USER GUIDE

PCRS+

Step-by-Step Instructions on:

- **Adding Contracts**
- **Remitting Payments**
- **Using Quick Rater**

Sonsio™
Vehicle Protection

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Overview

This User Guide provides step-by-step instructions for adding contracts, remitting payments using Process Register, and using Quick Rater in PCRS+.

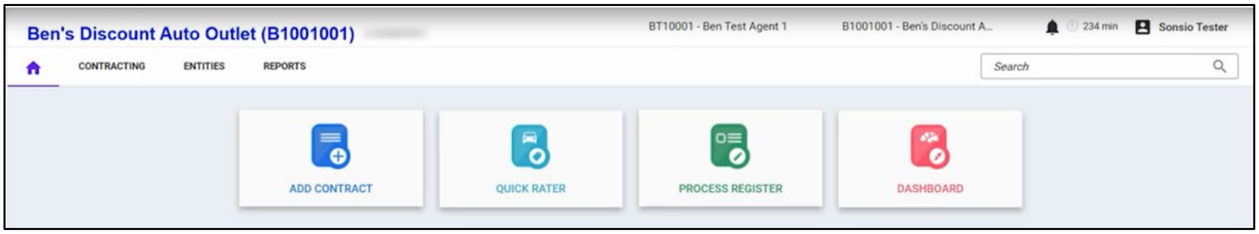
For more detailed visual guidance on these processes, please see the training videos found at: https://www.sonsio.com/training/pcrs

Adding Contracts in PCRS+

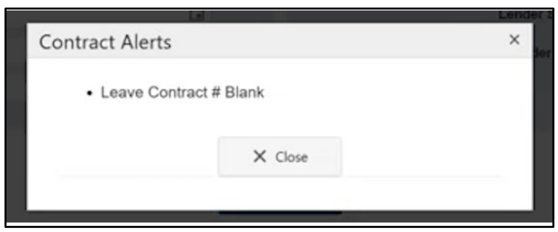
For more detailed visual guidance on adding contracts, please see the videos found at: https://www.sonsio.com/training/pcrs

The Add Contract function allows you to view all eligible products, electronically rate, and create contracts for vehicles.

1. Click the "ADD CONTRACT" button on the PCRS+ home screen.



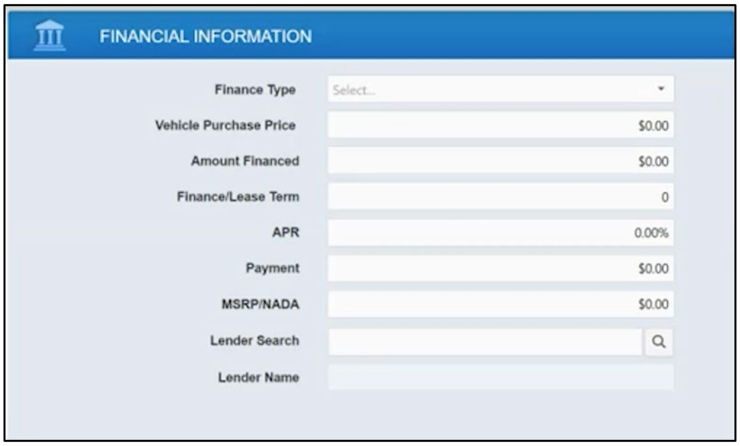
An important alert will pop up reminding you to leave the contract number blank as you are adding the contract information. The contract number will automatically be generated later. Click the "Close" button and exit the alert to continue.



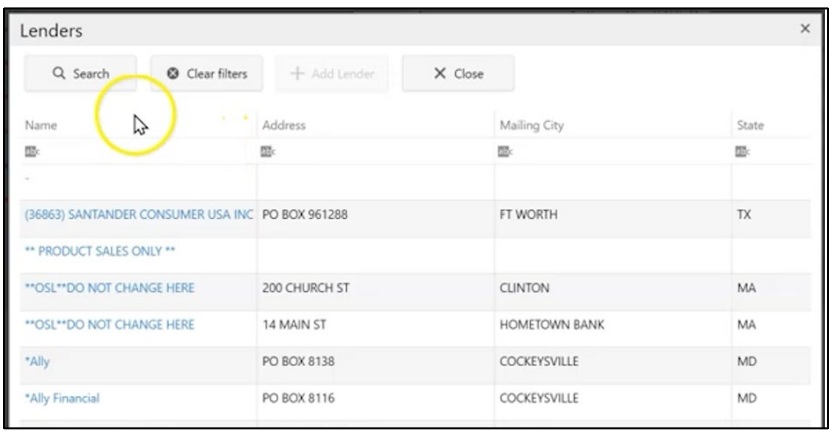
2. Enter the vehicle information. Red asterisks indicate required fields.

After entering the complete VIN, the year, make, and model of the vehicle will auto-populate.

3. Enter all applicable financial information.

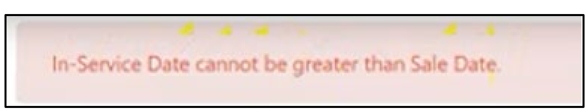


IMPORTANT: If the vehicle has been financed, enter the name of the lender. Click the magnifying glass in the “Lender Search” field to open the search tool. Here, you can locate the lender via name and address. Select the correct lender and the search tool will close.

