C·A·R·S
PROTECTION PLUS

DEALER PORTAL
QUICK REFERENCE GUIDE

INTRODUCTION

Welcome to CARS Protection Plus Dealer Portal!
The Dealer Portal is a look inside our Policy Administration system and gives more visibility into business done with CARS Vehicle Service Contracts and GAP Coverage. The Dealer Portal is meant to help you manage your business in an easy and more effective way.

You can find the CARS Protection Plus Dealer Portal at https://cars.pcrsauto.com. We hope you enjoy this tool!

See the following pages for Information on using the Dealer Portal.

ADD CONTRACT

The “Add Contract” function of the CARS Dealer Portal allows you to electronically rate and submit a contract. All eligible products for the vehicle will display with prices for each term.

STEPS TO USE:

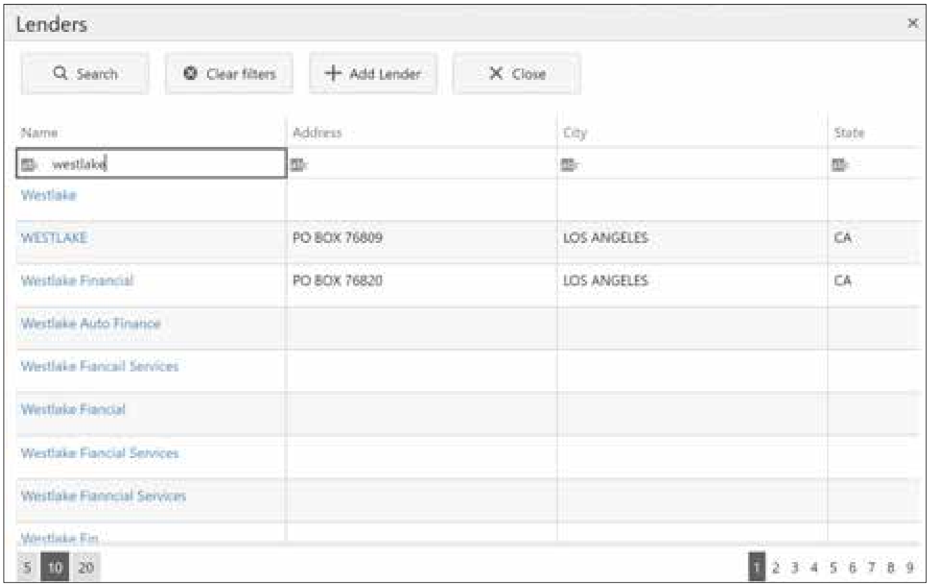
1. **Open Add Contract**
   The “Add Contract” tool can be found in the menu bar on the left of the screen under “Contract”. Clicking on the “Add Contract” link will open a new tab in your browser. If no new tab opens, watch for a flash in the top right corner of your screen when you click “Add Contract”. An icon should appear which you will click and select “Always allow pop-ups from this site.” Let us know if this doesn’t resolve the issue.

2. **Enter the Vehicle Information**
   The left side of the screen requires vehicle information to be entered; required fields have a red asterisk next to them. The “Year”, “Make”, and “Model” are all required, but can be decoded when the VIN is entered, and the fields will automatically populate the information. “Sale Date” is the date you enter the contract. This is not the “Vehicle Sale Date”. You will have the opportunity to add a vehicle purchase date later. Please note, the “Sale Date” cannot be backdated.

ADD CONTRACT (CONTINUED)

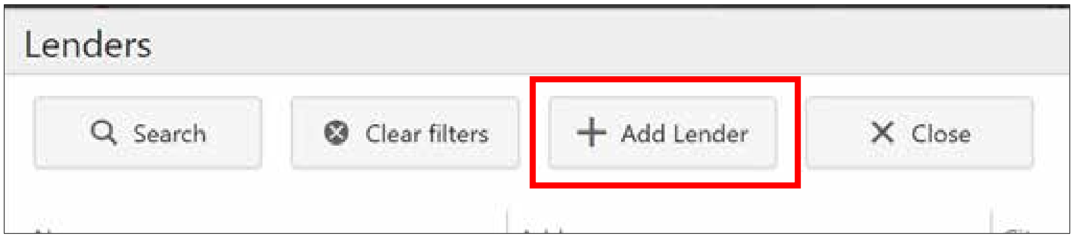
3. Enter Financial Information
The right side of the screen requires “Vehicle Purchase Price” to be entered and has a red asterisk. We also request you complete the “Lender Search” if the vehicle is financed.

4. Lender Search
Click the magnifying glass and you can type in the name of your lender to see if it already exists in our system.



ADD CONTRACT (CONTINUED)

5. Add Lender
If your lender is not yet in our database, click the “Add Lender” icon and then enter the required information.

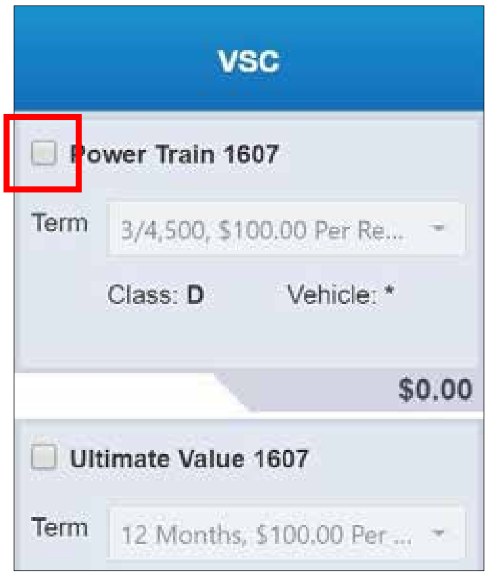


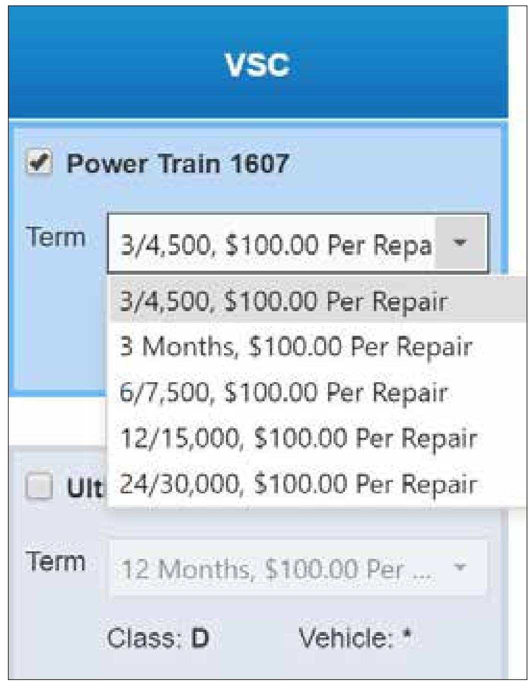
6. Continue to Product Selection
After you have entered all the vehicle and financial information, use the blue arrow in the top right corner to advance to the next page.

ADD CONTRACT (CONTINUED)

7. Select Products

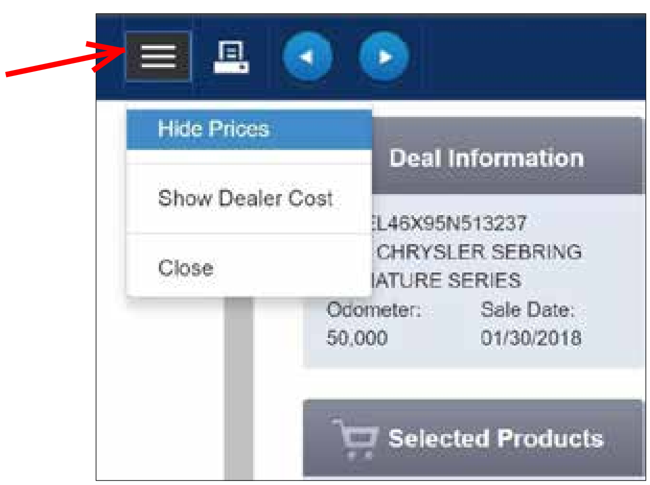
The next page will return the entire list of products for which the vehicle is qualified. Each box represents a different coverage. Once you select a program's checkbox, you will be able to pick the term you want from the drop-down. If there are no product results, this may mean the vehicle is ineligible. You can reference the ineligibility list on your Dealer Rate Card or contact our Dealer Services department with any questions.





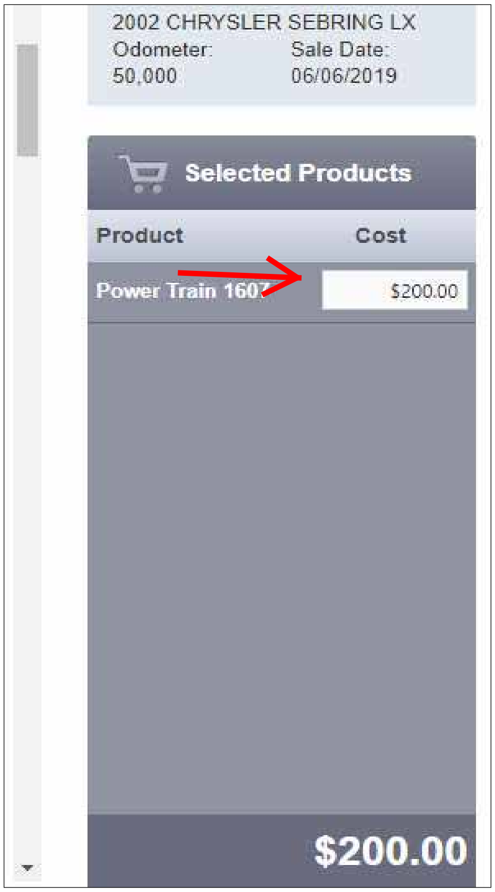
8. View Product Pricing

The price of the program will be displayed on the right. You can switch between the Dealer Cost and the Retail price by clicking the indicated icon and choosing "Show Dealer Cost" or "Show Retail".

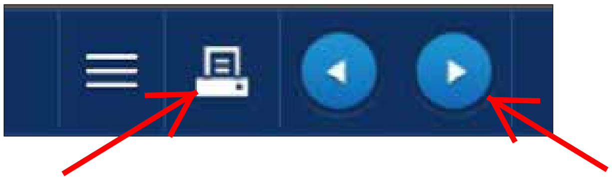


ADD CONTRACT (CONTINUED)

9. If you choose “Show Retail”, the box underneath the Cost header of the Selected Products section will be white, and you will be able to edit the amount your customer is being charged for the contract.



10. Continuing to Customer Information
You can use the Printer icon to print a quote or the right arrow to proceed.



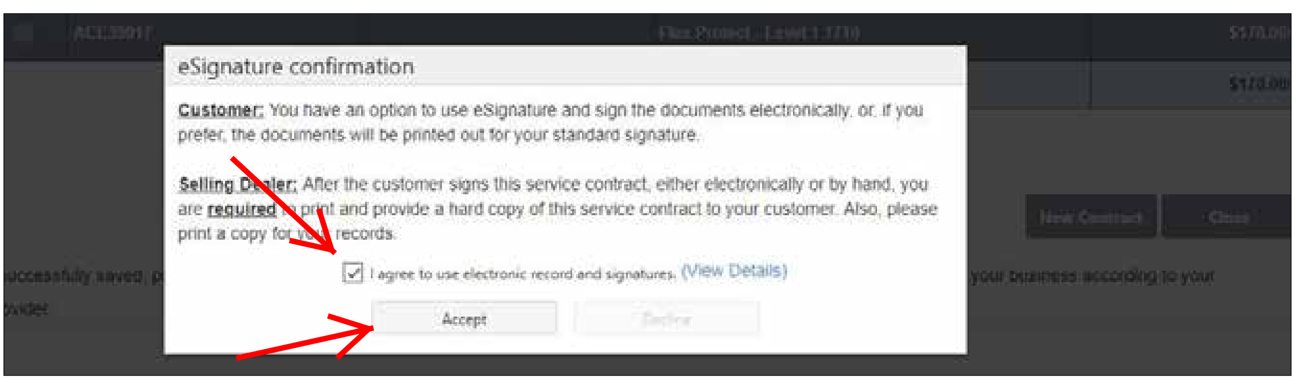
ADD CONTRACT (CONTINUED)

11. Customer Information

Enter all the required customer information. At this point you will have one last opportunity to edit the "Retail" price if you did not choose to earlier.

12. You can use the Printer icon to preview a sample version of the contract or the right arrow to SUBMIT the contract. Once submitted, you cannot change the contract. If you've made a mistake and need a correction, call our Sales department at 888-335-6838 or email sales@carspp.com.

13. Once you submit the contract, a message box will pop-up informing your customer of their option to sign the contract using the eSignature function. If they choose to use this function, check the agreement box and then click the "Accept" button.

