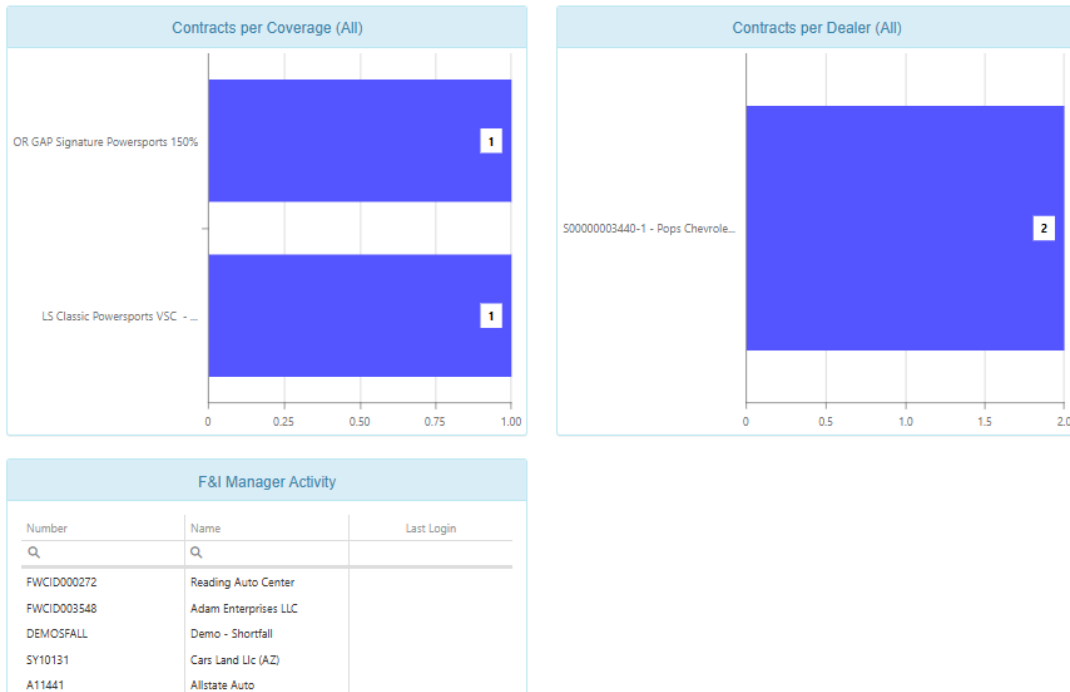
Filters

Dealer Group Type: ALL	Dealer Group: Select Dealer Group	Product: ALL	
Agent: Select Agent	Dealer: Select Dealer		
Period: < T 1m 3m 6m 1y Custom >	From: 3/1/2025 To: 3/31/2025	Refresh Clear	Open Report

The dashboard allows the user to view sales, claims and a summary. The dashboard will display sales data for the current month and year to day. The bar graph gives a year over year comparison of sales. There is also a circle chart for pending contracts and also provides a quick view of the pending contract aging.



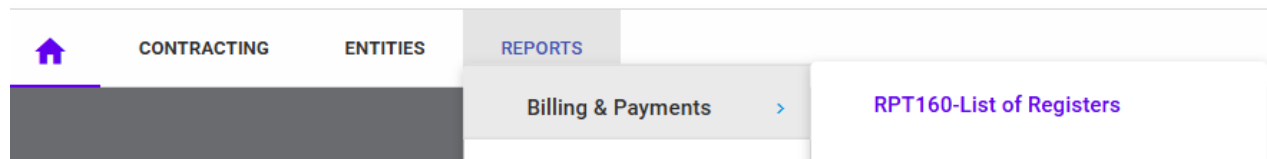
Additionally, a section that provides production by dealer based on coverage and number of contracts by dealer for that coverage. This view also shows sales by F&I Manager.



REPORTS

Report 160 will provide a list of process registers created for the selected criteria.

'Click' to expand the **REPORTS** quick link and scroll to the **Billing and & Statements** section.



