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.

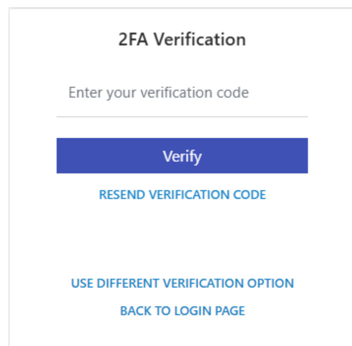
There are 2 ways to access our portal:

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.

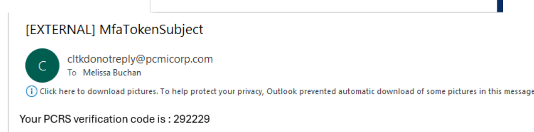
Option 2 Open your web browser and type in cltk.pcrsauto.com

THEN

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

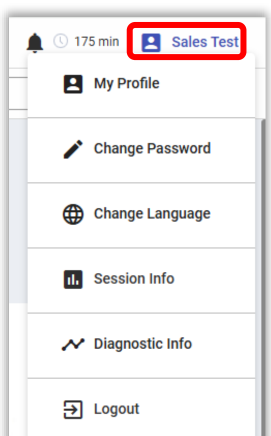


Once the new password has been established, a two factor authentication prompt will appear. A 2FA code will be sent to the email address being used to log in.



User Information:

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

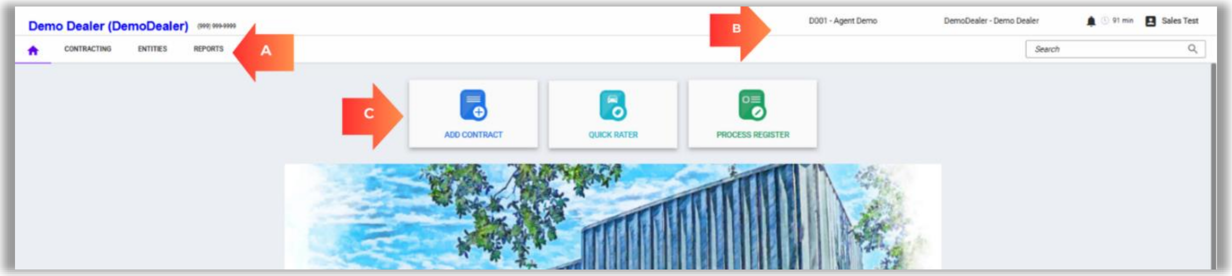


All users have permission to **LOGOUT** from this screen.

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 Men

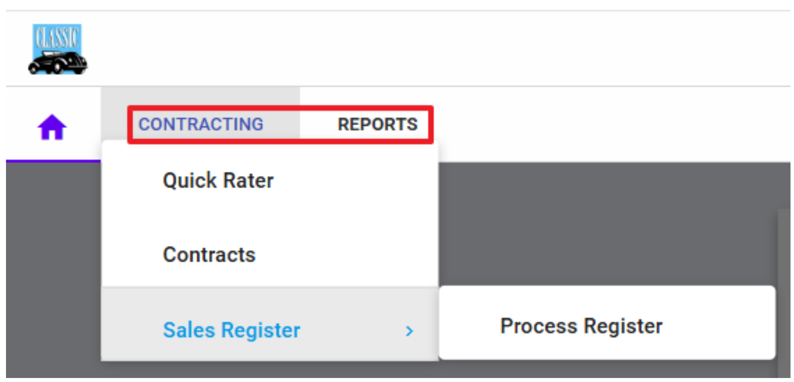
The top Navigation area features cascading menu options.

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)

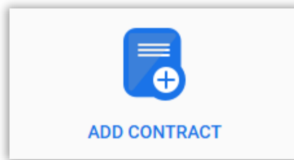


B – Right Header Navigation

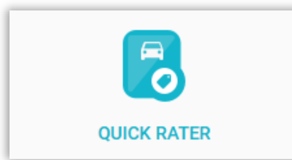
Select a Dealer: This may be auto populated for you or you may have to 'click' the drop-down arrow and select your desired dealer.