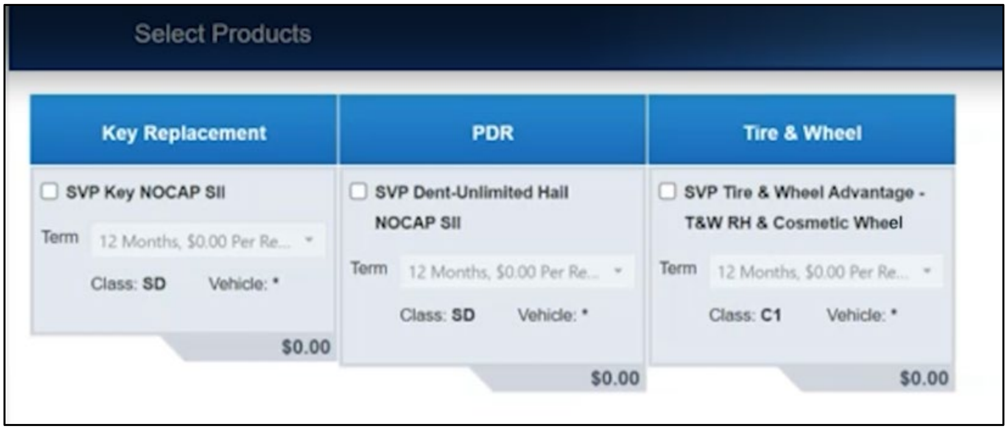


4. Confirm the information has been entered correctly, then click the “Next” button.

If necessary, the system identifies items that need to be addressed before moving forward.



5. All products and coverages that the vehicle is qualified for are displayed after clicking “Next.”

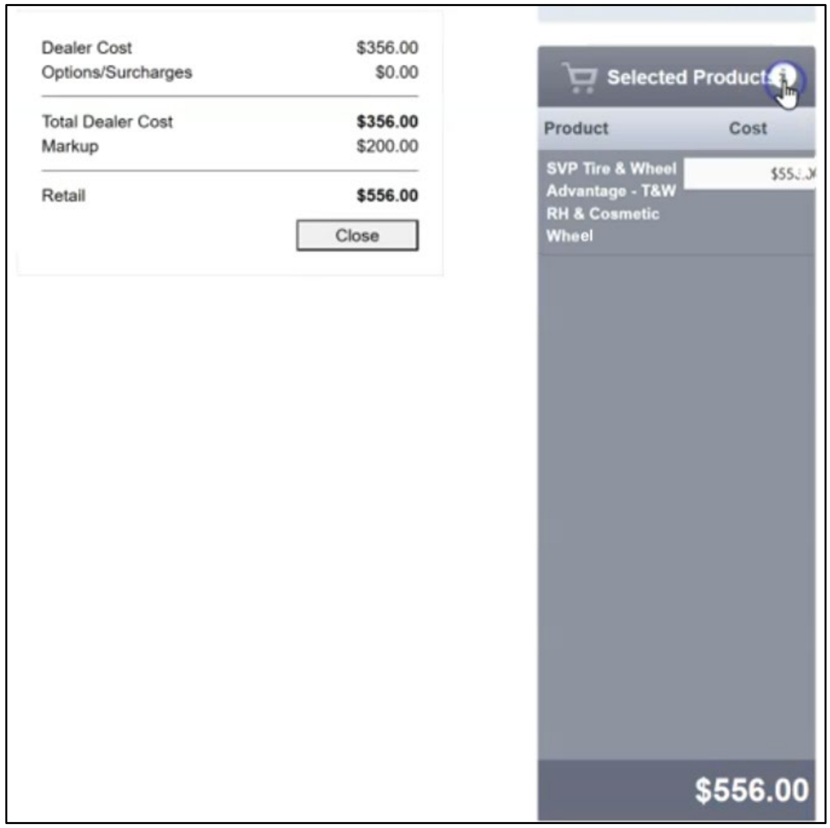


NOTE: If no products are displayed, this may indicate the vehicle is ineligible.

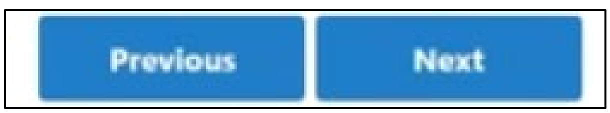
6. Click the checkbox next to the desired product(s) and use the dropdown menu to select the desired term length.

7. The dealer cost for the selected product(s) will then be shown on the screen. To add markup to the dealer cost, change the cost listed in the product's textbox.

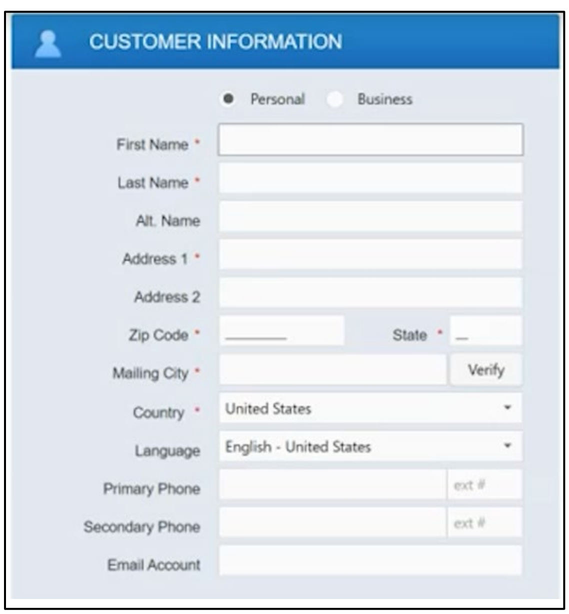
   Click the "i" icon in the top right of the pricing box to view the product price summary showing the cost breakdown, including the dealer cost and markup for the selected product(s).