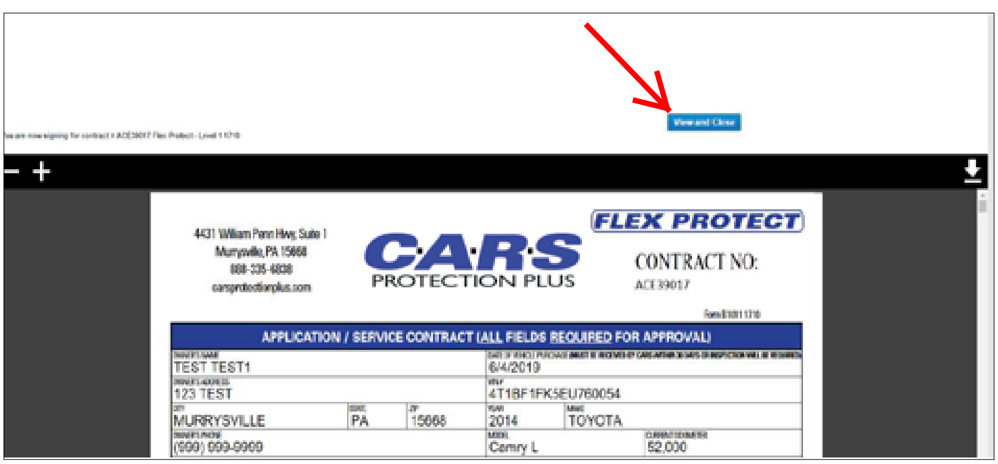


ADD CONTRACT (CONTINUED)

14. After clicking the “Accept” button, you will be redirected to a screen with a signature field displayed at the top and the contract shown below. The customer can now use the mouse to sign within the box.

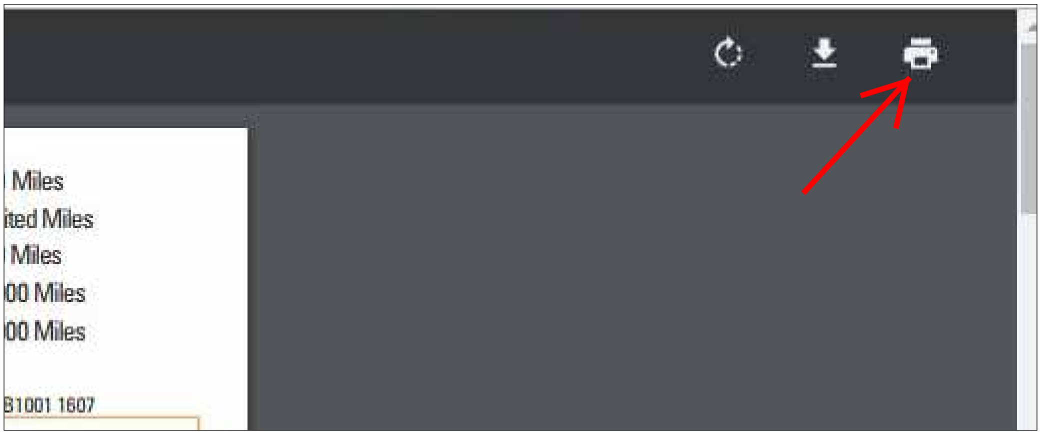
15. Once the customer has signed, the “Done” button will turn blue and can be clicked.

16. After you have clicked the “Done” button, a second button saying ‘’View and Close” will appear. After clicking this button, an additional tab will be opened, showing a completed contract, with a signature, for you to print out for yourself and the customer.



ADD CONTRACT (CONTINUED)

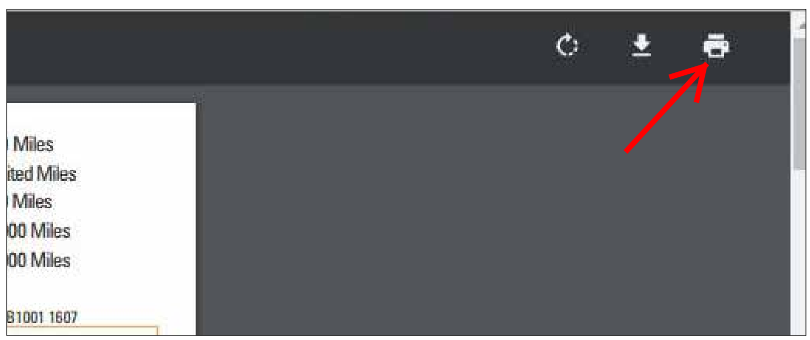
17. To print out the PDF, click the Printer icon in the top right corner of the screen when it appears.



18. If your customer chose to decline the eSignature, you will be taken directly to a new tab with a PDF of the unsigned contract for you to print out copies for the:

- Customer
- Dealer
- Remittance for CARS

  Use the Printer icon in the top right corner of the screen to print out the PDF. Once printed, have your customer sign these copies.



19. Once you have printed out the copies you need, exit out of the PDF tab. If you have another contract to enter, use the New Contract icon. Otherwise, click Close to end the process.

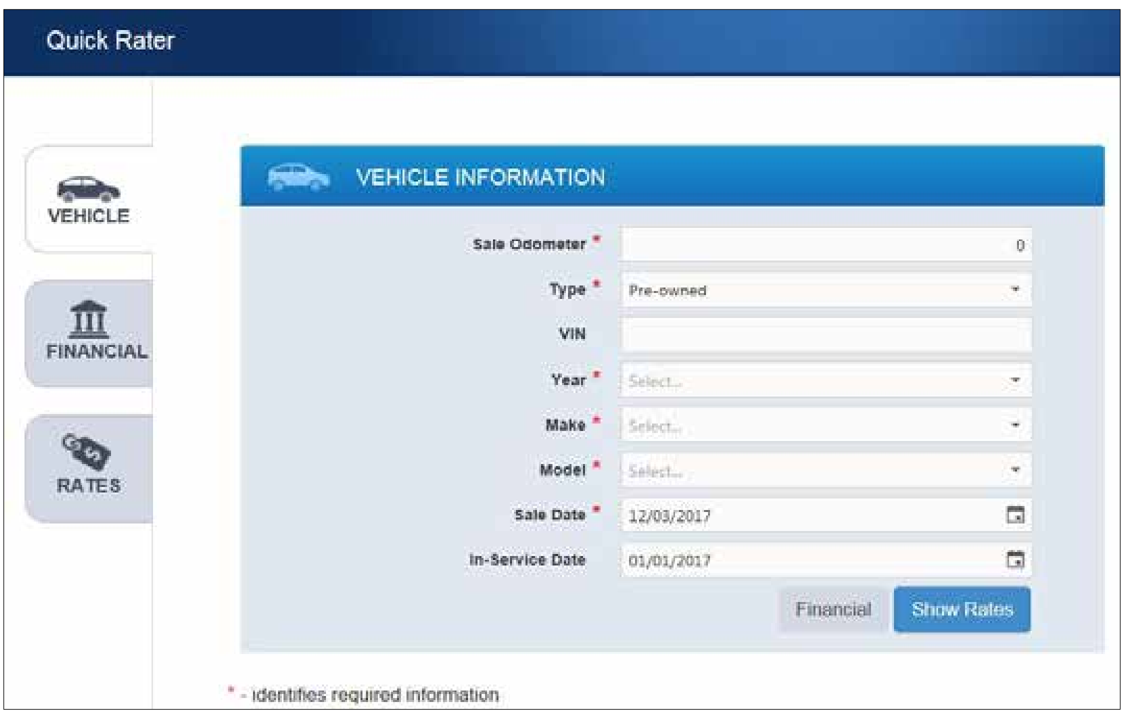
QUICK RATER

The Quick Rater function of the CARS Dealer Portal allows you to electronically rate a contract using only the vehicle VIN number, Odometer, and Sale Price. All eligible products for the vehicle will display with prices for each term.

STEPS TO USE

1. **Open the Quick Rater**
   The Quick Rater tool can be found in the menu bar on the left of the screen under "Contract". Clicking on the "Quick Rater" link will open up a new tab in your browser.

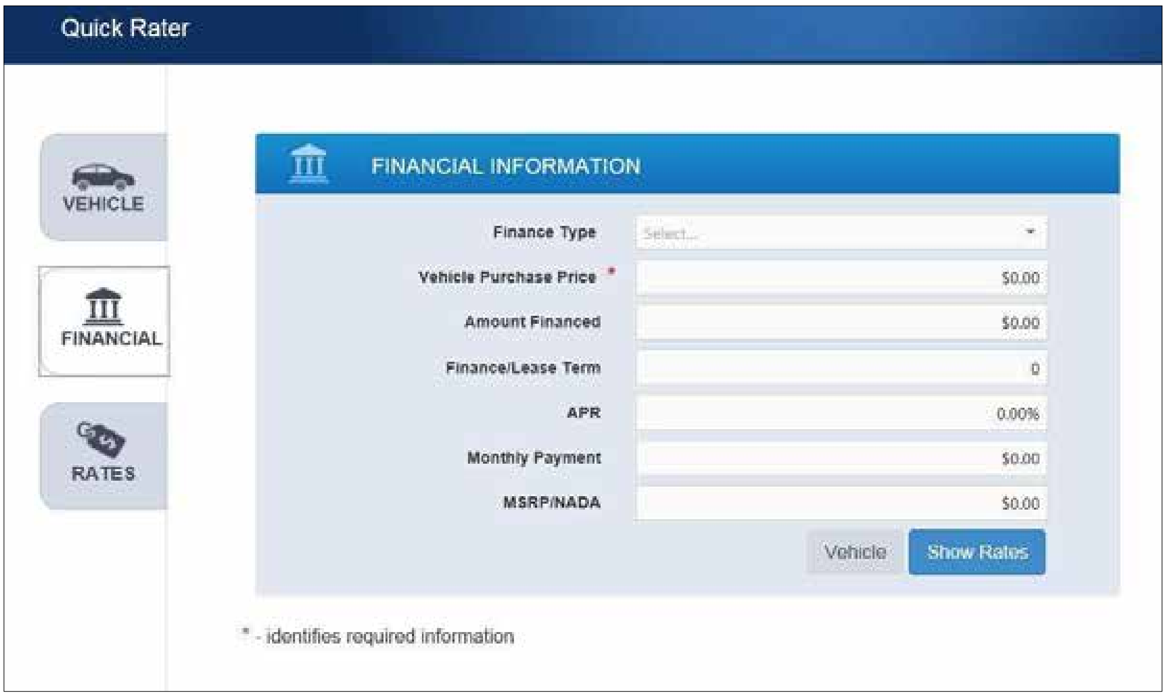
2. **Enter the Vehicle Information**
   The first screen displayed requires vehicle information to be entered; required fields have a red asterisk next to them. The "Year", "Make", and "Model" are all required, but can be decoded when the "VIN" is entered and the fields will automatically populate the information.



QUICK RATER (CONTINUED)

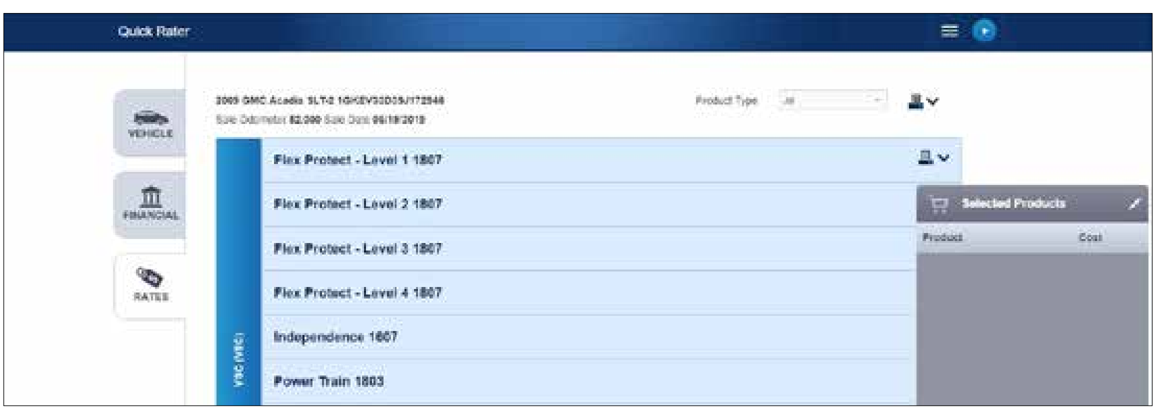
3. Enter Financial Information

Once you have entered the "Vehicle Information", click on the "Financial" button to navigate to the "Financial Information" screen. The only field required in this screen is the "Vehicle Purchase Price".