C – Quick Navigation Buttons

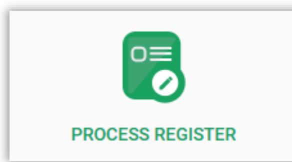
ADD CONTRACT: Select 'Add Contract' to begin the contract rating process. (If you have multiple rooftops in your system, be sure to select a Dealer)



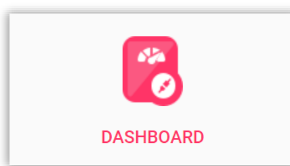
Quick Rater: Select 'Quick Rater' to begin the contract rating process. (If you have multiple rooftops in your system, be sure to select a Dealer)



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



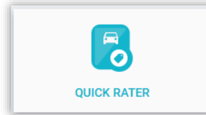
Sales Dashboard: Select 'Dashboard' to launch the sales dashboard.



Using The Quick Rater

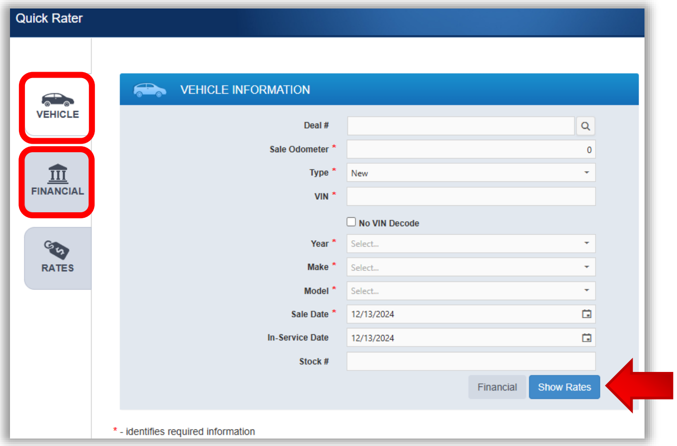
The Quick Rater tool will allow you to rate products for a specific vehicle prior to entering customer and lender information.

1. Verify you have the desired Dealer selected and displaying on the top of the 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 displayed fields. .

Note: for Powersports, RV or Marine, select the "No Vin Decode" box and complete the year/make/model dropdowns.



4. 'Click' the **Financial Tab** and enter the *required** Financial Information.

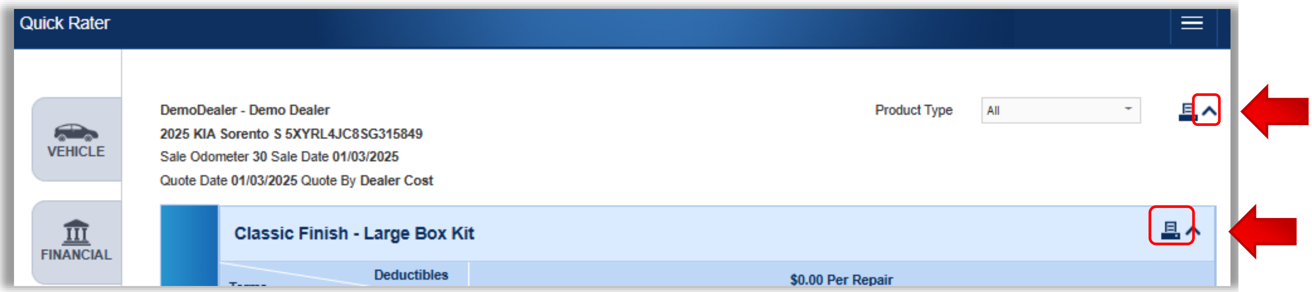
5. 'Click' **Show Rates** after the Vehicle and Financial information has been entered.

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

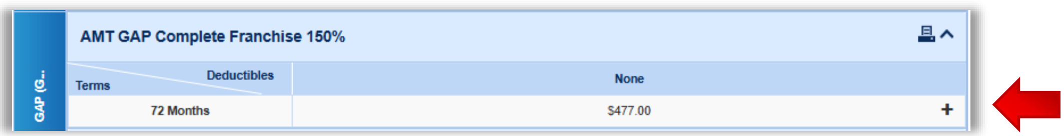
7. If the cart is obstructing the coverage drop-down arrows; you may 'collapse' the cart using the arrows in the upper right corner.
To restore the cart, 'Click' the cart icon in the lower right corner.