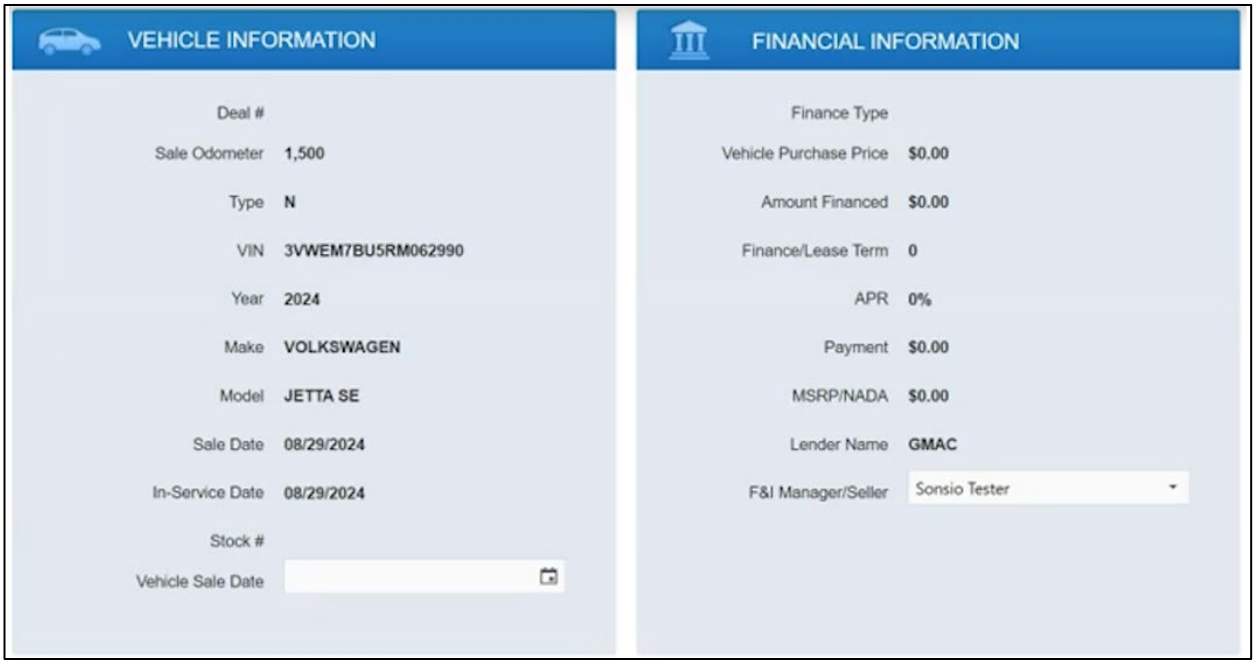
8. Once the product pricing has been finalized, click the "Next" button.



9. Enter the customer information. Red asterisks indicate required fields.



10. Enter the vehicle sale date in the Vehicle Information section, and then confirm that the correct F&I Manager/Seller is listed in the Financial Information Section.



11. If needed, you can edit the Retail Price by changing the cost listed in the product's textbox. **REMINDER:** Leave the contract number blank, it will automatically be generated later.

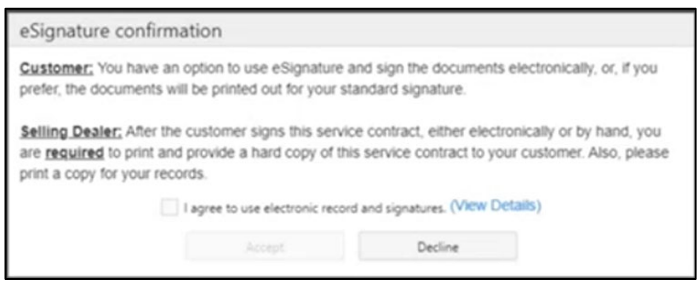
12. Click the "Print preview" button to see a copy of the contract prior to submission. A PDF will open in a new tab. Carefully review all the information listed on the preview of the contract to make sure everything has been submitted correctly. **Once the contract has been submitted, changes or corrections cannot be made.**

After reviewing the contract, close the tab to return to the "Add Contract" screen. If any changes are needed, click the "Previous" button and address to make them. Then, return to this screen and preview the contract again before moving forward.

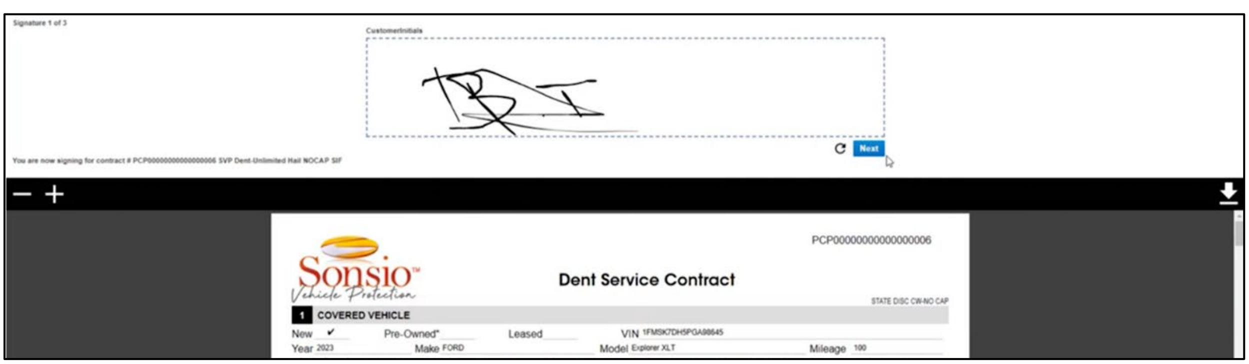
If no changes need to be made, click "Finish" to submit the contract.

13. The contract has been successfully added and the contract number has been created and is displayed on the screen. The status for the contract will be "Pending" until you have remitted for this payment.

