

Generating Reports in PCRS+

For more detailed guidance and videos on the entire PCRS+ system, please see the videos and full user guide found at: <https://www.sonsio.com/training/pcrs>

Accounts that have Agent Level Access or Single Dealer Level Access, can generate two types of reports in PCRS+:

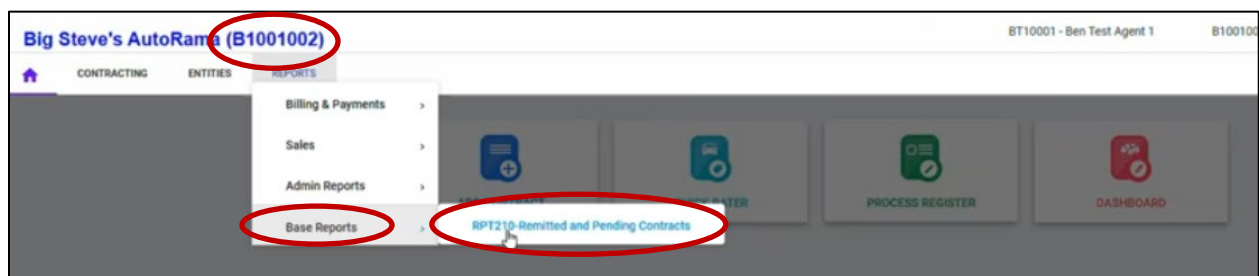
- [REPORT GUIDE: RPT210 – Remitted and Pending Contracts](#)
 - RPT210 gives contract-level details on all pending and remitted contracts. It shows how long each contract has been pending.
 - For instructions on how to generate a RPT210 report go to [page 2](#).
- [REPORT GUIDE: RPT939 – Aging Balance Details](#)
 - RPT939 shows outstanding balances owed by dealers for Active contracts, broken into aging buckets (31–60 days, 61–90 days, 90+ days), with contract-level detail available on the details tab.
 - For instructions on how to generate a RPT939 report go to [page 5](#).

RPT210-Remitted and Pending Contracts

RPT210 gives contract-level details on all pending and remitted contracts. It shows how long each contract has been pending

What You Will See:

- All pending contracts (Agent-Level accounts will see them listed by dealer)
 - Number of days each contract has been pending
 - Product breakdown for each contract (e.g., Tire & Wheel, PDR, Key)
 - Contract level detail (via the Details tab)
1. On the PCRS+ home screen, hover over “Reports” in the upper left area of the screen. In the menu that appears, hover over “Base Reports” then click on “RPT210-Remitted and Pending Contracts.”



2. The RPT210-Remitted and Pending Contracts page will appear along with a page of options to narrow down the report results. Agent Level accounts will see all of the dropdowns below. Dealer Level accounts will not see Dealer Group Type, Dealer Group, or Dealer dropdowns.

A screenshot of the 'RPT210 - Remitted and Pending Contracts' report form. It features several dropdown menus for filtering: Country (United States), State (ALL), Product Type (ALL), Report Group (ALL), Dealer Group Type (ALL), Dealer Group (ALL), Dealer (ALL), and Reporting Month (<Select a Value>). There are also buttons for 'View Report' and 'Export CSV'. The 'Details' dropdown is set to 'Grand Summary'.

For best results it is recommended to leave the top six dropdowns set to their default value (“ALL”) otherwise it may leave out results that you do not wish to have omitted. (For Dealer Level accounts this advice is just for the top four dropdowns).

Agent Level accounts can use the “Dealer” dropdown to select which dealerships they would like to have included in the report or leave it set to “ALL” to have all dealers assigned to their account included in the report. To select dealers, click the dropdown arrow to expand the menu, then check the box next to the dealerships you would like to include. Use the right scroll bars to see all dealers assigned to your account.

RPT210 - Remitted and Pending Contracts

Country: State: View Report
 Product Type: Report Group: Export CSV
 Dealer Group Type: Dealer Group:
 Dealer: Details:
 Reporting Month:

2026 - SIW - 2026SIW
☐ Ben's Discount Auto Outlet - B
☒ Big Steve's Autolama - B1001
☐ Devil Deal Discount Autos - B1
☒ Florida Auto Wholesales - TES
☐ Frosty Frynks Super Motor TES
☐ LUCID TEST DEALER - LUC000

- For all account types, the “Details” dropdown defaults to “Grand Summary.” To see as much detail as possible it is recommended to select all options under this dropdown. To do so, click the dropdown arrow to expand the menu, then check the box next to “(Select All)”

RPT210 - Remitted and Pending Contracts

Country: State: View Report
 Product Type: Report Group: Export CSV
 Dealer Group Type: Dealer Group:
 Dealer: Details:
 Reporting Month:

(Select All)
 Grand Summary
 Dealer Details
 Contract Details

- Select a month from the “Reporting Month” dropdown menu. It is recommended to choose the current month.