8. 'Click' the drop-down arrow ⮝ to the right of the coverage to view individual coverage reates or 'Click' the uppermost arrow to expand all coverage rates.

The print 🖶 icon next to each drop-down arrov 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 add symbol to preview a pop-up of the coverage rate.



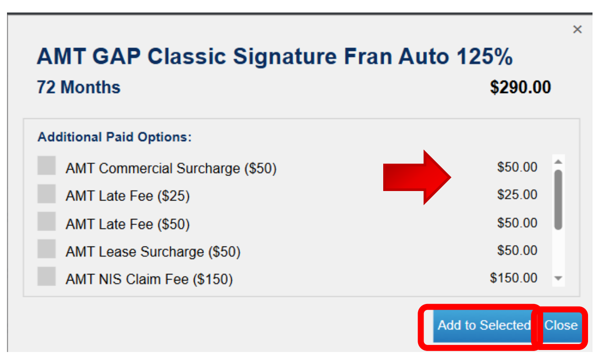
10. The pop-up will display the coverage type, term, deductible and coverage cost. Additional add-on options are selectable by selecting the checkbox next to the option. The specified add-on cost will be added to the coverage cost.

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.

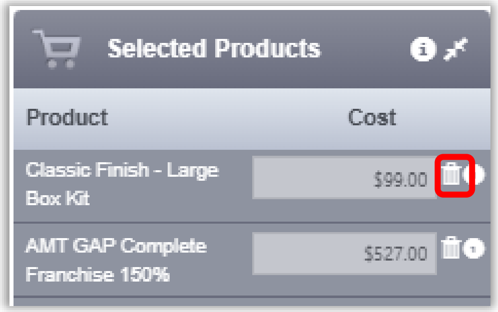


14. Your cart will display the selected coverage(s) and the price per product as a line item.

    The total for all coverage(s) will be displayed at the bottom.

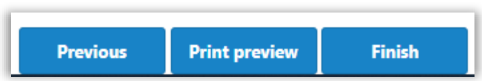
    If you need to remove a coverage 'click' the trash can to remove from your cart.

    'Click' continue.

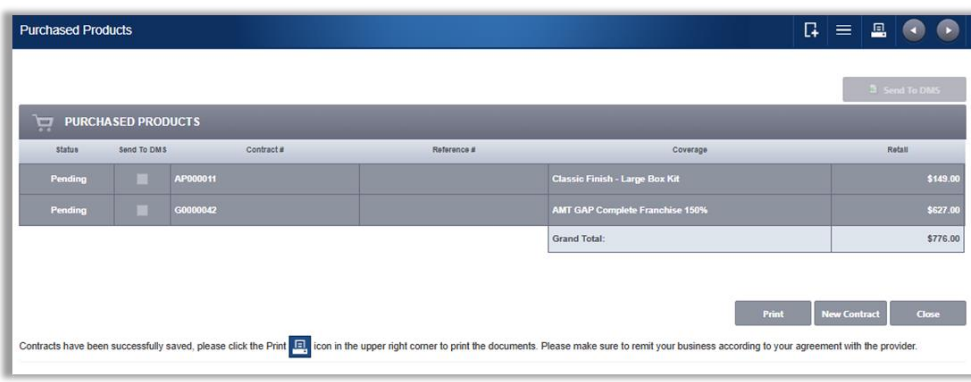


15. Complete the contract entry process by adding the *required** Customer information for all fields on the **Customer Information** screen. Vehicle and Financial information are carried forward from the previous screen.

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



17. 'Click' **Finish** to submit the contract.
18. Once the contract has been submitted. You will be directed to the finalized **Purchased Products** page.



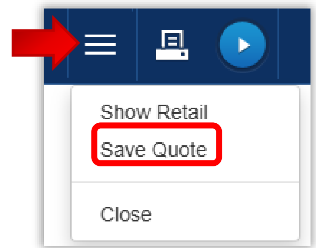
    You will see information regarding Contract Status, Contract #, Reference #, Coverage, Retail Price, and the Grand Total.
    'Click' the Print 🖶 icon to print the final contracts.
19. 'Click' New Contract to begin adding a new contract.