4. View Rates

When both "Vehicle Information" and "Financial Information" have been entered, click on the "Show Rates" button to display pricing for the eligible coverages.



QUICK RATER (CONTINUED)

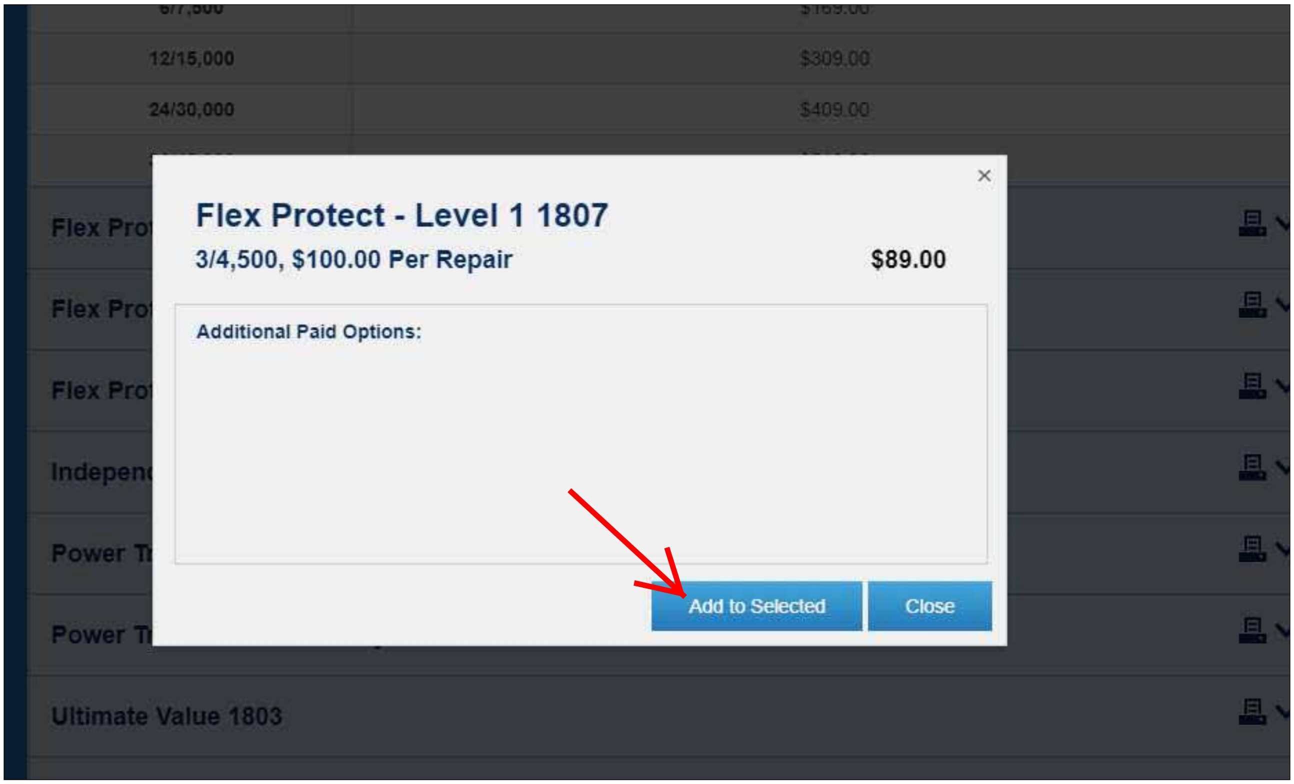
5. Depending on the size of your screen, the cart may be in the way of the drop-down arrows. Press the collapse button at the top right of the cart in order to minimize the window.

6. **Expand Rates**
Rates can be expanded to be viewed by using the drop-down arrows on the right. Rating for an individual product can be expanded, or all can be expanded using the upper most arrow. The Printer icon located next to the drop-down arrow can be used to print out a summary of coverage for a quote.

7. When hovering over a coverage option, a "+" button will appear in the row. Click on the button in order to bring up a preview pop-up of the coverage.

QUICK RATER (CONTINUED)

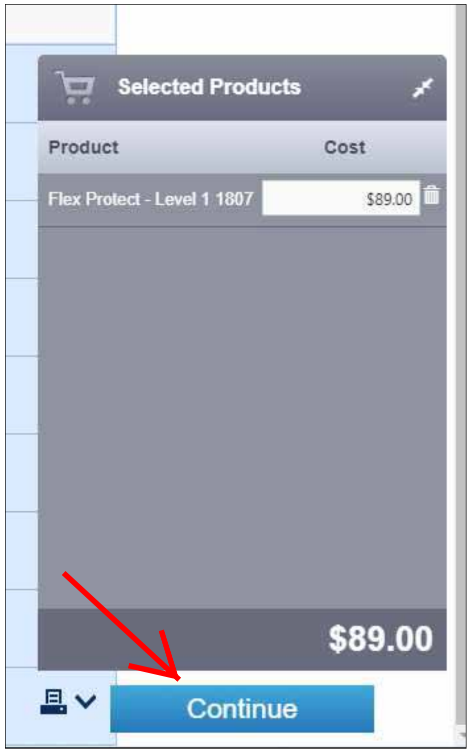
8. In this pop-up you will see the type of coverage you have selected, the term, and the cost of the coverage. If everything is correct, and the customer would like this coverage, click the "Add to Selected" button to add that coverage to your cart.



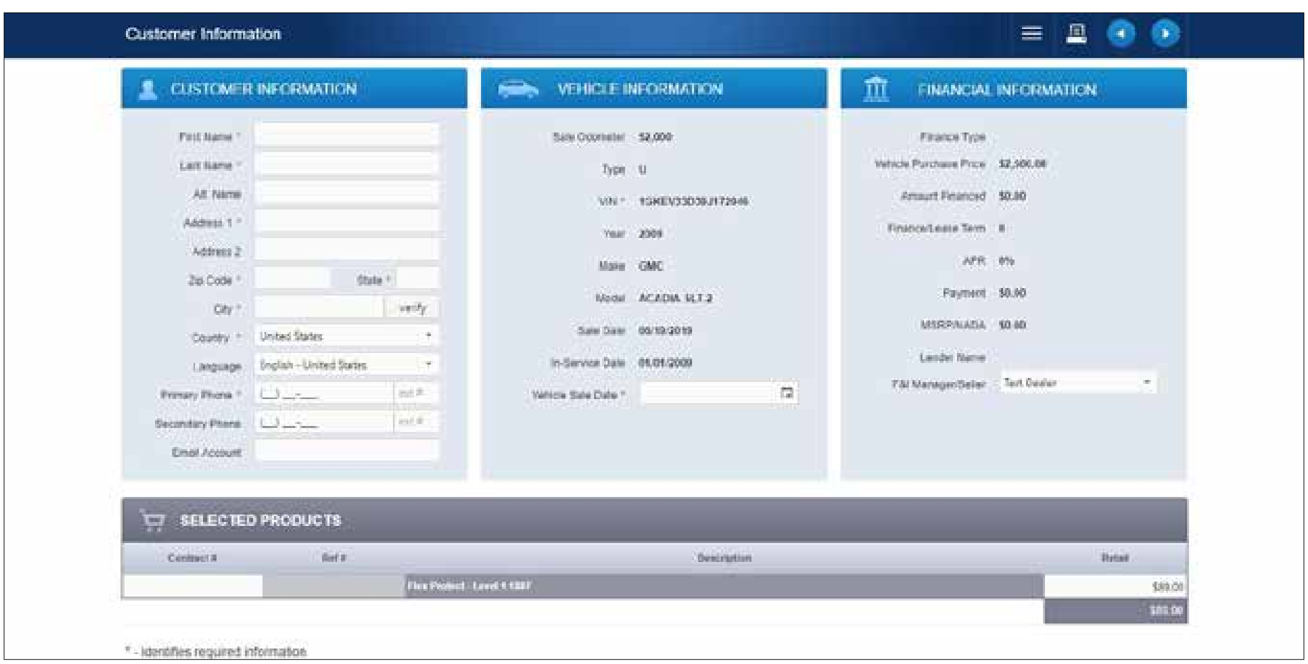
9. Once you've added the coverage to your cart, click the cart button in the bottom right of the screen to bring up your currently selected coverage.

QUICK RATER (CONTINUED)

10. With your cart pulled up, click the "Continue" button to go to the "Customer Information" screen.



11. From this screen you will be able to finish the rest of the contract entry process like normal.

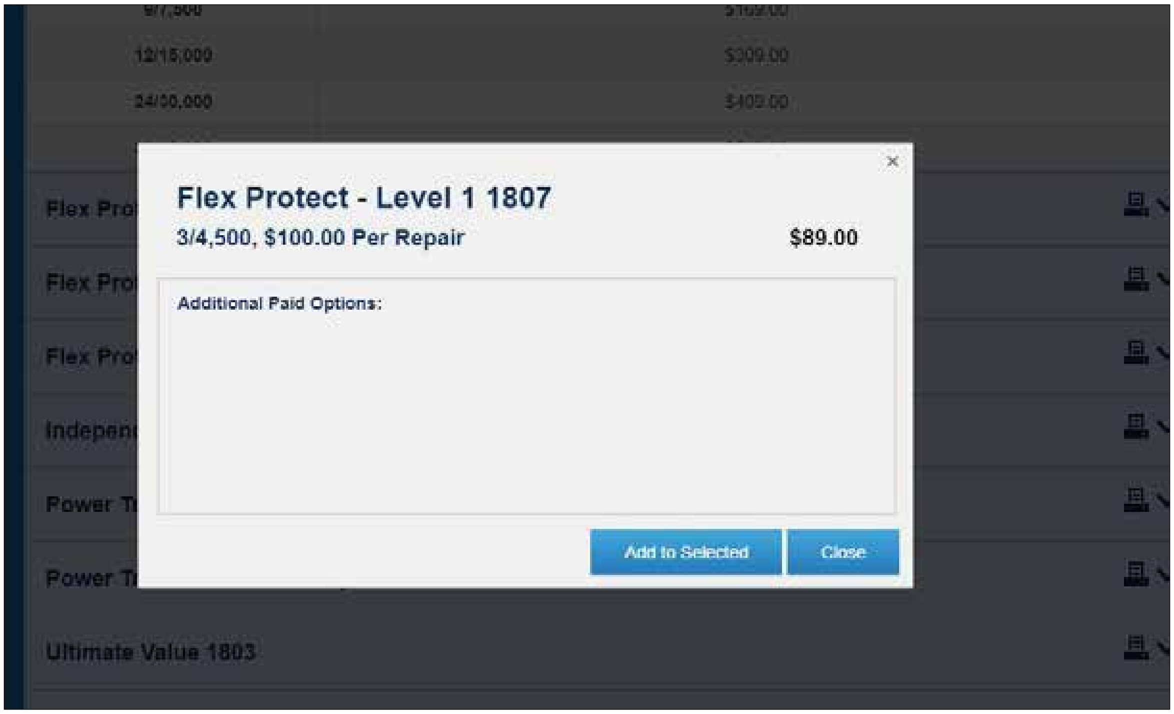


SAVING A QUOTE

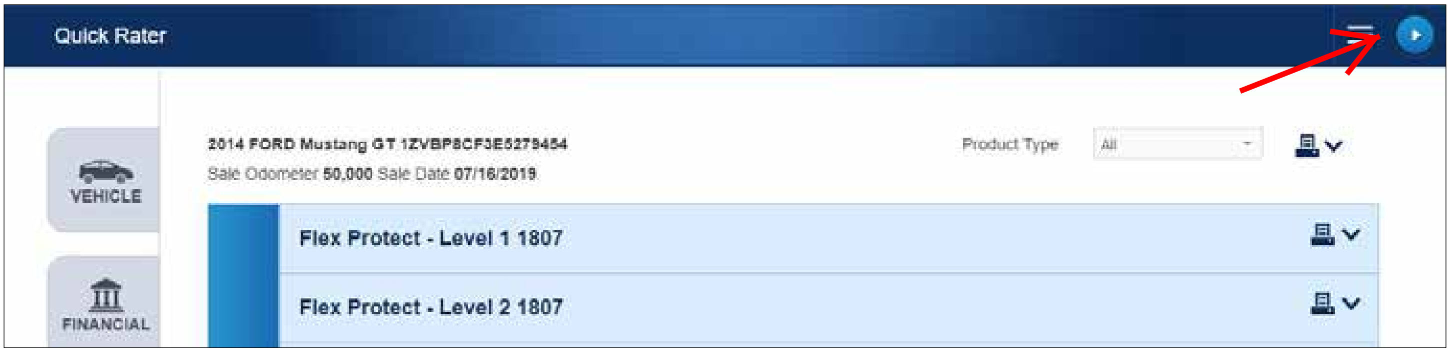
If your customer isn't completely ready to purchase the vehicle, you have an option of saving the quote within the system and bringing it back up whenever you are ready to move forward with the deal.