14. If eSignatures functionality is enabled, a popup will appear explaining that the customer has the option to either electronically sign the contract or physically sign a printed copy of the contract. **NOTE:** Whether the customer signs the contract electronically or by hand, you must print a hard copy of the completed contract for the customer to keep. Also, please print a copy for your records.



15. To have the customer sign electronically, check the "I agree" box and click Accept. This will open a new window. In the box at the top of the screen, have the customer sign their initials. Then click "Next" and have them sign their full signature. If applicable, click "Next" and have the co-buyer enter their signature. Once all necessary signature have been entered, click "Done."



16. The electronic signatures will now be shown in the contract.

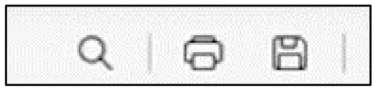

By my signature below, I hereby acknowledge receipt of this Registration Form, the Contract Terms and Conditions, and the State Changes and Disclosures Addendum, and that I have been given the opportunity to read this Contract in its entirety.

5 SIGNATURES

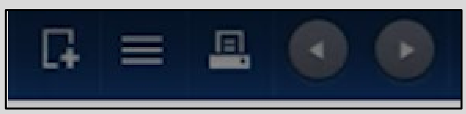
09/18/2024			09/18/2024
Contract Holder Signature	Purchase Date	Co-Buyer Signature	Purchase Date

CONTRACT PROVIDER/OBLIGOR/ADMINISTRATOR: Sonsio International, Inc., P.O. Box 16462, Golden, CO 80402, is the Provider, Obligor, and Administrator. **In Massachusetts the seller identified in Section 2 above on this Contract is the Provider and Obligor** and Sonsio

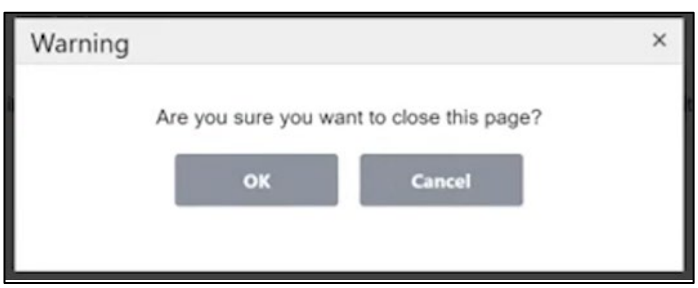
17. To print a copy of the finalized contract for the customer and for your records, click the print button in the upper right.



The popup will only occur if eSignature functionality is enabled for your dealership. If the popup does not occur, or the customer would prefer to sign by hand, click the print icon in the upper right corner to open a printable copy of the finalized contract for the customer to sign. (If the customer is electing to sign by hand, click “Decline” on the popup.) **NOTE:** Remember to make a copy of the signed contract for your records.



18. You can click the “New Contract” button to start adding another contract into the system, or the “Close” button to return to the home screen, and then click “OK” to confirm that you wish to return to the home screen.

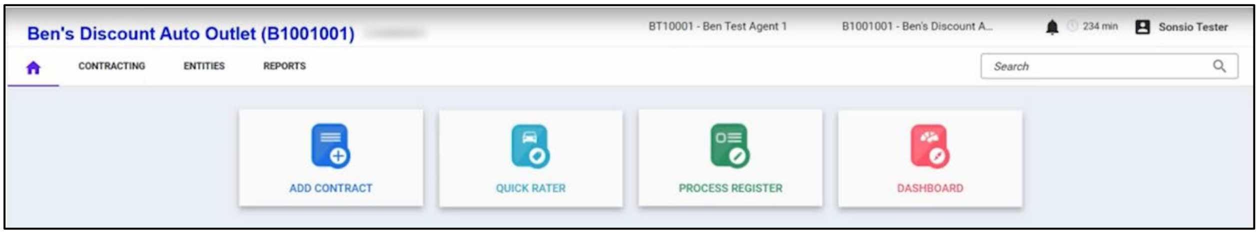


Remitting Payments in PCRS+

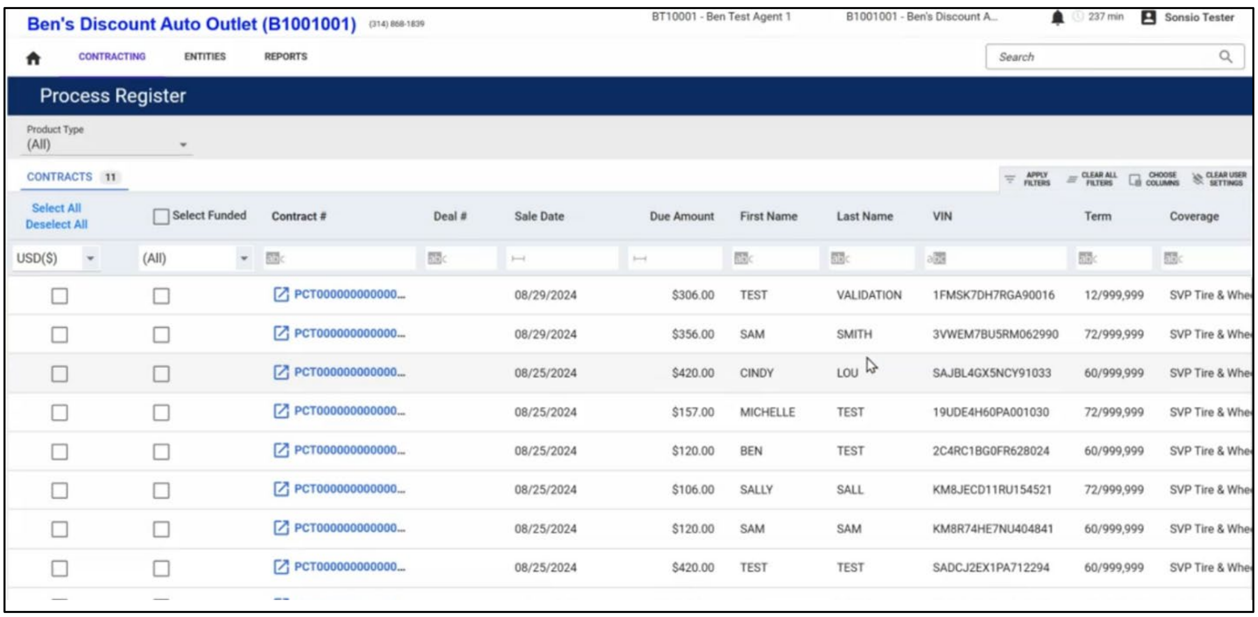
For more detailed visual guidance on remitting payments using Process Register, please see the videos found at: https://www.sonsio.com/training/pcrs