If you have access to multiple dealer groups, select the appropriate group and select your servicing agency name from the list. Select "All" for provider and select to and from months/dates to review the lists of registers processed for the selected period.

RPT160 - List of Registers

Dealer Group: <input type="text" value="ALL"/>	Agent: <input type="text" value="ALL"/>	<input type="button" value="View Report"/>
Provider: <input type="text" value="ALL"/>	Month From: <input type="text" value="<Select a Value>"/>	<input type="button" value="Export CSV"/>
Month To: <input type="text"/>		

To view the details of a process register, click on the Register #. This will open a .pdf copy of the process register for viewing/printing.

RPT160 - List of Registers

2023-Oct-30 02:06 PM

Reporting Period: 9/1/2023 - 10/31/2023
 Dealer Group: ALL
 Agent: ALL
 Provider: ALL
 User: Louis Liapis

Dealer #	Dealer Name	Register #	Created By	Contract Count
AWTXT123	Auto World	R20230922-13379749	Mark Nagelvoort	2
D2345	Bitterroot Motors	R20230925-13382416	Mark Nagelvoort	1
D2345	Bitterroot Motors	R20230925-13382441	Mark Nagelvoort	1
D2345	Bitterroot Motors	R20230926-13383737	Mark Nagelvoort	1
D2345	Bitterroot Motors	R20230926-13383738	Mark Nagelvoort	3
D2345	Bitterroot Motors	R20230927-13385452	Mark Nagelvoort	1
D2345	Bitterroot Motors	R20230927-13385453	Mark Nagelvoort	0

Report 161 will provide a list of any process registers that have a positive or negative balance after a process register has had payment applied to it.

Click' to expand the **REPORTS** quick link and scroll to the **Out of Balance Registers** section.

Select the search criteria based on the desired view.

RPT161 - Out of Balance Registers

Country: State:
 Dealer Group: Dealer:

 1 of 1 Find | Next

The report will detail the total of the process register and the amount that was remitted and applied to that process register. If there was a shortage or overage, this report will give a quick view of those process register that are out of balance.

RPT161 - Out of Balance Registers

2023-Oct-30 04:49 PM

User: Louis Liapis
 Agent: ALL
 Dealer Group: ALL
 Dealer: ALL

Dealer Number	Dealer Name	Payee	Register Number	Check Date	Process Date	Check Amount	Remitted Amount	Check Memo
D2345	Bitterroot Motors	Force	R20180525-10462904			\$8,700.40	(\$8,665.40)	
			R20180605-10469781			\$1,258.60	(\$1,323.60)	
			R20180606-10470824			\$1,558.00	(\$1,259.00)	
			R20180711-10510059			\$1,891.10	(\$1,592.10)	
			R20180711-10510105			\$2,503.10	(\$2,226.10)	
			R20180803-10529856			\$1,930.10	(\$1,631.10)	
			R20180813-10534311			\$1,139.00	(\$840.00)	
			R20181105-10587124			\$15,984.10	(\$16,014.10)	
			R20190305-10656281	03/05/2019		\$1,609.00	(\$1,310.00)	
			R20190410-10682347	04/10/2019		\$1,616.20	(\$1,317.20)	
			R20190716-10761194	07/16/2019		\$1,945.10	(\$1,620.10)	
			R20190807-10780373	08/07/2019		\$2,973.00	(\$2,983.00)	VSC1009010 was short paid 10
			R20190904-10802327	09/04/2019		\$1,170.00	(\$1,175.00)	Dealer Underpaid on check # 225689
			R20191011-10833357	10/11/2019		\$980.00	(\$945.00)	
			R20191017-10837788	10/17/2019		\$496.00	(\$483.00)	
			R20200121-10908992	01/21/2020		\$1,305.00	(\$1,339.00)	
			R20200310-10952062	03/10/2020		\$458.85	(\$435.00)	Received CK 556896, Dealer has

Report 1003 will provide details for each cancellation payment sent for cancellations processed during the specified period of time.

Click' to expand the **REPORTS** quick link and scroll to the **Cancellation Statement** section.
 Select the search criteria based on the desired view.