STEPS TO USE

1. In the "Vehicle Information" section, fill out the "Vehicle Information", "Financial Information", and select a product to get the rate pulled up.

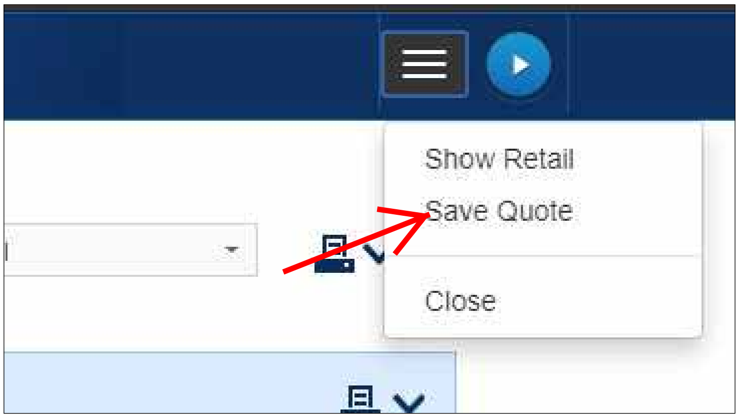


2. Once you click the "Add to Selected" button, the rate can be saved. In order to save the quote, click the three-bar menu at the top of the screen.

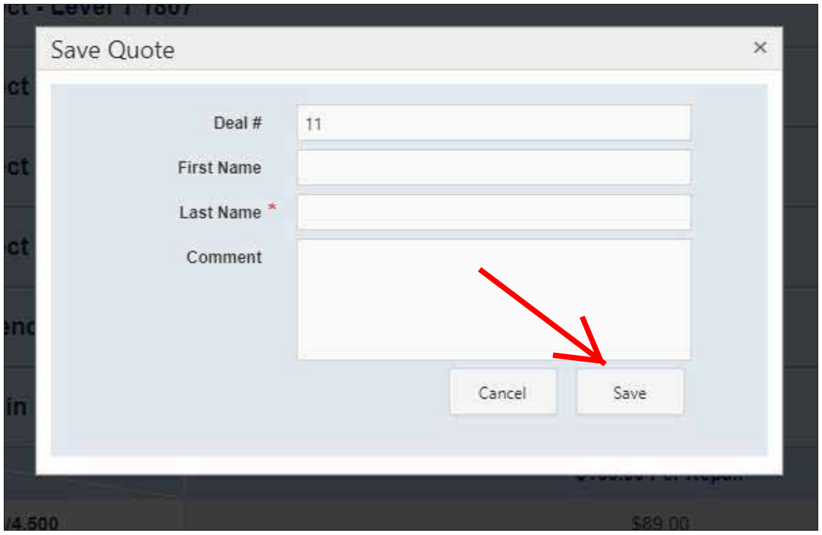


SAVING A QUOTE (CONTINUED)

3. When you click the menu, a drop-down will appear with the options "Show Retail", "Save Quote", and "Close". Click the "Save Quote" option.



4. Once you choose to save the quote, a pop-up window will appear asking you to fill out the "Deal #", "First Name", and "Last Name" of the customer. Only the "Last Name" is required, but you will need a "Deal #" in order to search for the saved quote later. Once you've filled out all the information, click the "Save" button.



SEARCH CONTRACT

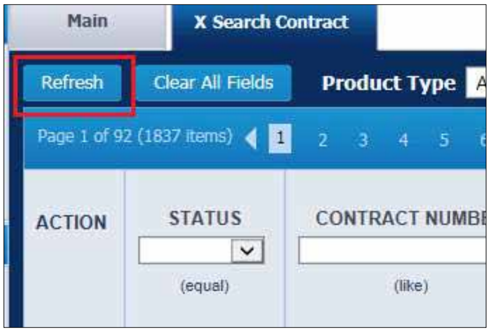
The CARS Dealer Portal gives visibility into any of your contracts received by CARS, in any state. Contracts can be searched for & viewed, regardless of if the contract is in-force or not.

STEPS TO USE

1. **Open Search Contract**
   The Search Contract tool can be found in the menu bar on the left of the screen under “Contract”. Clicking on the “Search Contract” link will open a new tab in the Dealer Portal main screen.

2. **Search for a Contract**
   After you click the “Search Contract” link, a tab will be opened showing multiple search criteria and all your entered contracts with the most recent entry at the top. Any of the criteria can be used to search for contracts.

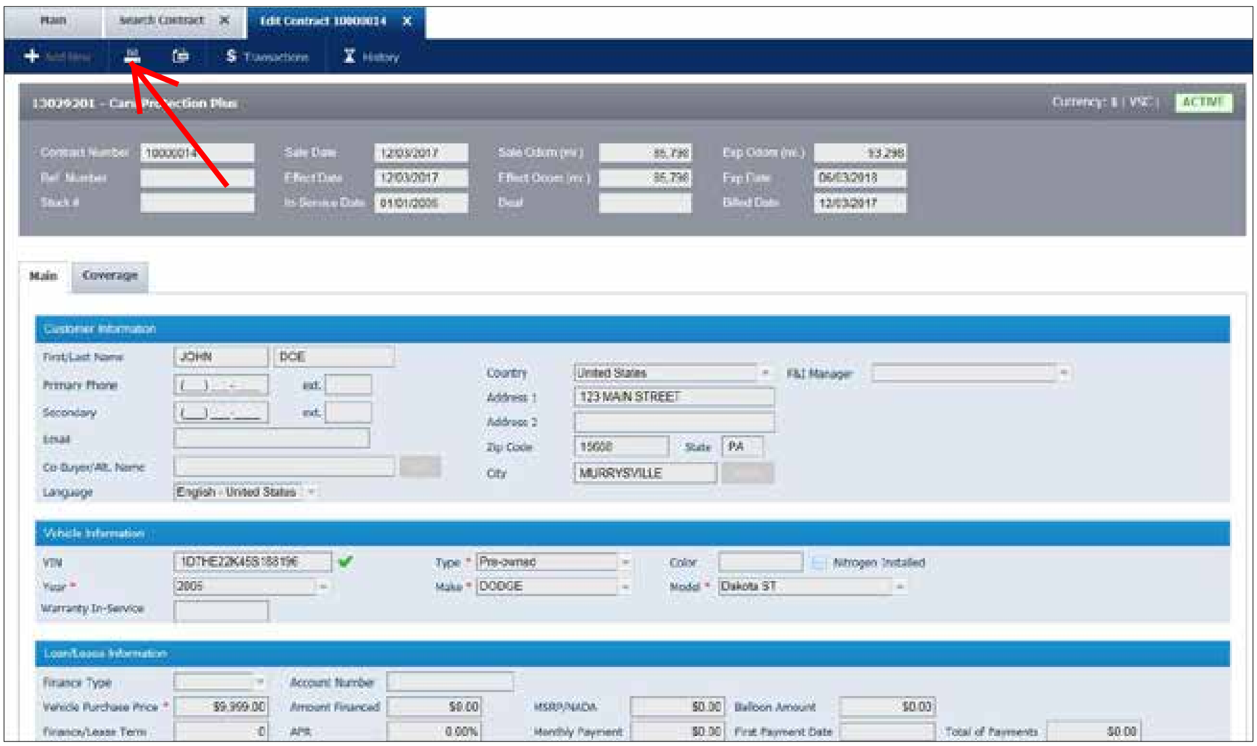
   When you’ve entered the criteria you want to use to search, click the “Refresh” button at the top left of the screen. Please note, more fields are likely available to search by, using the scroll bar at the bottom of the window.



SEARCH CONTRACT (CONTINUED)

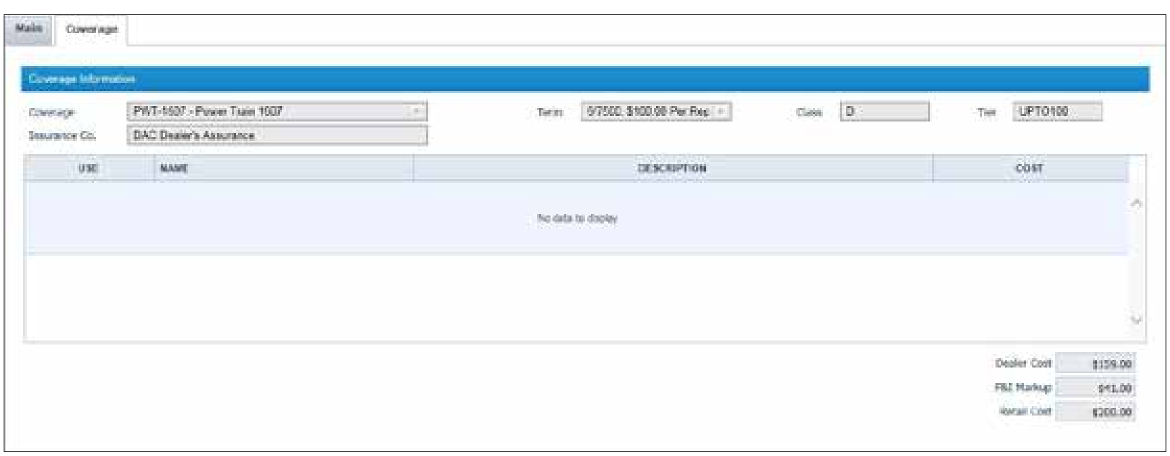
3. View Contract

To view the contract, click on the Contract Number. The contract will open a new tab in the Dealer Portal main screen. The contract information displays in the Main tab, including customer, vehicle, and loan/lease information. If you wish to print out a copy of the contract, click the Printer icon in the top bar menu.



4. View Coverage

Coverage information can be viewed under the Coverage tab. You will see the coverage, term, mileage, dealer cost, and retail cost of the contract.

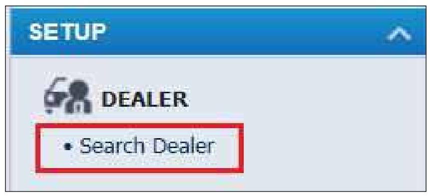


SEARCH DEALER

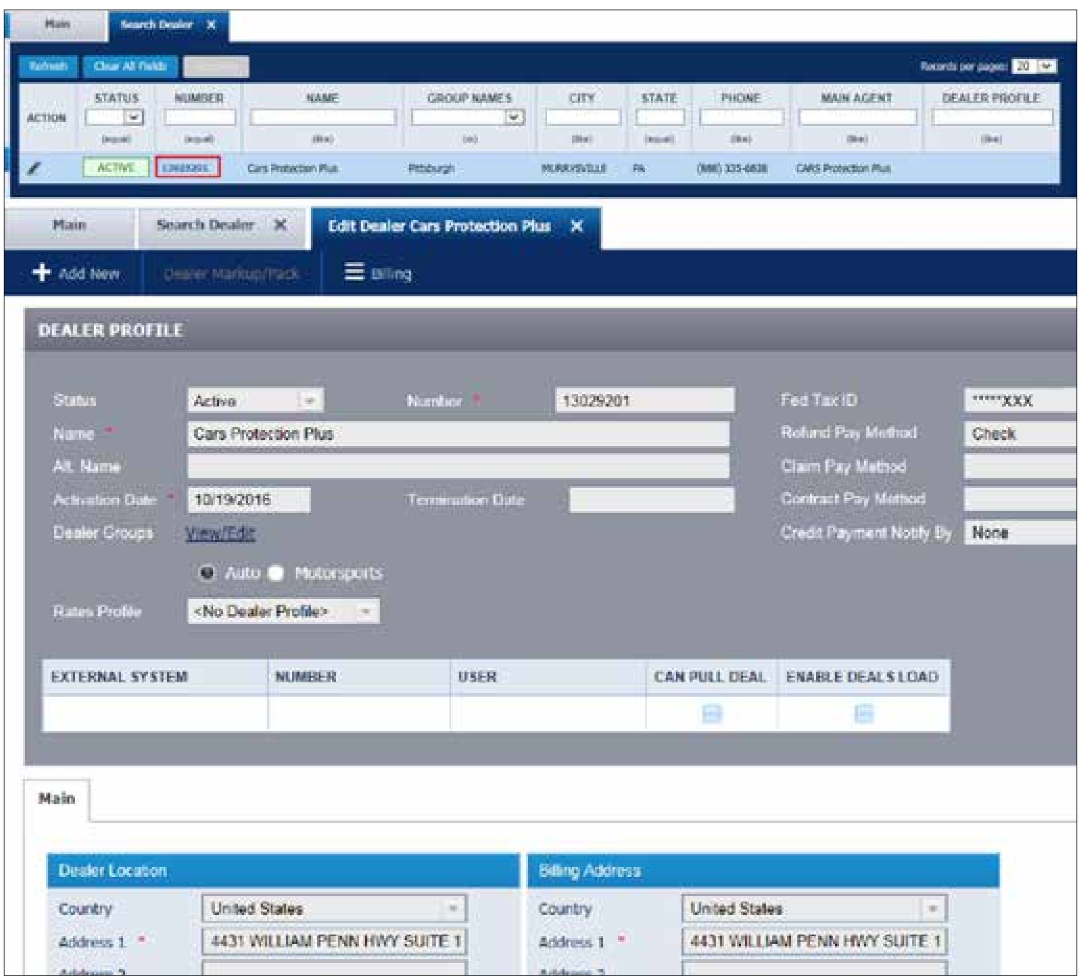
The CARS Dealer Portal gives you the ability to verify your current contact information.