The Process Register function allows you to remit payments in PCRS+.

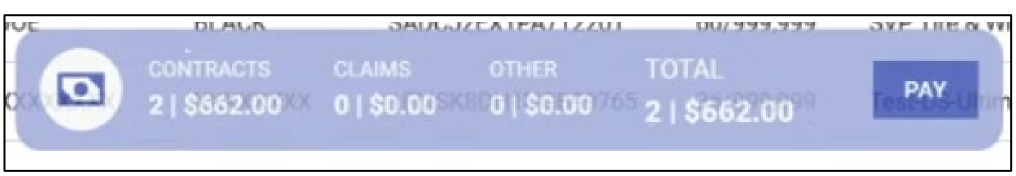
1. Click the "PROCESS REGISTER" button on the PCRS+ home screen.



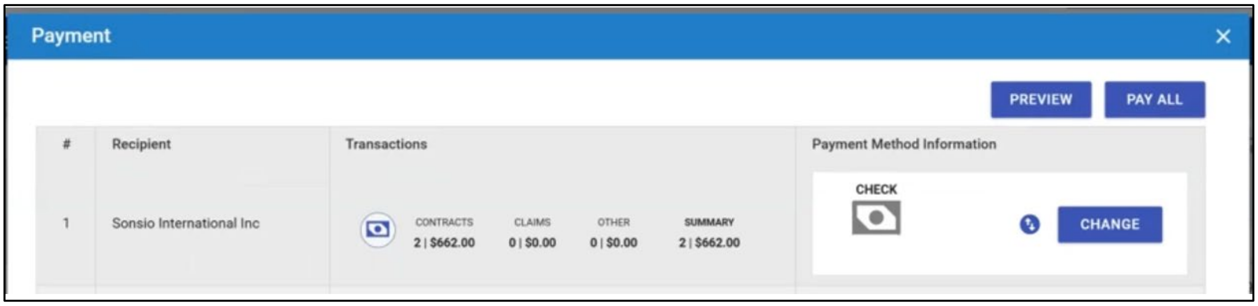
2. Any unpaid contracts will be listed here on the Process Register page. You can use the buttons on the top left to select or deselect all contracts. Or you can use the checkboxes to select specific contracts.



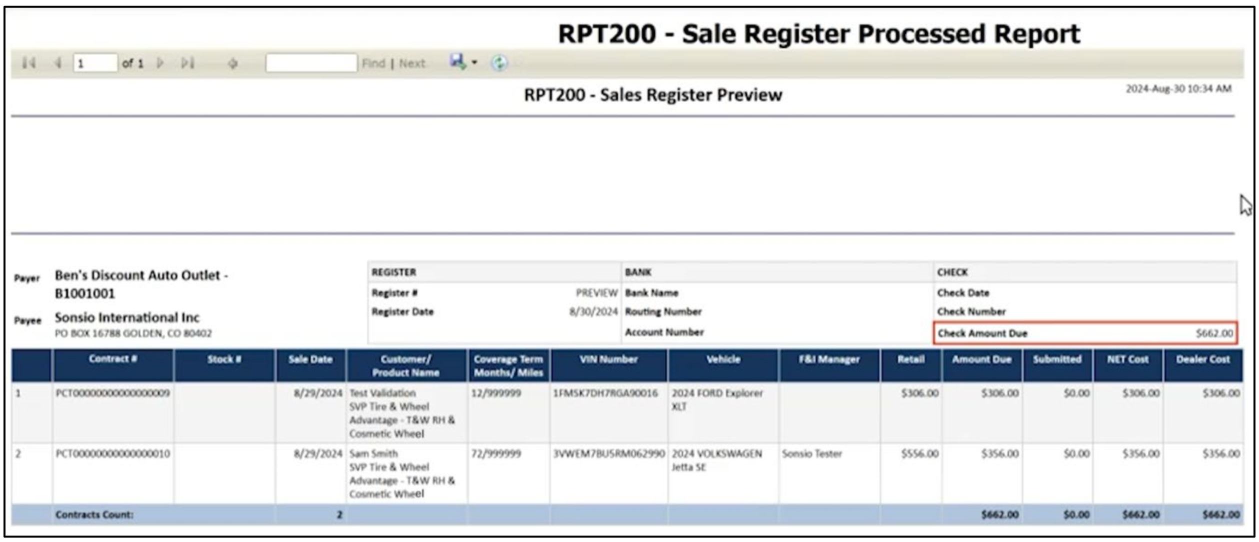
3. After you have selected the contract(s) you wish to remit payment for, the contracts total, claims total, other total, and overall total amounts will be displayed in the bottom right corner. Select "PAY" to pay the amount listed under "TOTAL."



