PCRS+ User Guide

Contract Cancel, Remittance and Reporting

PCRS+ PORTAL ACCESS

This guide highlights 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.

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 cltk.pcrsauto.com

THEN

Enter your login email and password (initial temporary password is: welcome1 and 'Click' **Log In.**
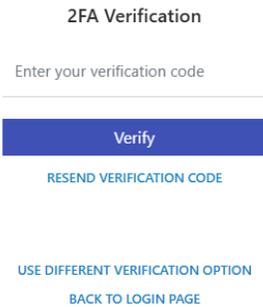
A prompt to change your password will appear.

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.

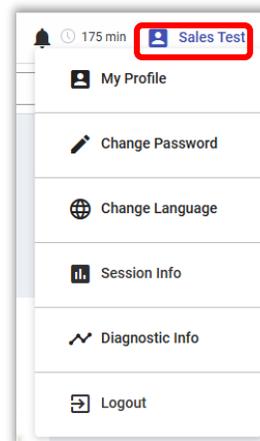All users have permission to **LOGOUT** from this screen.
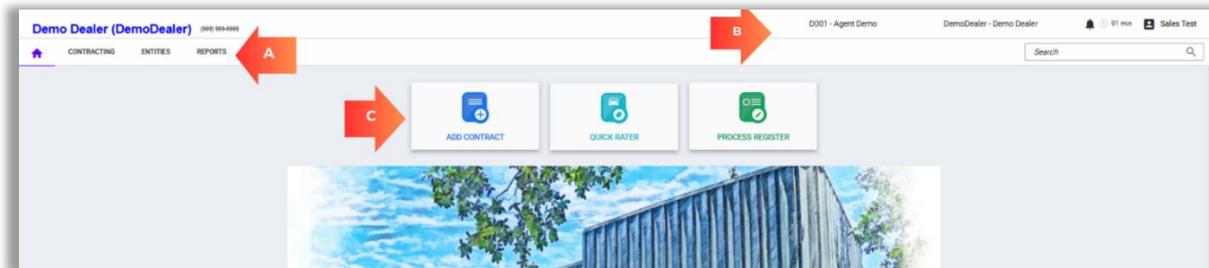
Contact your system administrator if you do not have the URL, user email, and/or a password to log in.

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)
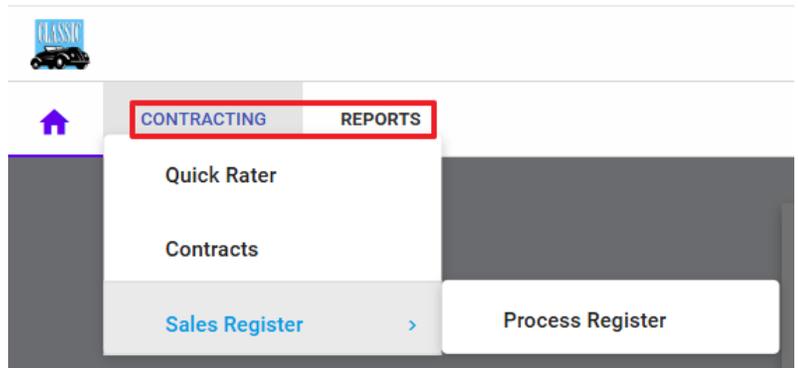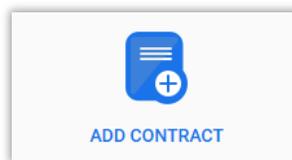

B – RIGHT HEADER NAVIGATION

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.
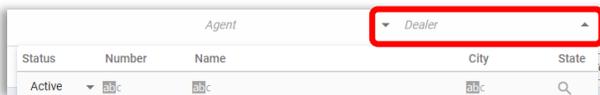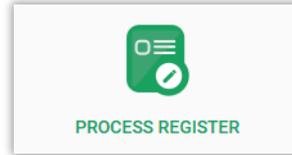


C – QUICK NAVIGATION BUTTONS

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.