STEPS TO USE

1. **Open Search Dealer**
   The Search Dealer tool can be found in the menu bar on the left of the screen under "Dealer". Clicking on the "Search Dealer" link will open a new tab in the Dealer Portal main screen.



2. **View Dealer Information**
   To view "Dealer Information", click on the "Dealer Number". "Dealer Information" will open a new tab in the "Dealer Portal" main screen.



SALES SUMMARY REPORT

The Sales Summary Report shows Month-to-Date and Year-to-Date sales data for a Dealer's CARS VSC business. The report displays the Dealer Cost, Dealer Mark-up, Dealer Profit, and monthly Contract Detail for a specified time period.

STEPS TO USE

1. **Open the Sales Summary Report:**
   The "Sales Summary Report" can be found in the menu bar on the left of the screen under "Sales". Clicking on the "RPT603-Sales Summary" link will open a new tab in the browser.

2. **Enter Report Parameters**
   To view the report, you must first specify the parameters you wish the report to display. All the following fields need to be populated in order for the report to run:
   a. **Date From**: Start date of the date range you wish the report to reflect; the report periods are specified by month, so the date range of the report will start with the first day of the month selected.
   b. **Date To**: End date of the date range you wish the report to reflect; the report periods are specified by month, so the date range of the report will end with the last day of the month selected.
   c. **F&I Manager**: CARS does not track which F&I manager sells a given contract, thus production is only tracked at the dealership level - please select "All".
   d. **Details**: If "No" is selected, the report will show only summary level data; if "Yes" is selected, the report will show contract level detail supporting the summary; details can only be pulled if a single month is chosen as the date range.
   e. **Contracts By**: "Bill Date" is the date CARS received funds for a contract; "Entry Date" is the date your dealership enters the contract into the policy administration system; "Sale Date" is the effective date of the contract. If you choose to search by entry or sale date, the report will bring back all contracts, including ones that are rejected, pending, and voided. For the best results, search by "Bill Date".

SALES SUMMARY REPORT (CONTINUED)

3. Run the Report
When all parameters are specified, you may run the report by clicking the "View Report" button.

4. Review Report Summary
The report has two separate Summary Sections:

a. **Account Balance/Period Summary**: 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.
c. **Report Data**: The following data populates based on the report parameters specified:
   i. **Gross Contract Count**: Number of contracts, not accounting for cancellations.
   ii. **Dealer Net Rate**: Total Dealer cost to CARS.
   iii. **Retail**: Total retail price paid by the end customer for the contract.
   iv. **Up Front Profit**: Contract Retail price less Dealer Net Rate.

5. Review Report Detail
If the report is run with Details (Details can only be pulled if a single month is selected in the Date From and Date To fields), contract detail is populated to support the summary data:

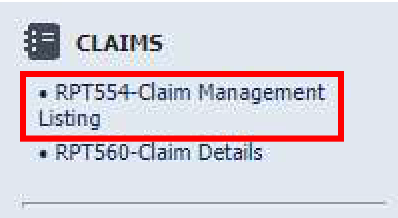
a. **Tran Type**: NB is 'New Business' which is any net new contract accepted by CARS; A is 'Adjustment' which is any rerate that has been applied to a contract (an upgrade of coverage shows a positive number, a downgrade of coverage shows a negative number).
b. **Contract Number**: Identification number of the customer's contract.
c. **VIN**: Vehicle VIN Number covered by the contract.
d. **New/Used**: Indicates if the covered vehicle is new (N) or used (U).
e. **Contract Sale Date**: The contract's effective date.
f. **Customer Last Name**: Last name(s) of the individual(s) covered on the contract.
g. **Coverage**: Name and CARS form number of the customer's coverage.
h. **Term/Deduct**: Term (months) and the claim deductible for the contract.
i. **Dealer Net Rate**: The dealer cost of the contract.
j. **Retail**: The retail price the customer paid for the contract.

CLAIM MANAGEMENT LISTING REPORT

The Claim Management Listing Report is a tool that you can use in order to look at your overall claim information through CARS. Information such as the status of a claim, what agent is assigned to a specific claim, the coverage on the vehicle, and how much the claim will pay out.

STEPS TO USE

1. **Open the Claim Management Listing Report**
   The Claim Management Listing Report can be found in the menu bar on the left of the screen under "Claims". Clicking on the "RPT554-Claim Management Listing" link will open a new tab in the browser.

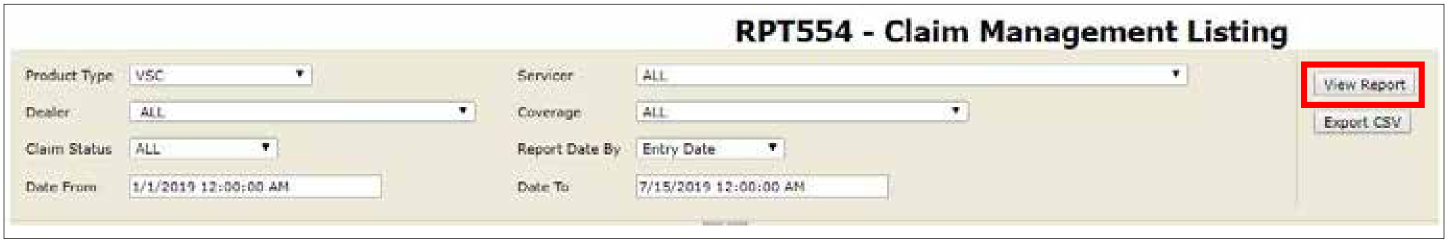


2. **Enter Report Parameters**
   To view the report, you must first specify the parameters you wish the report to display. All the following fields need to be populated in order for the report to run:
   a. **Product Type**: The products offered by CARS that you are looking to search by. ''VSC" or "GAP" are the only options you will be able to filter by to bring back your full list of claims.
   b. **Servicer**: The name of the shop where the repairs were completed to the vehicle.
   c. **Dealer**: Dealership which sold the original service contract.
   d. **Coverage**: What type of contract was sold to the customer. "ALL" will automatically fill in to include all types of coverage with your search.
   e. **Claim Status**: The point where your customer's claim is within the claims process. You can sort by approved claims, denied claims, pending claims, etc. Sorting by "ALL" Claim Status is recommended.
   f. **Report Date By**: The event date you wish to sort your claims by. You can sort by Claim Entry Date, Claim Paid Date, or Claim Service Date. Sorting by Claim Paid Date is recommended.
   g. **Date From**: Start date of the date range you wish the report to reflect. Can be any specific date throughout the year.
   h. **Date To**: End date of the date range you wish the report to reflect. Can be any specific date throughout the year.

CLAIM MANAGEMENT LISTING REPORT (CONTINUED)

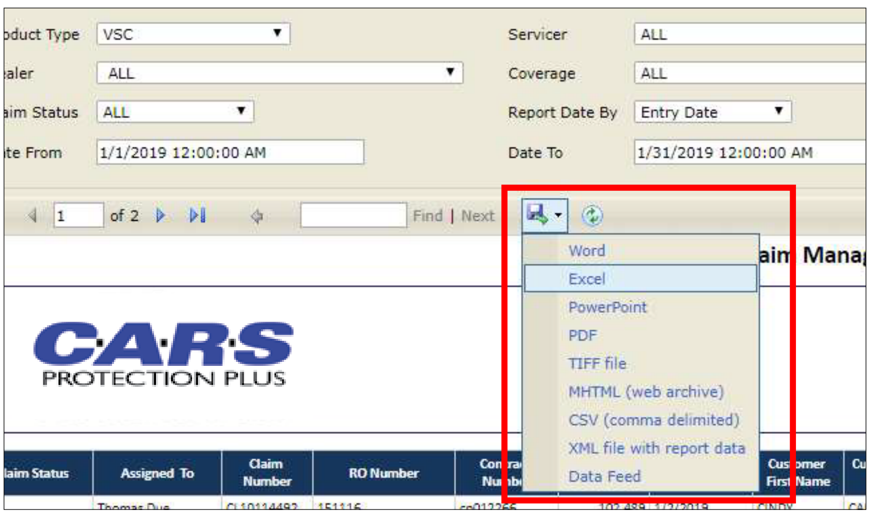
3. Run the Report

When all parameters are specified, you may run the report by clicking the View Report button.



4. Exporting the Report

Once the report is pulled, you can export the report into different file types, including Microsoft Word, Microsoft Excel, or a PDF file.

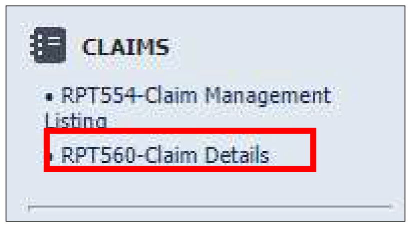


CLAIM DETAILS REPORT

The Claim Details Report is used in order to see the total dollar amount that is being paid out by CARS for a claim. The dealer, servicer, and vehicle information are all included in the report as well as service type and parts included within the claim.

STEPS TO USE

1. **Open the Claim Details Report**
   The Claim Details Report can be found in the menu bar on the left of the screen under “Claims”. Clicking on the “RPTSGO-Claim Details” link will open a new tab in the browser.



2. **Enter Report Parameters**
   To view the report, you must first specify the parameters you wish the report to display. All the following fields need to be populated in order for the report to run:
   a. **Dealer Group Type**: Type of dealer filter based on zone or territory. Leaving to “ALL” is recommended when pulling reports.
   b. **Report Group**: The product type that you want to search by. (CARS Direct Protect, Flex Protect, Global Protect, etc.)
   c. **Dealer/Servicer**: Choose if you want to search by the Dealer the contract was purchased from, the Servicer where the vehicle was repaired, or the Payee that CARS will provide the funds to. Searching by Dealer is recommended.
   d. **Name or Number**: The Name or ID Number of the Dealer/Servicer/Payee that you want to search by.
   e. **Entity Selection**: The complete name of the Dealer/Servicer/Payee that you are choosing. (If you sort by a Dealer Number, you MUST select the dealer name in this section.)
   f. **Report Date By**: The event date you wish to sort your claims by. You can sort by Claim Entry Date, Claim Paid Date, or Claim Service Date. Sorting by Claim Paid Date is recommended.
   g. **Date From**: Start date of the date range you wish the report to reflect, can be any specific date throughout the year. Cannot be greater than 32 days from the end date.
   h. **Date To**: End date of the date range you wish the report to reflect, can be any specific date throughout the year. Cannot be greater than 32 days from the start date.

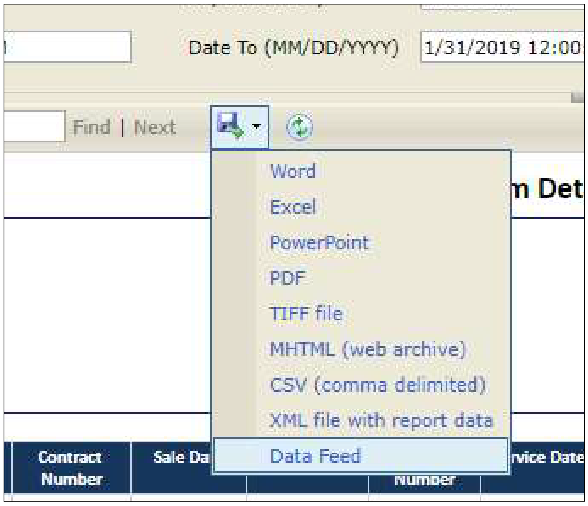
CLAIM DETAILS REPORT (CONTINUED)

3. Run the Report

When all parameters are specified, you may run the report by clicking the "View Report" button.

4. Exporting the Report

Once the report is pulled, you can export the report into different file types, including Microsoft Word, Microsoft Excel, or a PDF file.



GAP COVERAGE

Through CARS you can offer GAP coverage to your customers. In the event of the covered vehicle being totaled, GAP will cover the difference between what your customer owes on their vehicle and the amount their insurance company is willing to pay towards the vehicle.