4. Review the payment details in the payment box that pops up.



You can also click "PREVIEW" to open a "Sale Register Processed Report" in a new tab with more detailed information; including information about the contracts, customers, products, check, and payee. Close the tab to continue the remittance process.



RPT200 - Sale Register Processed Report

RPT200 - Sales Register Preview

2024-Aug-30 10:34 AM

Payer: Ben's Discount Auto Outlet - B1001001

Payee: Sonsio International Inc
PO BOX 16788 GOLDEN, CO 80402

REGISTER		BANK	CHECK	
Register #	PREVIEW	Bank Name	Check Date	
Register Date	8/30/2024	Routing Number	Check Number	
		Account Number	Check Amount Due	$662.00

	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	PCT0000000000000009		8/29/2024	Test Validation SVP Tire & Wheel Advantage - T&W RH & Cosmetic Wheel	12/999999	1FMSK7DH7RGA90016	2024 FORD Explorer XLT		$306.00	$306.00	$0.00	$306.00	$306.00
2	PCT0000000000000010		8/29/2024	Sam Smith SVP Tire & Wheel Advantage - T&W RH & Cosmetic Wheel	72/999999	3VWEM7BU5RM062990	2024 VOLKSWAGEN Jetta SE	Sonsio Tester	$556.00	$356.00	$0.00	$356.00	$356.00
	Contracts Count:		2							$662.00	$0.00	$662.00	$662.00

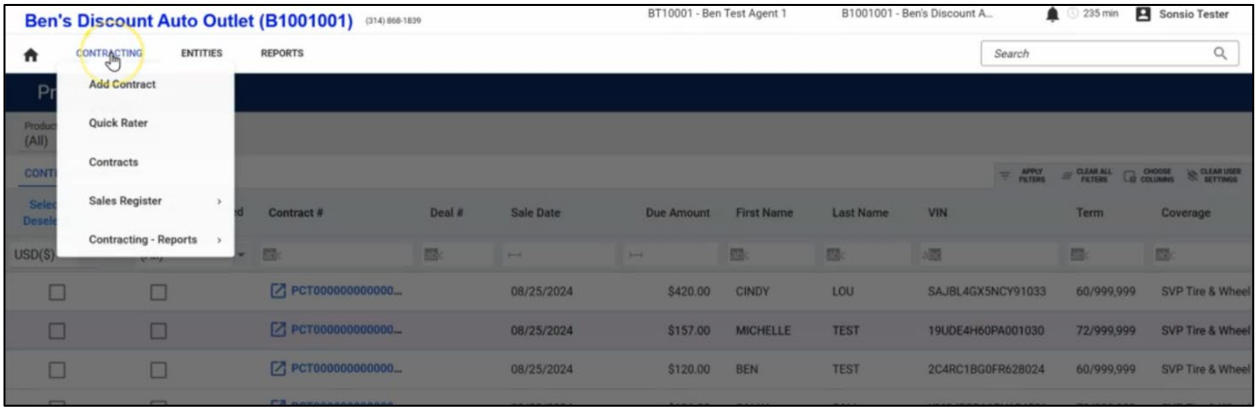
5. After reviewing the payment details, to proceed with the payment, click "PAY ALL."

6. The same "Sale Register Processed Report" will open in a new tab, but now the contracts shown in the report have been marked as paid in the system.

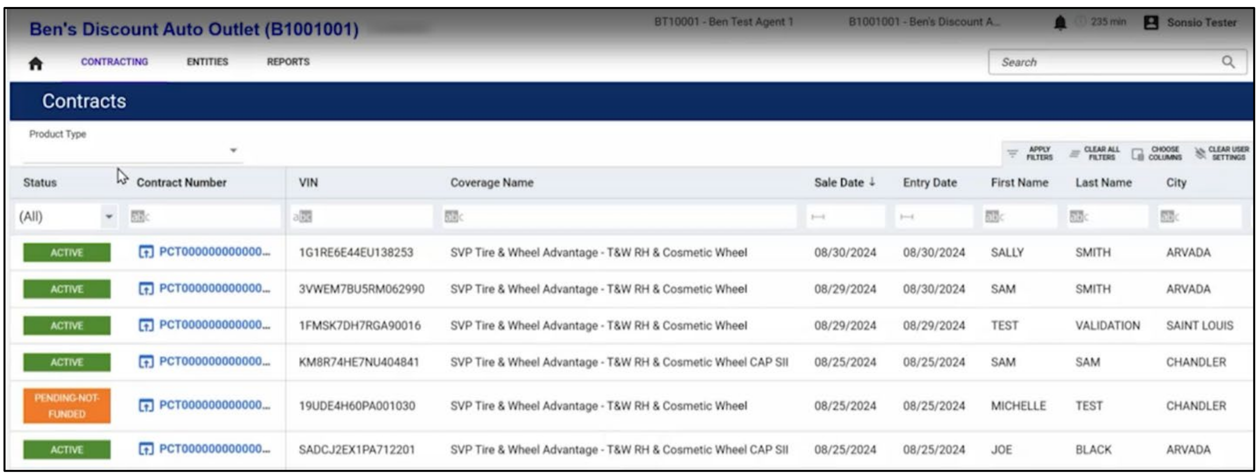
7. Print a copy of the report, and mail that along with your check to the payee on the report.

8. Close the browser tab with the report to return to the Process Register. The contracts you have paid will no longer be listed on the Process Register.

9. To view paid contracts, cover over “CONTRACTING” in the top left and click “CONTRACTS.”



10. The contracts you have already paid for will have a green “ACTIVE” status, while any unpaid contracts will show a “PENDING-NOT-FUNDED” status.