PROCESS REGISTER

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)

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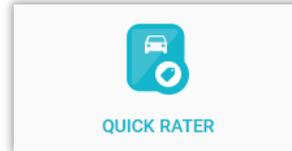
SALES DASHBOARD: Select 'Dashboard' to launch the sales dashboard.

DASHBOARD
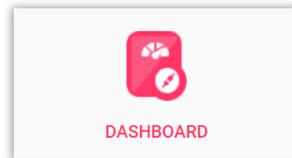
SEARCH CONTRACTS

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 you select.

1. 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, hold **CTRL** + 🔼

2. Once clicked, the Contract details will display.

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

A. **Return/Back:** Returns you to the Search Contract screen.
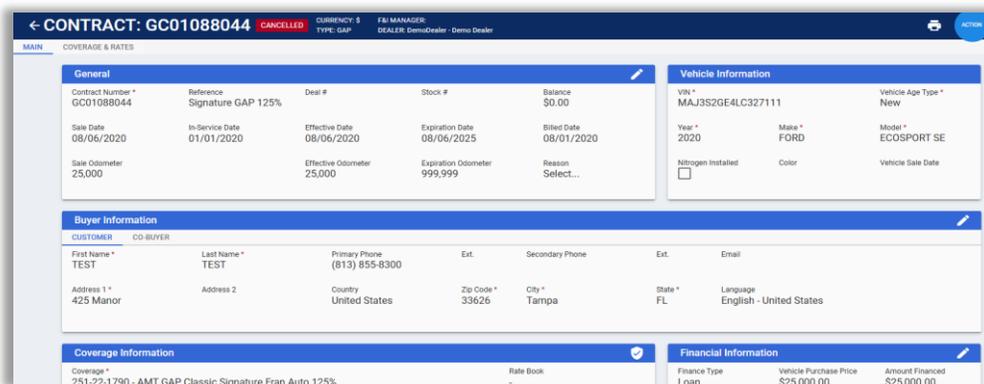B. **Contract Number:** The number of the Contract being viewed.
C. **Contract Status:** The current status of the contract being viewed.
D. **Contract Information:** Displays Currency, F&I Manager (if applied), Coverage Type, and Dealer Number and Name.

E. **Print:** Provides the option to Print the current Contract.
F. **Action:** Allows various options and status changes to be performed on an existing Contract. (See Voiding & Canceling section for details)
G. **Main/Coverage & Rates:** Select to view the Main Contract or Coverage & Rate details of the Contract (coverage & rates may not be available to all users).

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

Segments Included

**General:** Provides the main details of the Contract being viewed.

Vehicle Information: Provides the Vehicle information decoded from the related VIN.

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.

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 pencil to open and edit the section.*
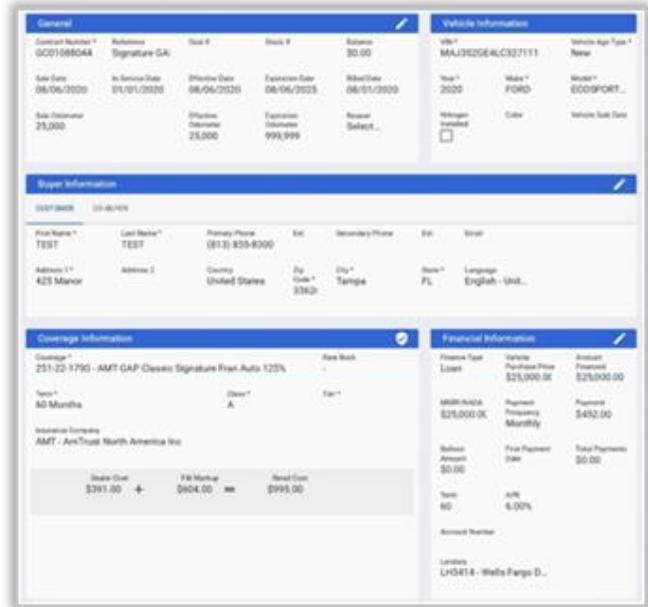
Based on granted security access, some of the options (like edit) described may not be available to all

5. **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:

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	Cost
☐	OR Late Fee ($50)	$0.00

VOIDING & CANCELING - ACTION BUTTON

The Action button provides the ability to Void and Edit pending contracts and Cancel active contracts.