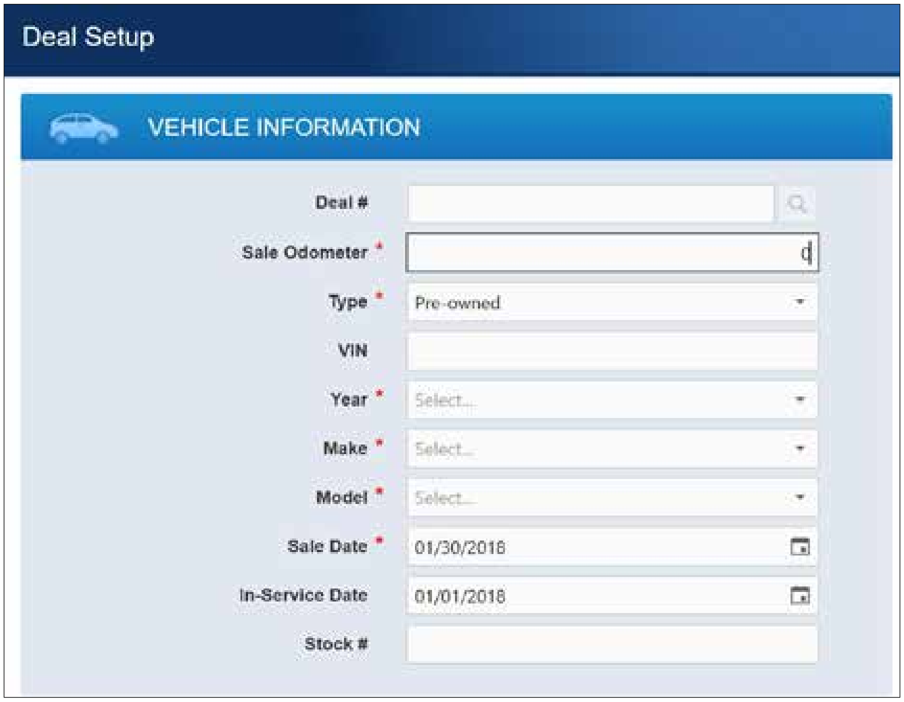
STEPS TO USE

1. **Open Add Contract**

   The "Add Contract" tool can be found in the menu bar on the left of the screen under "Contract". Clicking on the "Add Contract" link will open a new tab in your browser. If no new tab opens, watch for a flash in the top right corner of your screen when you click "Add Contract". An icon should appear which you will click and select "Always allow pop-ups from this site." Let us know if this doesn't resolve the issue.

2. **Enter the Vehicle Information**

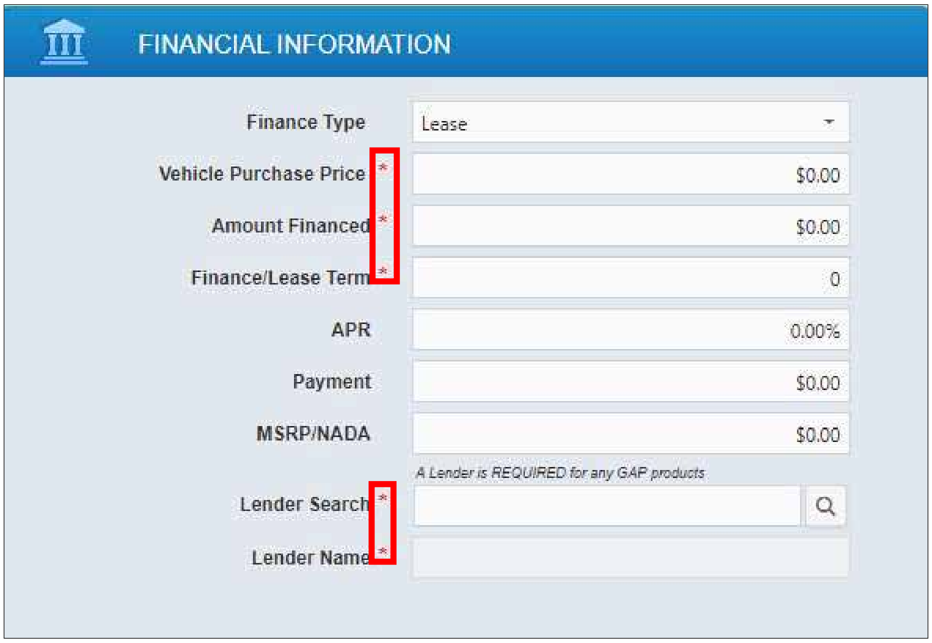
   The left side of the screen requires vehicle information to be entered; required fields have a red asterisk next to them. The "Year", "Make", and "Model" are all required, but can be decoded when the VIN is entered, and the fields will automatically populate the information. "Sale Date" is the date you enter the contract. This is not the "Vehicle Sale Date". You will have the opportunity to add a vehicle purchase date later. Please note, the "Sale Date" cannot be backdated.



GAP COVERAGE (CONTINUED)

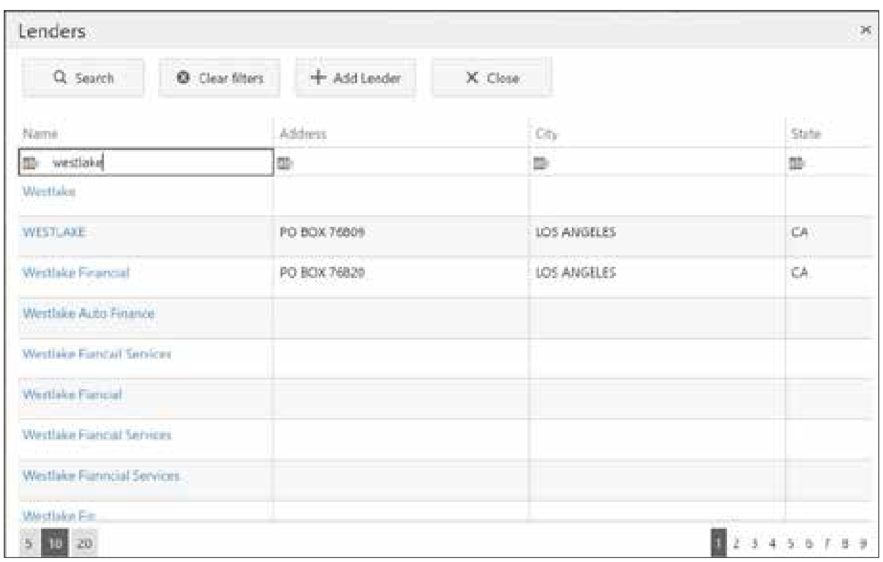
3. Enter the Financial Information

To be able to select GAP coverage, the “Finance Type” field needs to be filled in with either “Loan” or “Lease”. Once you have selected one of these types of financing, the “Amount Financed”, “Finance/Lease Terms”, “Lender Search” and “Lender Name” fields become required. Even though they aren’t required, it is recommended to fill out the “APR” and “Payment” (monthly payment for the vehicle) fields as well.



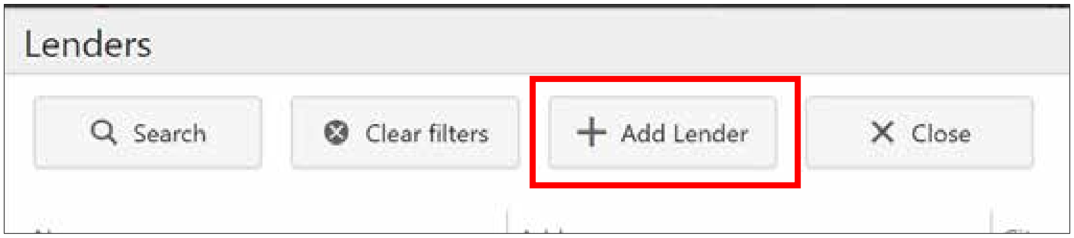
4. Lender Search

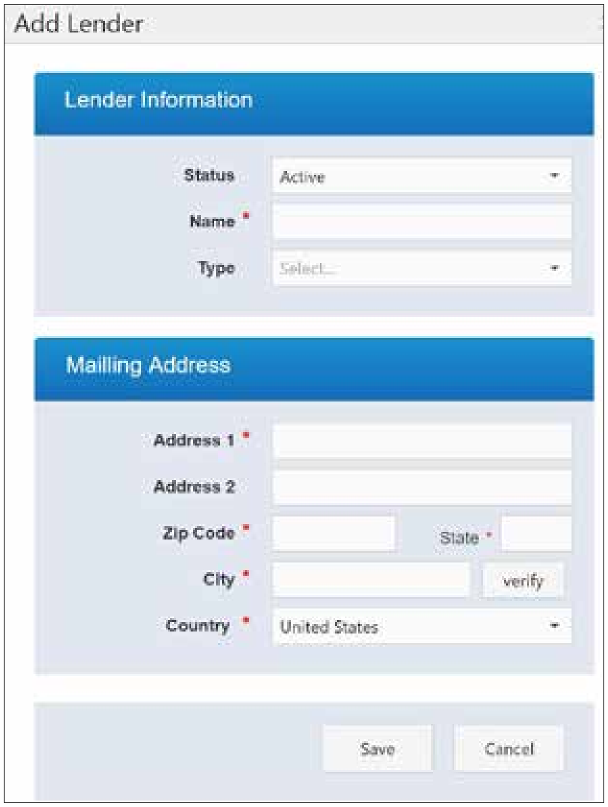
Click the magnifying glass and you can type in the name of your lender to see if it already exists in our system.



GAP COVERAGE (CONTINUED)

5. **Add Lender**
   If your lender is not yet in our database, click the "Add Lender" icon and then enter the required information.



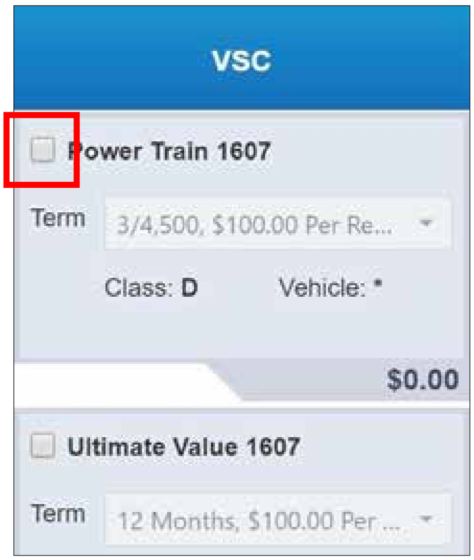


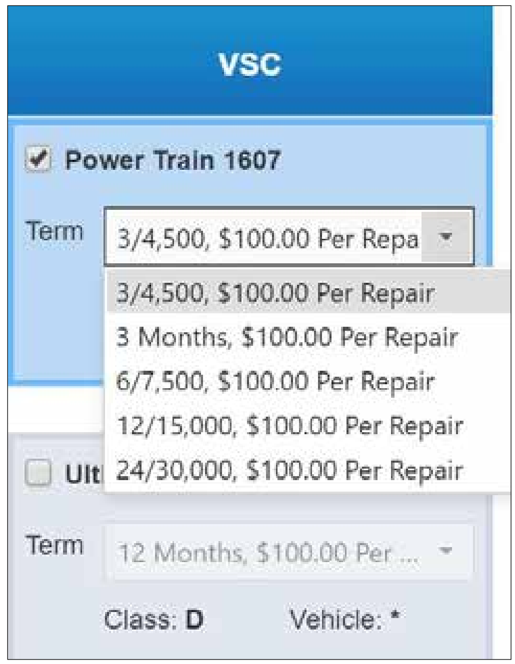
6. After you have entered all the Vehicle and Financial information, use the blue arrow in the top right corner to advance to the next page.