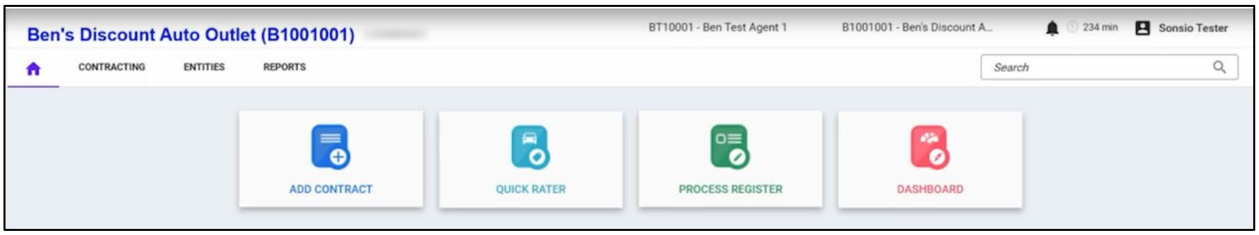


Using Quick Rater in PCRS+

For more detailed visual guidance on using Quick Rater, please see the videos found at: https://www.sonsio.com/training/pcrs

The Quick Rater function allows you to view all eligible products and electronically rate a contract. This process is different from the Add Contract function because it allows you to see the available products based on the specific VIN and Mileage without creating a contract. **NOTE:** If you want to create a contract, please instead follow the instructions for Adding Contracts in PCRS+.

1. Click the “QUICK RATER” button on the PCRS+ home screen.

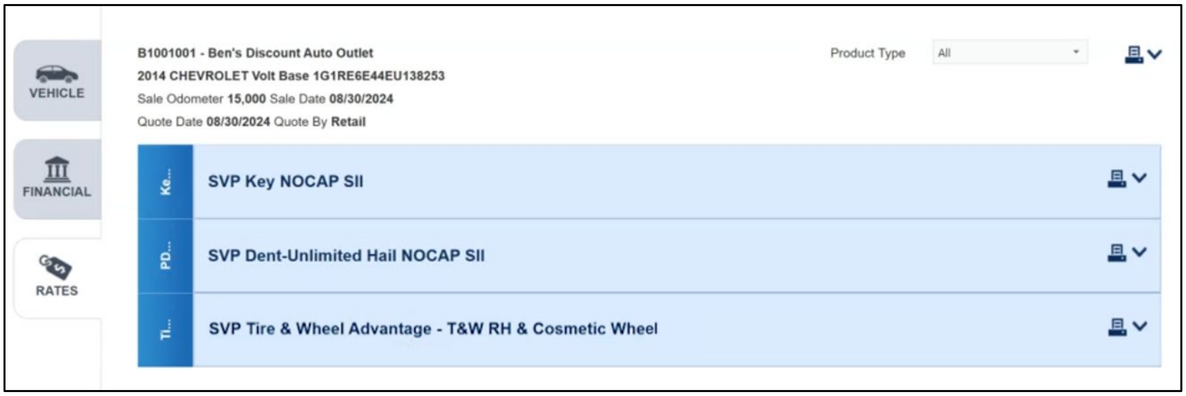


This will take you to a screen where you can start entering the vehicle information.

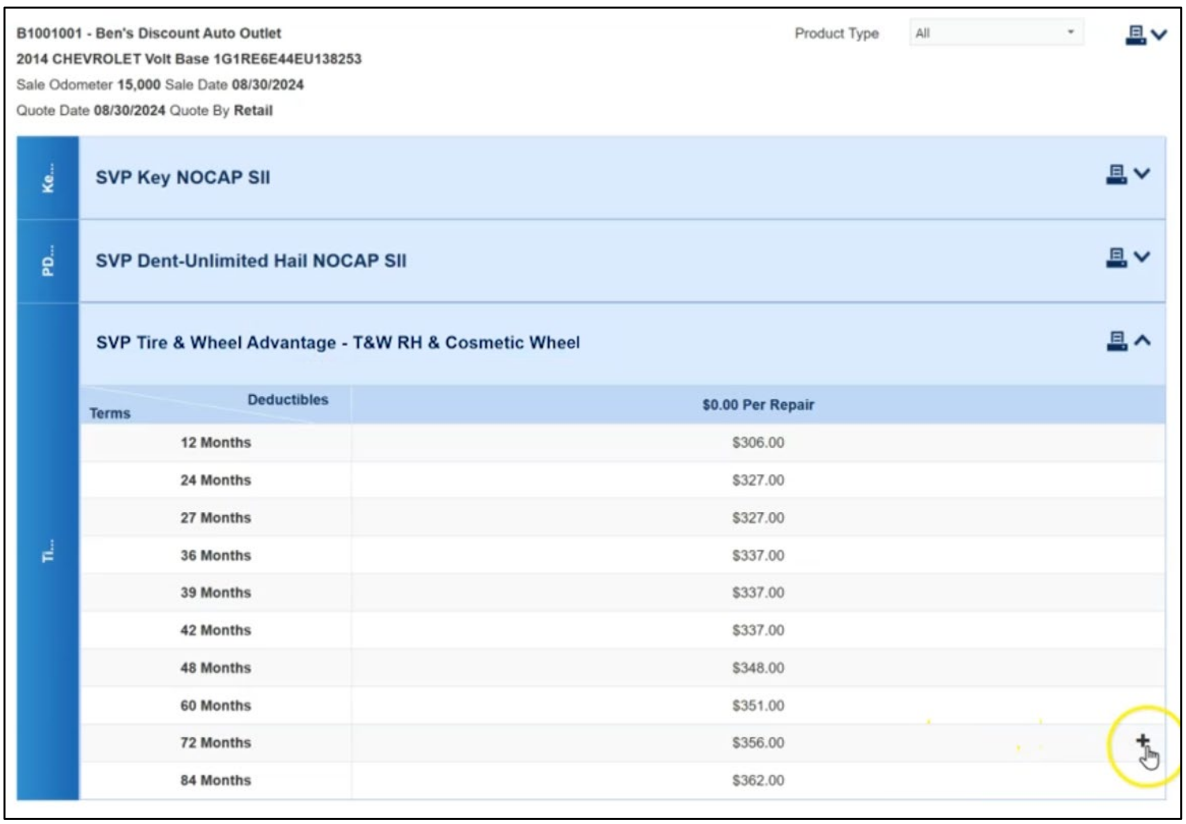
2. Enter the vehicle information. Red asterisks indicate required fields.