1. Once you have accessed a contract you wish to void or cancel, locate the **Action** button in the top right corner of the contract.
2. 'Click' **Cancel**
3. A pop-up window will appear. Fill out the required information:
   - Cancel Effective Date
   - Cancel Odom
   - Cancel Reason (choose from the drop-down menu)
   - Cancel Method

*If the contract is in pending status, you will only have the option to edit or void the _____ contract.

4. Once the required information is inputted you will have several options available to proceed:
   - **Recalculate** – 'Click' this button if any changes need to be made to the cancellation information.
   - **Save Quote** – Save the quote if you do not wish to cancel at this time.
   - **Cancel Contract** – This button will cancel the active contract.
   - **Print** – "Print" saves the cancellation quote as a PDF. Click print to open the .pdf for printing.
   - **Upload File** – Upload supporting documents for cancellation.
   - **Close** – Close the pop-up window.

5. 'Click' **Cancel Contract**. Confirm cancellation on the pop-up window.

A cancellation worksheet is available after a successful cancellations has been completed. Click on the "Print" button to generate the worksheet.

To reprint the cancellation worksheet, search for the contract in the contract search screen. The contract details will now display a **Cancellation Details** section. Click the information button to reprint the cancellation worksheet .pdf.

PROCESS REGISTER

PCRS+ provides access to the Process Register. The payment method available is check or ACH and this is set up during the dealer set up process.

1. Select **Process Register** from the Homepage quick buttons or 'Click' **Contracting** -> **Sales Register** -> **Process Register**.
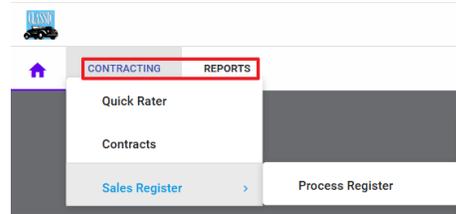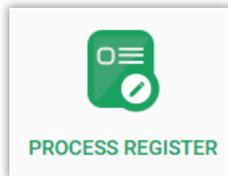
2. The **Process Register** screen will display. Select a Dealer from the main Process Register screen (*this may be auto populated for you or it may not be visible based on setup)* and apply your filters to display Contracts available for remittance.
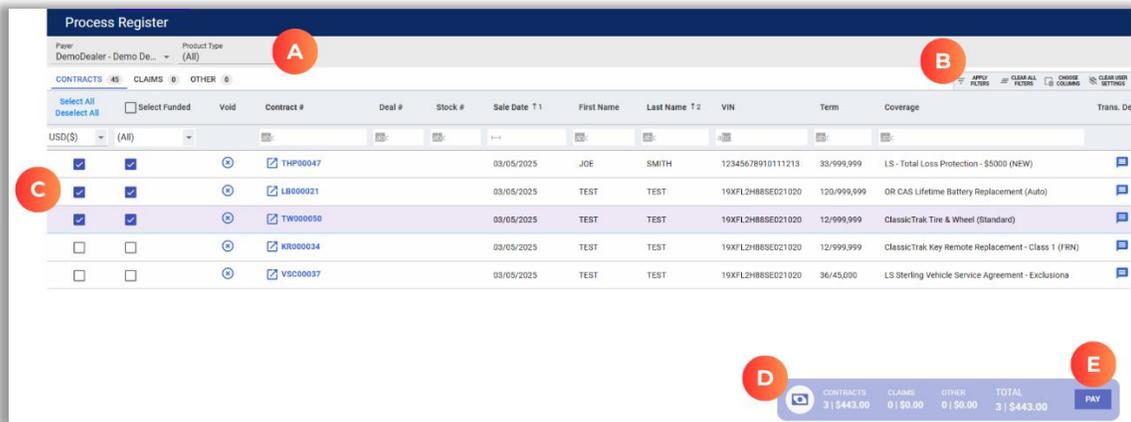
    A. Select a **Dealer** form the Payer list
    B. Select filters for your search, then 'Click' **APPLY FILTERS**.
    C. Select the **Contracts** you wish to remit using the checkboxes.
    D. Review selected Contract count and totals to pay for accuracy.
    E. Select **Pay** to proceed to the **Payment** 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).
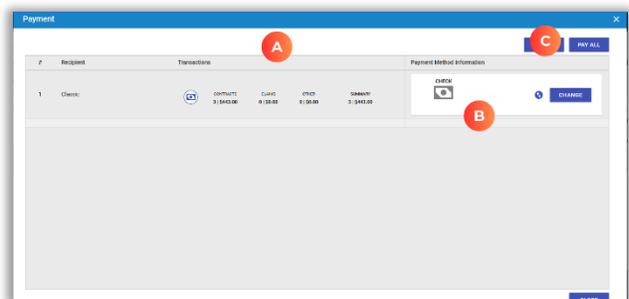
C. Change the banking information on the ACH payment option for up to five different bank accounts. Select the desired account.