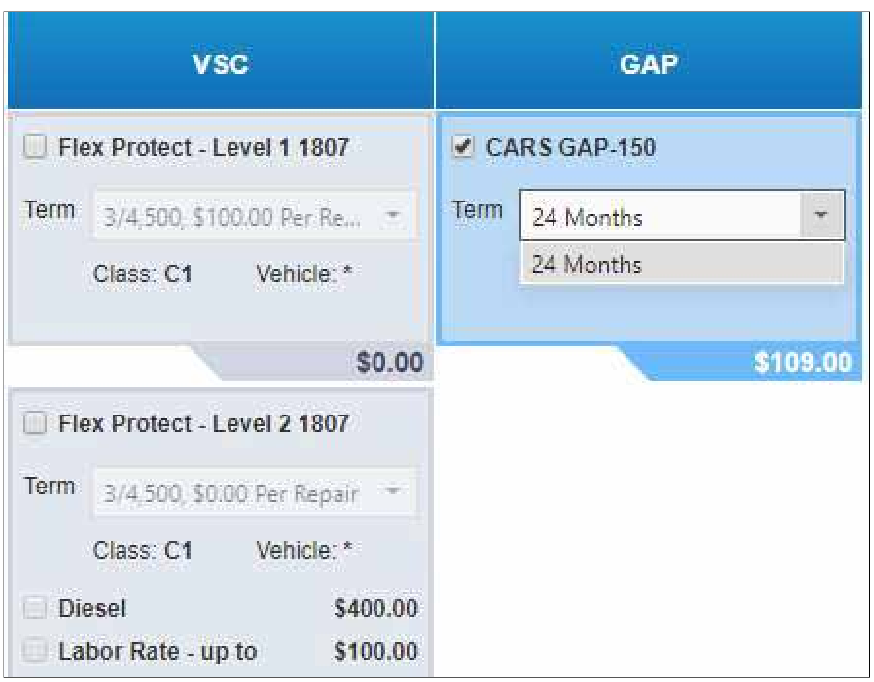
GAP COVERAGE (CONTINUED)

7. Select Products

The next page will return the entire list of VSC and GAP products for which the vehicle is qualified. Each box represents a different coverage. Once you select a program's checkbox, you will be able to pick the term you want from the drop-down. The GAP options will be listed to the right of the VSC coverage options and will only have a term available that matches the financing term for the vehicle.



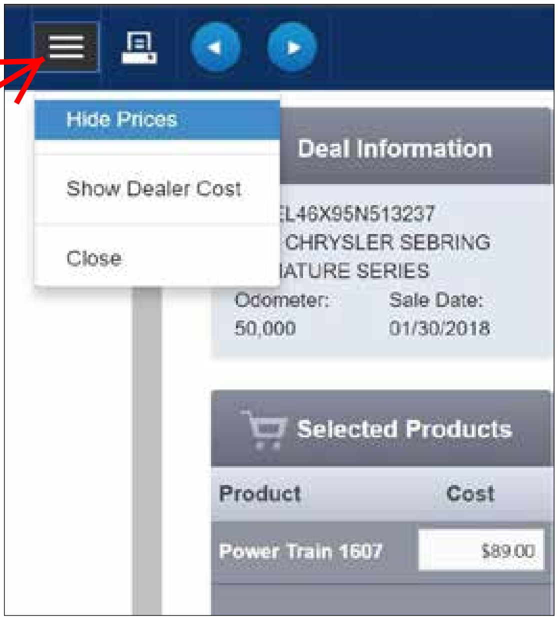




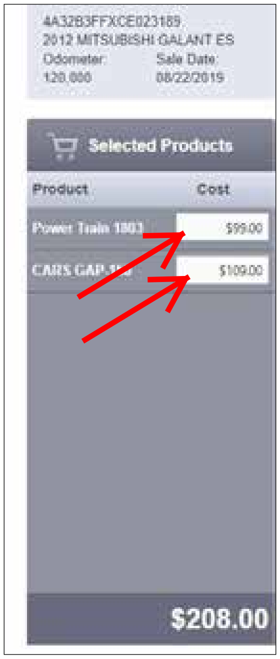
GAP COVERAGE (CONTINUED)

8. View Product Pricing

The price of the program will be displayed on the right. You can switch between the Dealer Cost and the Retail price by clicking the indicated icon and choosing “Show Dealer Cost” or “Show Retail”.



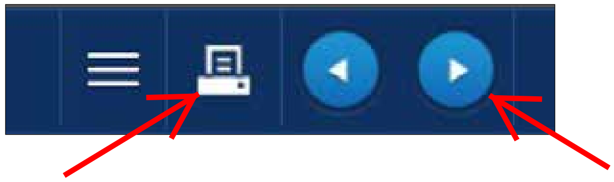
9. If you choose “Show Retail”, the boxes underneath the Cost header of the Selected Products section will be white, and you will be able to edit the amount your customer is being charged for each contract. The total sum of the two programs will be shown at the very bottom of the column.



GAP COVERAGE (CONTINUED)

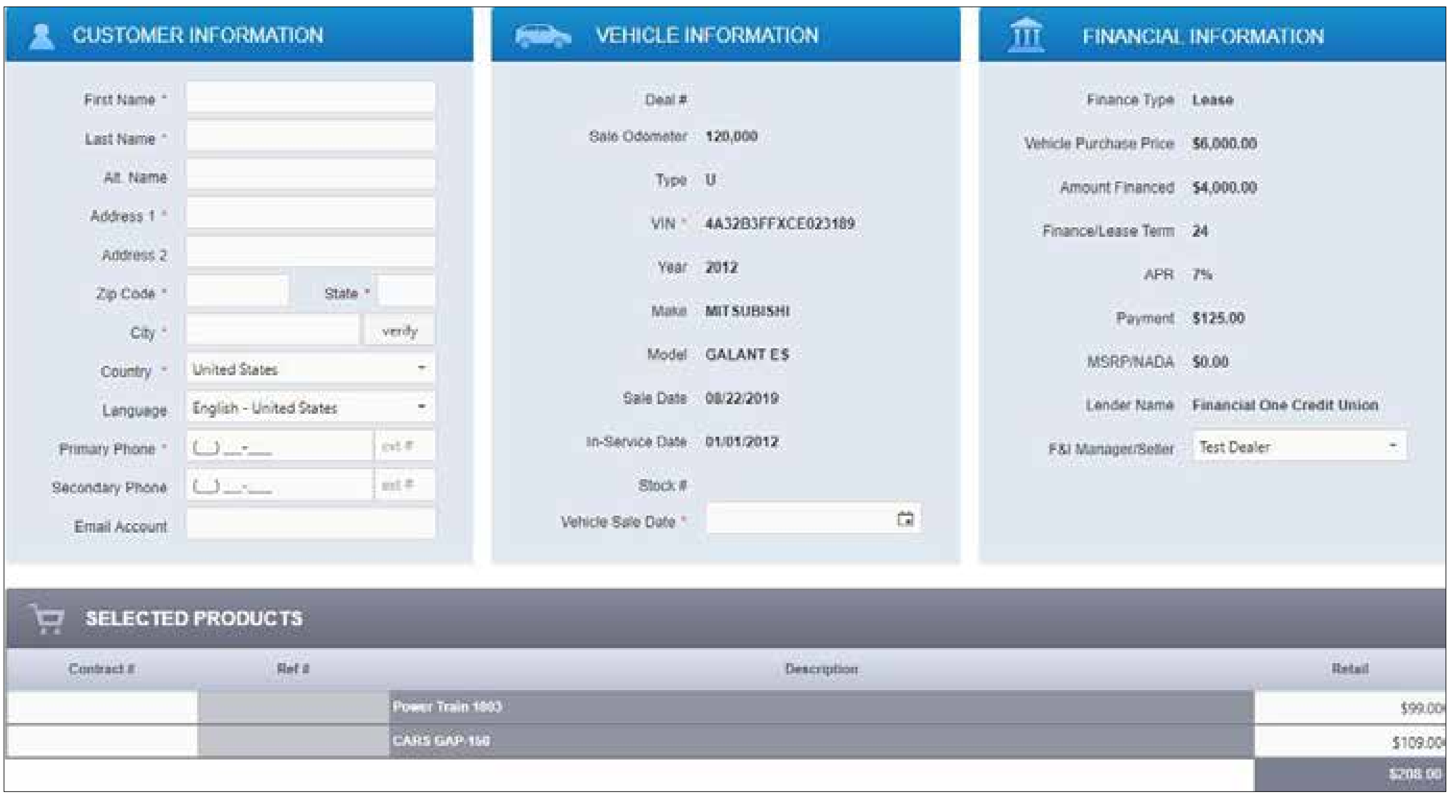
10. Continuing to Customer Information

You can use the Printer icon to print a quote or the right arrow to proceed.



11. Customer Information

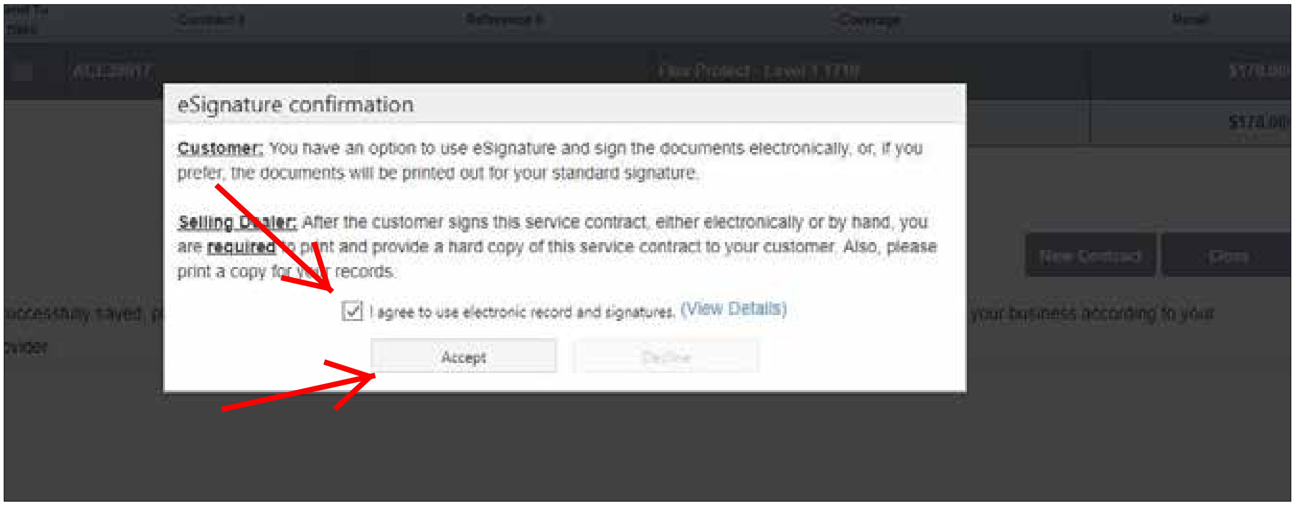
Enter all the required customer information. At this point you will have one last opportunity to edit the "Retail" price if you did not choose to earlier.



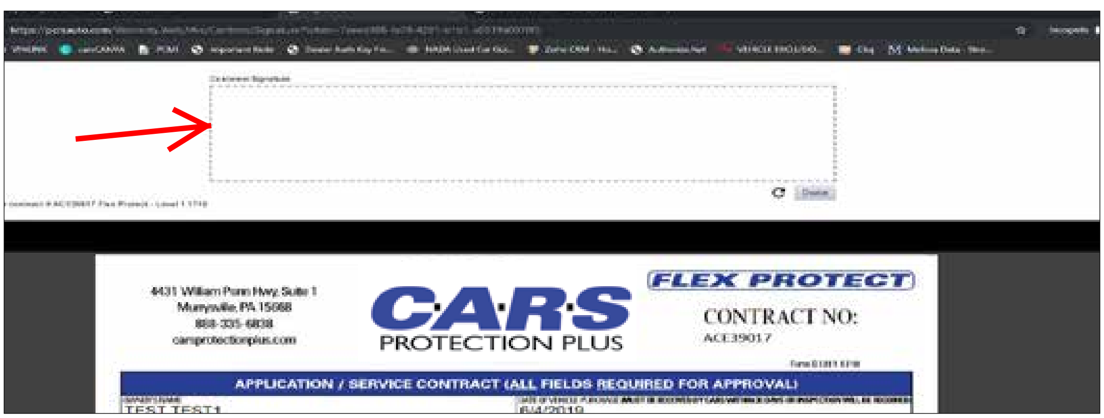
12. You can use the Printer icon to preview a sample version of the contract or the right arrow to SUBMIT the contract. Once submitted, you cannot change the contract. If you've made a mistake and need a correction, call our Sales department at 888-335-6838 or email sales@carspp.com.

GAP COVERAGE (CONTINUED)

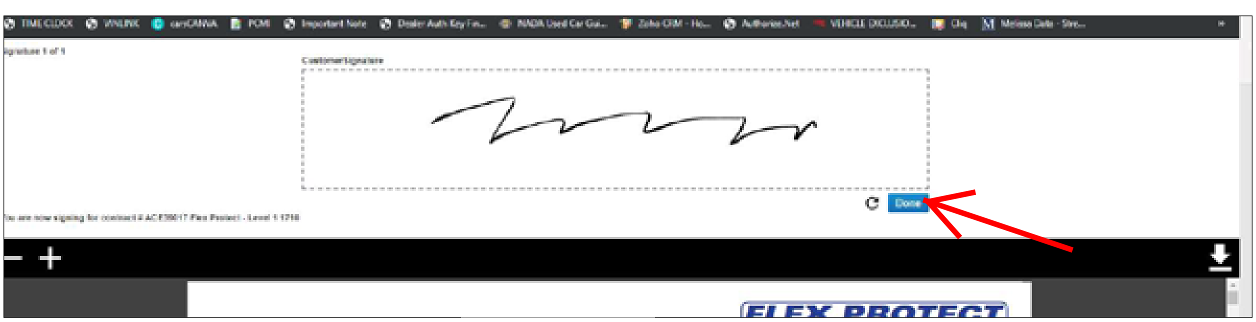
13. Once you submit the contract, a message box will pop-up informing your customer of their option to sign the contract using the eSignature function. If they choose to use this function, check the agreement box and then click the “Accept” button.