Create & Save a Quote

Creating a Quote will allow you to rate products for a specific vehicle prior to entering customer and lender information and saving it as a Quote will allow you to come back to edit the quote and finalize the contracting process.

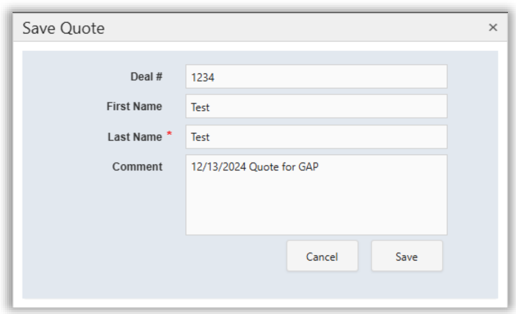
1. Begin the contract creation process via **Add Contract** or **Quick Rater.**

   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.

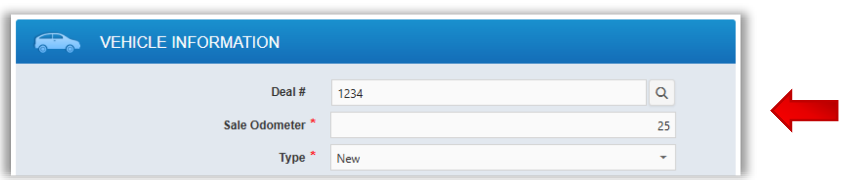
3. The Save Quote screen will display. Fill in the following information:
   a. **Deal #** (This is needed for to search for the quote at a later time)
   b. **Last Name** (*required**)



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

4. To view a previously saved quote. Begin the contract creation process via **Add Contract** or **Quick Rater.**

   Enter the **Deal #** you assigned the quote in the designated field.



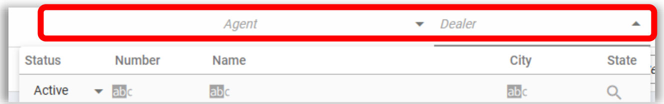
   If a **Deal #** was not assigned use the 'Search' button look up the quote by Name or VIN #.

   The quote will be recovered and all information will auto populate.

Add Contract

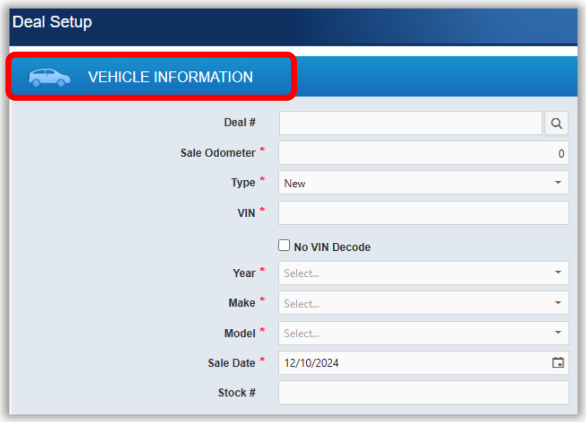
The Add Contract function of the PCRS+ Portal allows you to electronically rate and submit contracts, view all eligible products, and display prices for the vehicle.

1. Verify that you have the desired Agent/Dealer selected and displayed on the homepage.



2. Select the **Contract** 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 <u>required</u>.



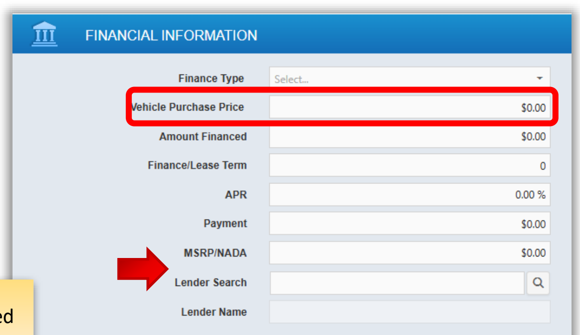
Note: for Powersports, RV or Marine, select the "No Vin Decode" box and complete the year/make/model dropdowns.