After entering the complete VIN, the year, make, and model of the vehicle will auto-populate.

3. After entering the vehicle information, you can click "Show Rates" in the bottom right, or you can click on the "RATES" tab on the left. This tab will display all the options this vehicle is eligible for and that your dealership is signed up to sell. **NOTE:** If no products appear, this may indicate that the vehicle is ineligible.

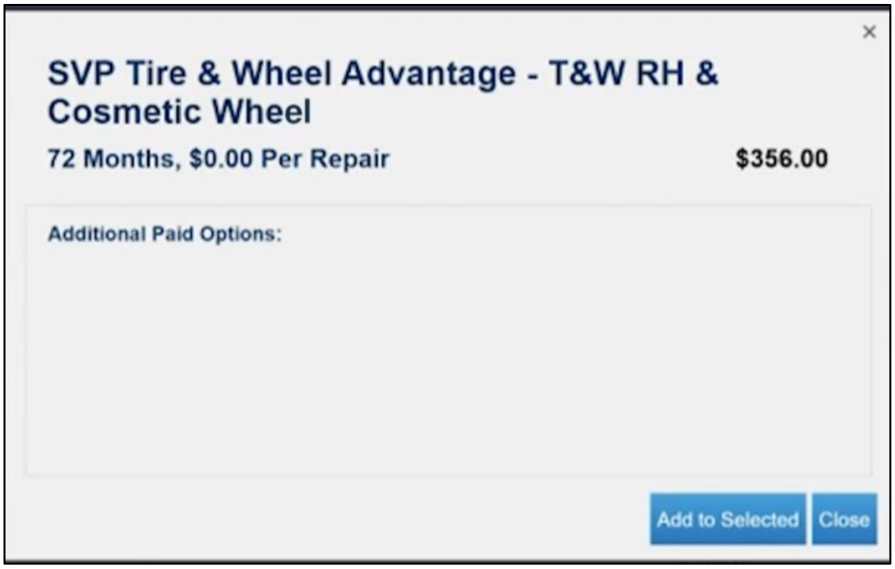


4. You can click the dropdown next to any of the product options to see all term length options as well as the rate associated with each term length.



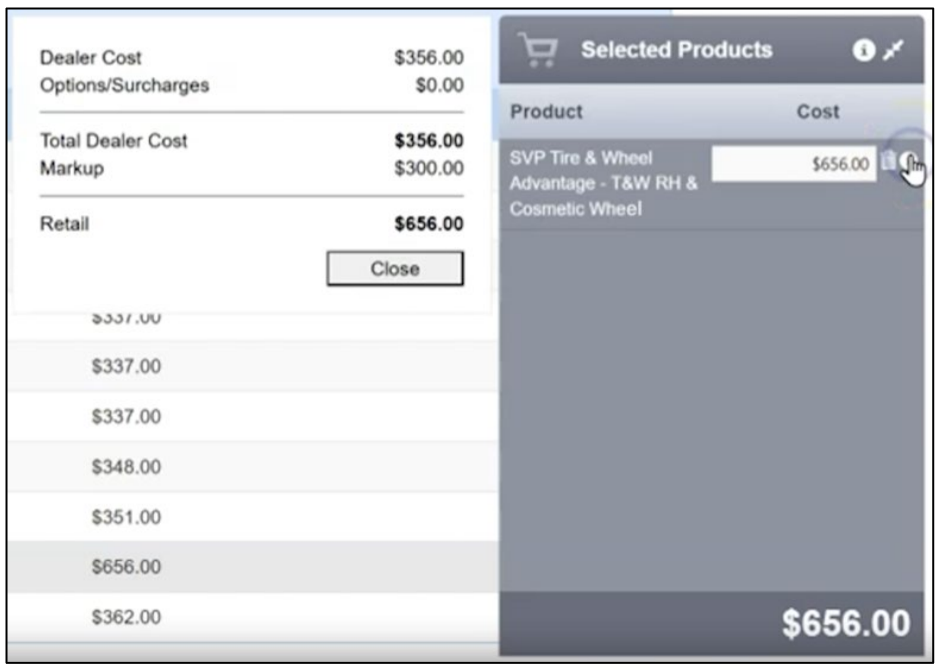
Hover over the term length you would like to select and click the plus icon.

A pop-up with your selection will appear. Click “Add to Selected” to continue with your selection.



5. The dealer cost for the selected product(s) will then be shown on the screen. To add markup to the dealer cost, change the cost listed in the product’s textbox.

   Click the “i” icon in the top right of the pricing box to view the product price summary showing the cost breakdown, including the dealer cost and markup for the selected product(s).



   You can use steps 4 and 5 to view other the products available for this vehicle and customize rates.

After reviewing the product options, if you would like to create a contract for this vehicle, return to the home screen and follow the steps in the “Adding Contracts in PCRS+” Section.