D. 'Click' the **PAY ALL** button to remit displayed transactions. PCRS+ will generate the extract report (RPT200) of remitted contracts.

RPT200 - Sale Register Processed Report

	Contract #	Stock #	Sale Date	Customer/ Product Name	Coverage Term Months/ Miles	VIN Number	Vehicle	F&I Manager	Retail	Amount Due	Submitted	NET Cost	Dealer Cost
1	AP000041		3/13/2025	TEST TEST OR Classic Finish - Large Box Kit	84/999999	1N4BL4CV2RN419519	2024 NISSAN Altima 2.5 SR		$999.00	$0.00	$99.00	$99.00	$99.00
2	AP000042		3/13/2025	TEST TEST OR Classic Finish - Large Box Kit	84/999999	1N4BL4CV2RN419519	2024 NISSAN Altima 2.5 SR		$999.00	$0.00	$99.00	$99.00	$99.00
	Contracts Count:		2							$0.00	$198.00	$198.00	$198.00

REPORTS

1. **Report 160** will provide a list of process registers created for the selected criteria.
2. 'Click' to expand the **REPORTS** quick link and scroll to the **Billing and & Statements** section.
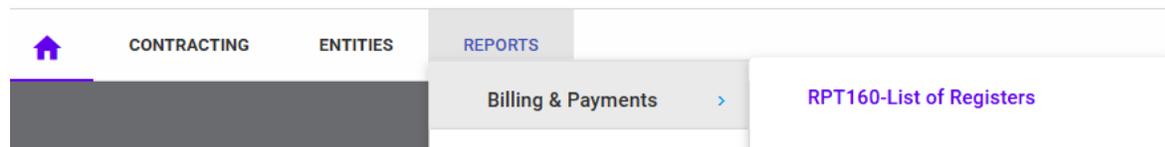
3. If you have access to multiple dealer groups, select the appropriate group and select your servicing agency name from the list. Select "All" for provider and select to and from months/dates to review the lists of registers processed for the selected period.

4. 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

5. **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.
6. Click' to expand the **REPORTS** quick link and scroll to the **Out of Balance Registers** section.
7. Select the search criteria based on the desired view.

RPT161 - Out of Balance Registers

Country	United States	State	ALL	View Report
Dealer Group	ALL	Dealer	ALL	Export CSV

|◁ ◁ 1 of 1 ▷ ▷| ◇ [   ] Find | Next 📄▾ ⟳

8. 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

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

10. Click' to expand the **REPORTS** quick link and scroll to the **Cancellation Statement** section.
11. 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	▾			

12. 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 Created Date	Cancel Effective Date	Cancel Factor	Cancel Reason	Retail Refund	Refund From Dealer	Refund From ClassicTrak	Check Number
1		G00653315	XXXXXXXX XXXXXXXX	XXXX St. Miami, IL 33175	4JGBB5GBXAA6044 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	XXXXXXXX XXXXXXXX	XXXX St. Oldsmar, IL 34677	1G1ZD5EU3BF2497 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	XXXXXXXX XXXXXXXX	XXXX St. Oldsmar, IL 34677	3FA6P0H77ER3591 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	$1,932.72	$1,356.01	$576.71	

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.