Sale Date is the date of the contract entry and not the sale date of the vehicle. You have the opportunity to add a vehicle purchase date later.

THE **SALE DATE** OF THE CONTRACT CANNOT BE FORWARD DATED!

4. On the right side of the screen, enter the **Vehicle Purchase Price.** (REQUIRED)

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

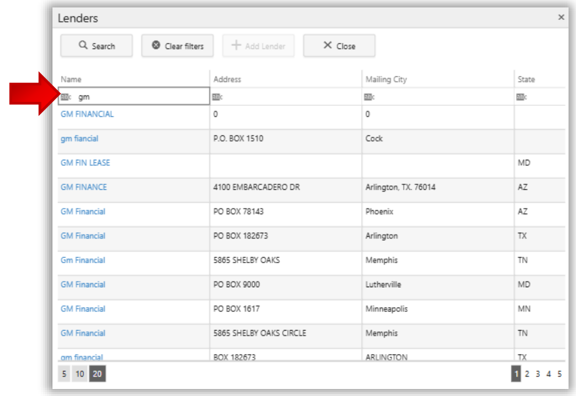


Full financial information is required to return rates for GAP products.

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.



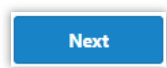
7. Type the name of the Lender in the **Name Search Field**. The field will search and narrow the Lenders as you type.

8. If the correct Lender appears in the list, ‘Click’ the lender name to select and proceed to next step.

Product Search

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

OR



10. The **Select Products** page will display the entire list of products for which the Vehicle is qualified. Each section represents the various coverages that the Vehicle is qualified for.

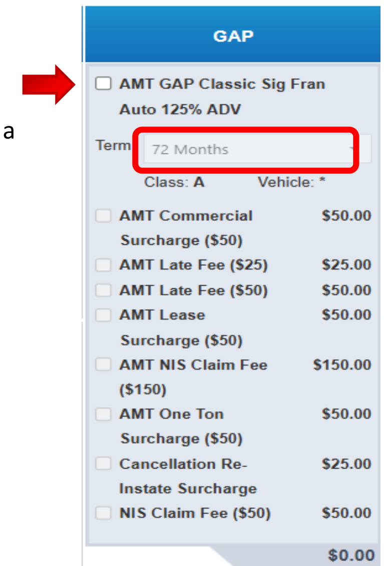
**Example pictured shows a Vehicle that qualifies for Appearance Protection, GAP & Paintless Dent Repair. If the vehicle qualifies for other products such as VSC, Key Replacement, Tire & Wheel etc. that section will be visible.*

> If there are no product results displayed, this may indicate the Vehicle is ineligible.

11. 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 list.

    'Click' to select the desired Term.

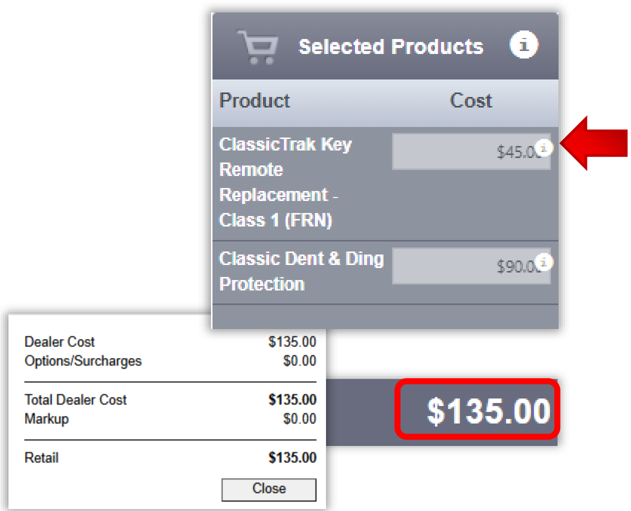


Product Pricing

12. The coverage price(s) selected are displayed on the right side of the **Select Products** screen.

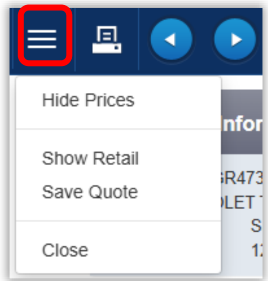
    The total of all coverages selected displays at the bottom of the **Selected Products** screen.