14. After clicking the “Accept” button, you will be redirected to a screen with a signature field displayed at the top and a copy of the VSC contract shown below. The customer can now use the mouse to sign within the box.



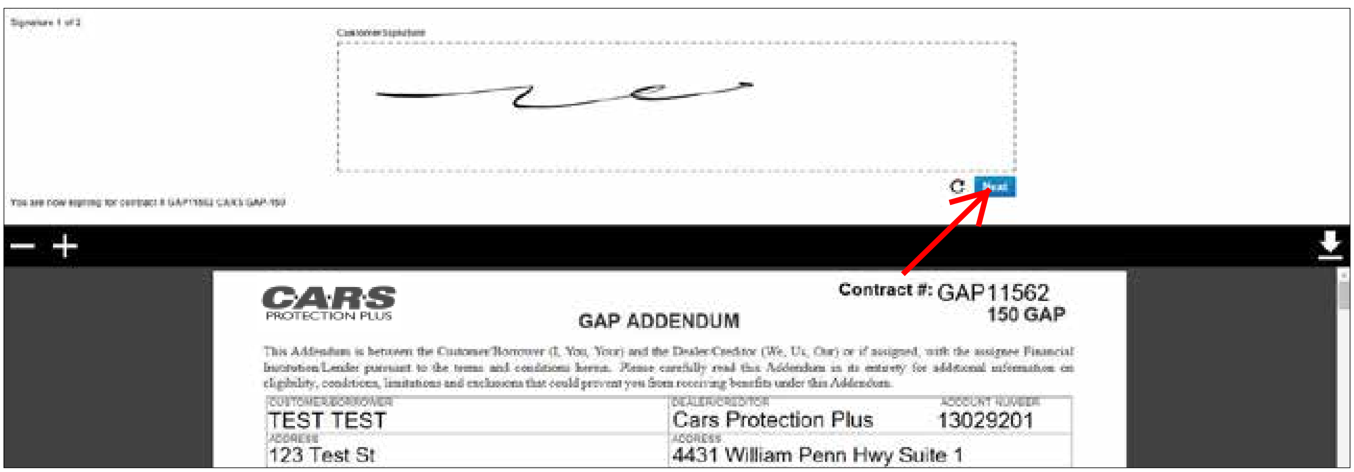
15. Once the customer has signed, the “Done” button will turn blue and can be clicked.



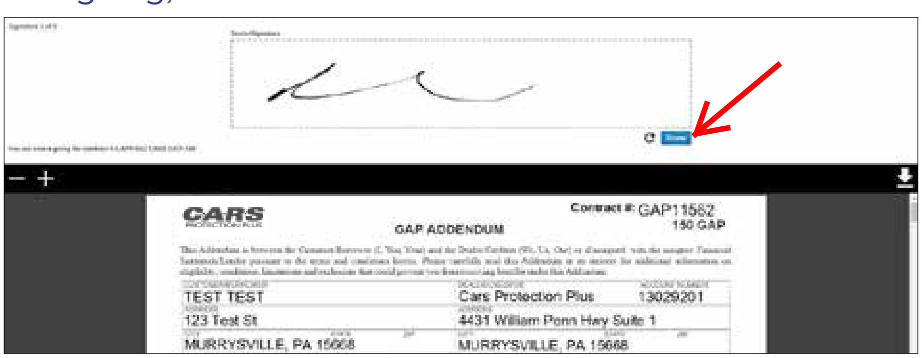
GAP COVERAGE (CONTINUED)

16. After you have clicked the "Done" button, the page will be reloaded, and the signature should appear at the bottom of the contract on the signature line. A second button saying "Next Document" will appear. Click this to be taken to the next section requiring a signature.

17. This new screen will display the GAP contract below a signature box requesting the "Customer Signature". Once the customer signs, the "Next" button will turn blue and can be clicked.



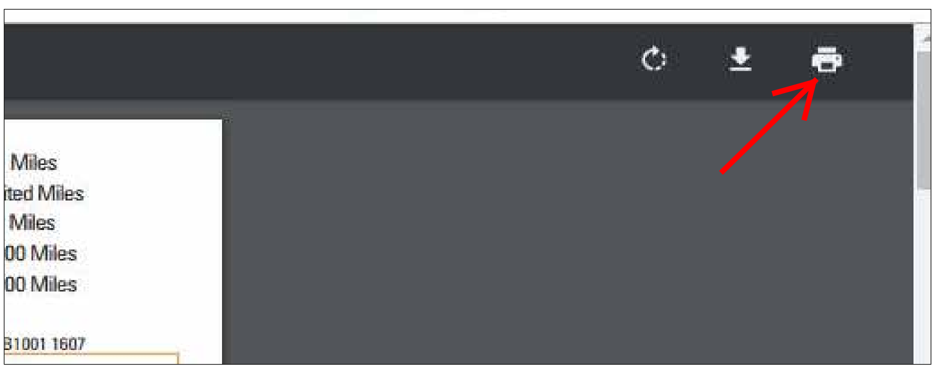
18. The next box to appear is for the "Dealer Signature" be sure to sign this yourself before continuing. After signing, the "Done" button will turn blue and can be clicked.



GAP COVERAGE (CONTINUED)

19. After you have clicked the “Done” button, the page will be reloaded, and both signatures should appear at the bottom of the contract on the signature lines. A second button saying ‘’View and Close” will appear. Click this to be taken to a PDF file of both contracts.

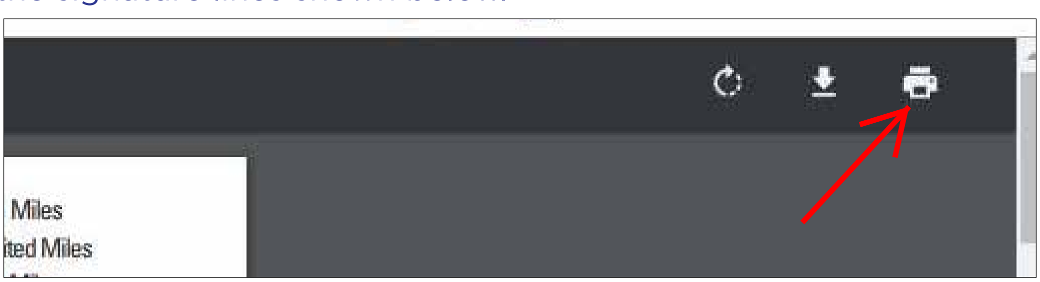
20. To print out the PDF for your personal records, click the Printer icon in the top right corner of the screen when it appears.



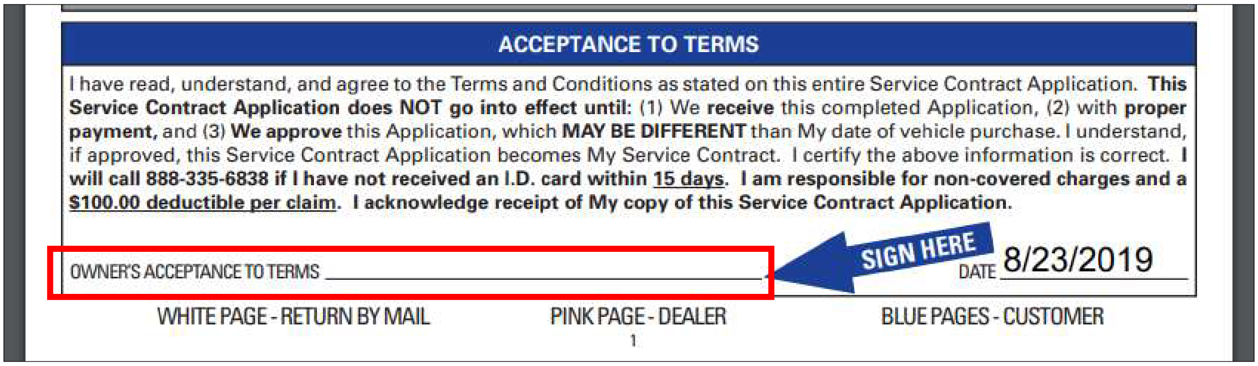
21. If your customer chose to decline the eSignature, you will be taken directly to a new tab with a PDF of the unsigned contracts for you to print out copies for the:

- Customer
- Dealer
- Remittance for CARS

Use the Printer icon in the top right corner of the screen to print out the PDF. Once printed, have your customer sign these copies and sign the GAP copies yourself as well on the signature lines shown below.



GAP COVERAGE (CONTINUED)



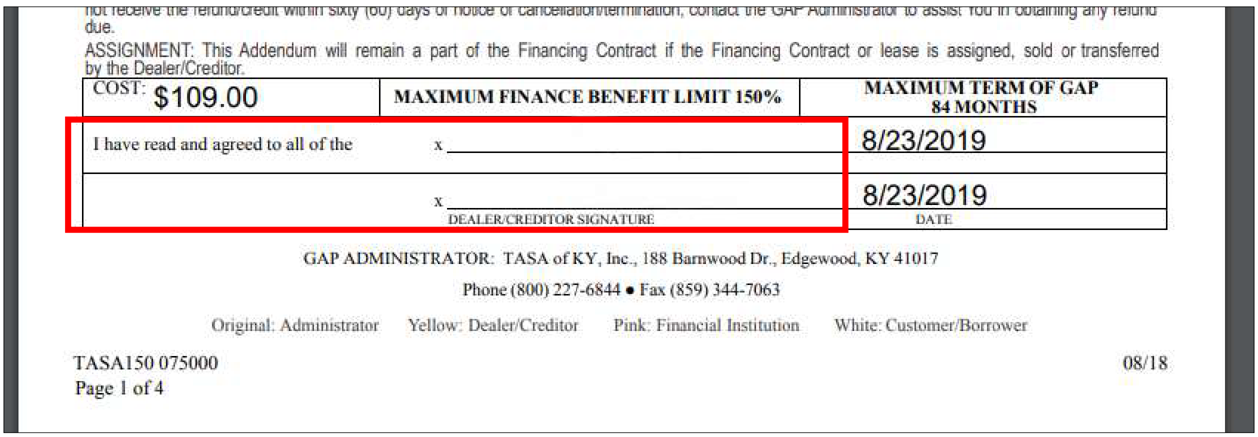
ACCEPTANCE TO TERMS

I have read, understand, and agree to the Terms and Conditions as stated on this entire Service Contract Application. **This Service Contract Application does NOT go into effect until:** (1) We **receive** this completed Application, (2) with **proper payment,** and (3) **We approve** this Application, which **MAY BE DIFFERENT** than My date of vehicle purchase. I understand, if approved, this Service Contract Application becomes My Service Contract. I certify the above information is correct. **I will call 888-335-6838 if I have not received an I.D. card within 15 days. I am responsible for non-covered charges and a $100.00 deductible per claim. I acknowledge receipt of My copy of this Service Contract Application.**

OWNER'S ACCEPTANCE TO TERMS ______________ SIGN HERE DATE 8/23/2019

WHITE PAGE - RETURN BY MAIL   PINK PAGE - DEALER   BLUE PAGES - CUSTOMER

1



not receive the refund/credit within sixty (60) days of notice of cancellation/termination, contact the GAP Administrator to assist You in obtaining any refund due.

ASSIGNMENT: This Addendum will remain a part of the Financing Contract if the Financing Contract or lease is assigned, sold or transferred by the Dealer/Creditor.

COST: $109.00	MAXIMUM FINANCE BENEFIT LIMIT 150%	MAXIMUM TERM OF GAP 84 MONTHS
I have read and agreed to all of the	x	8/23/2019
	x DEALER/CREDITOR SIGNATURE	8/23/2019 DATE

GAP ADMINISTRATOR: TASA of KY, Inc., 188 Barnwood Dr., Edgewood, KY 41017

Phone (800) 227-6844 • Fax (859) 344-7063

Original: Administrator   Yellow: Dealer/Creditor   Pink: Financial Institution   White: Customer/Borrower

TASA150 075000   08/18

Page 1 of 4

22. Once you have printed out the copies you need, exit out of the PDF tab. If you have another contract to enter, use the New Contract icon. Otherwise, click Close to end the process.