RPT1003-Cancellation Statement

Country	United States	State	ALL	View Report
Product Type	ALL	Insurance Company	ALL	Export CSV
Dealer	ALL	Cancel Process Month	<Select a Value>	
Batch Number				

The report will detail a listing and details of each cancellation processed with administrator, dealer and customer refund amounts. This report will match the check that has been mailed for the report period.

RPT1003 - Cancellation Statement 2025-Mar-09 11:47 AM

DEMOSIGGAP - Demo Signature GAP Dealer

User Name	Contract Number	Customer Name	Customer Address	VIN	Product Type	Sale Date	Retail Rate	Net Rate	Cancellation Closed Date	Cancel Effective Date	Cancel Factor	Cancel Reason	Retail Refund	Refund From Dealer	Refund From Credit Risk	Check Number
1	GC00653315	XXXXXXXXXXXXXXXXXX	XXXX St. Miami, IL 22175	4GB85GBXA6044 44	GAP	11/6/2017	\$799.00	\$295.00	12/1/2019	12/2/2019	65.4950%	Trade In	\$473.31	\$330.11		\$143.20
2	GC00689688	XXXXXXXXXXXXXXXXXX	XXXX St. Oldsmar, IL 34677	1G1ZD5EU38F2497 59	GAP	3/14/2018	\$867.00	\$267.00	12/1/2019	3/14/2019	100.0000%	Unwound Deal	\$867.00	\$600.00		\$267.00
3	GC00689685	XXXXXXXXXXXXXXXXXX	XXXX St. Oldsmar, IL 34677	3FA6PH77ER3591 07	GAP	3/14/2018	\$905.00	\$305.00	12/1/2019	12/10/2019	70.9850%	Payoff	\$592.41	\$425.90		\$166.51
TOTAL													\$1,832.72	\$1,356.01		\$576.71

Report 600 will provide details for each commission payment during the specified period of time.
 Click' to expand the **REPORTS** quick link and scroll to the **Commission Statement** section.
 Select the search criteria based on the desired view.
 The first tab of this report provides a summary of the current commission cycle and a summary of year to date.
 The additional tabs will detail each seller's activity for the current commission cycle.
 This report can be exported to excel or pdf.

PCMI (TPA) RPT600 - Payee Statement

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Page Number:	PCMI	Report Month:	2023-Sep
Page Name:	PCMI (TPA)	Dealer Group Type:	ALL
Billing Address:	1030 W HIGGINS	Dealer Group:	ALL
Billing City:	PARK RIDGE IL 60068	Product Type:	ALL
Phone Number:	Ph: () -	Summary by Dealer:	No
Date Range:	09/01/2023 - 09/30/2023	Show Contract Detail:	Yes

Current Month Summary

Category	New Business	Cancellation	Adjustment	Grand Total
Appearance Protection	5	\$100.00	0	\$0.00
Complimentary Maintenance	2	\$50.00	0	\$0.00
Etc	1	\$25.00	0	\$0.00
Hyundai Gold	1	\$213.00	0	\$0.00
Key Replacement	2	\$38.00	0	\$0.00
Prepaid Maintenance	7	\$335.00	1 (\$65.00)	\$0.00
Road Hazard & Tire with Rental	2	\$40.00	0	\$0.00
Road Hazard & Tire without Rental	1	\$20.00	0	\$0.00
Service Guard Bronze FL	1	\$25.00	0	\$0.00
Vehicle Service Contracts	9	\$2,775.00	0	\$0.00
Total	31	\$3,621.00	1 (\$65.00)	\$0.00

Current Month	\$3,556.00
ITD Balance	\$16,722.34
Manual Adj.	\$0.00
Payments	\$0.00
New Balance	\$20,278.34

Sheet1	Sheet2	Sheet3	Sheet4	Sheet5	Sheet6	Sheet7	Sheet8	Sheet9	Sheet10	Sheet11
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Classic is here to provide you with the tools necessary to be successful. Call us at 1-800-930-4633 with any questions. We are available by telephone Monday through Friday from 9:00 a.m. to 5:00 p.m. EST.