    If enabled you may 'Click' the ⓘ to view Product Price Summary.



13. You can view the **Retail Price** or **Dealer Cost** by selecting from the three horizontal lines.
(Options may vary depending on user permissions)

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

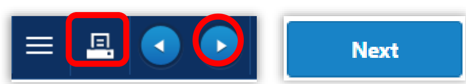


14. When the **Show Retail** view is selected, the pricing box below the Cost Header will open for editing the retail price of the coverage being charged to the Customer. *(State regulations will limit the allowable markup on a product)*

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.

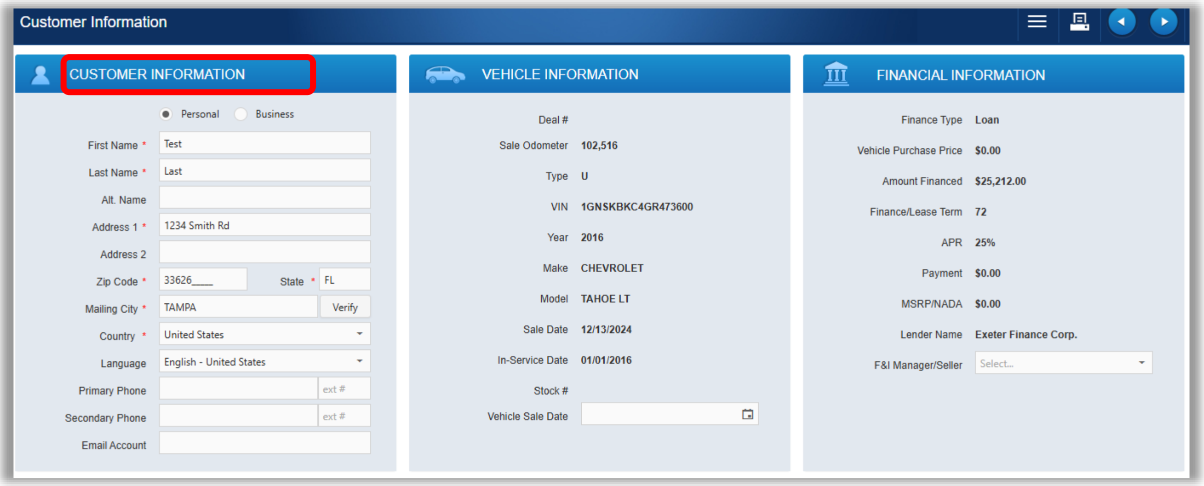
15. To print a quote of the selected coverage(s), 'Click' the Print Icon in the upper right corner.

To proceed to the **Customer Information** screen, Click the white arrow in the upper right corner of the page or the **Next** button to move forward.



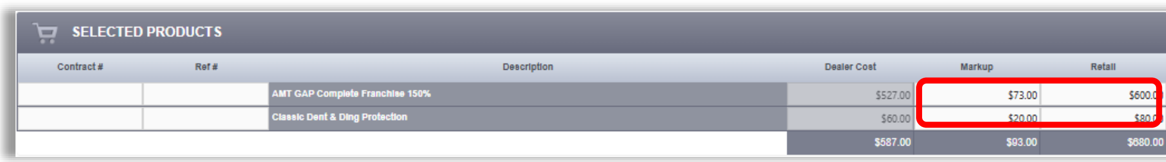
Customer Information

16. Enter the *required** Customer Information for all fields on the **Customer Information** screen. Vehicle and Financial information are carried forward from the previous screen.



ALL REQUIRED FIELDS MUST BE FILLED OUT BEFORE PROCEEDING

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



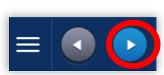
SELECTED PRODUCTS

Contract #	Ref #	Description	Dealer Cost	Markup	Retail
		AMT GAP Complete Franchise 150%	$527.00	$73.00	$600.0
		Classic Dent & Ding Protection	$60.00	$20.00	$80.0
			$587.00	$93.00	$680.00

18. '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.

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



OR