Country:
 Product Type:
 Dealer Group Type:
 Dealer:
 Reporting Month:

2026-Apr
 2026-Mar
 2026-Feb
 2026-Jan
 2025-Dec

- Once the parameters are set as preferred, click “View Report.” The report will generate below with the information requested in the dropdown menus. Or, click “Export CSV” to download a separate spreadsheet file with the report.

Country: State:
Product Type: Report Group:
Dealer Group Type: Dealer Group:
Dealer: Details:
Reporting Month:

Find | Next

RPT210 - Remitted and Pending Contracts 2026-Apr-07 03:10 PM

Navigate To: [Summary](#) [Dealer Level Details](#) [Contract Level Details](#)

Dealer Level Details

Dealer Number	Dealer Name	MANAGEMENT_COMPANY	Product Type	Total Count	Remitted Count	Pending Count	Pending Since	% Pending	Gross \$ Remitted	Cancelled \$	Net \$ Remitted	Net Rate	\$ Pending
			PDR - PDR	11	0	11	9/6/2024	100.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$3,579.00
			PDR - PDR	1	0	1	10/5/2024	100.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$416.00
			PDR - PDR	2	0	2	3/31/2026	100.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$1,299.00
			PDR - PDR	3	0	3	10/5/2024	100.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$1,856.00
			PDR - PDR	2	0	2	12/14/2024	100.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$668.00
			PDR - PDR	1	0	1	4/3/2026	100.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$748.00
			PDR - PDR	1	0	1	3/14/2025	100.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$416.00

Dealer Level accounts will not have the first three columns pictured here.

Use the “Contract Level Details” to drill down further into each report result.

- To export the report, click on the blue save icon with a green plus to open a menu of format options. The recommended export format is PDF. Click a file type and the report will be downloaded in that format.

RPT210 - Remitted and Pending Contracts

Country: State:
Product Type: Report Group:
Dealer Group Type: Dealer Group:
Dealer: Details:
Reporting Month:

Find | Next

Navigate To: [Summary](#) [Dealer Level Details](#) [Contract Level Details](#)

Contract Level Details

Dealer Number	Dealer Name	Billing Address	Phone	Product Type	Days Pending	Contract #	VIN

Word
Excel
PowerPoint
PDF
TIF file
MHTML (web archive)
CSV (comma delimited)
XML file with report data
Data Feed

Page 3 of 3

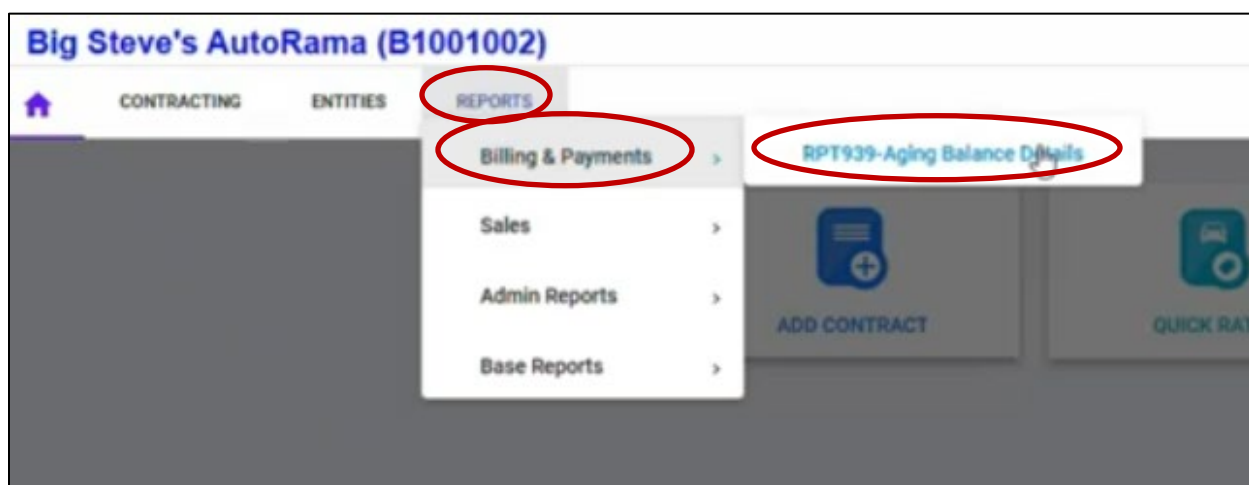
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RPT939-Aging Balance Details

RPT939 shows outstanding balances owed by dealers for Active contracts, broken into aging buckets (31–60 days, 61–90 days, 90+ days), with contract-level detail available on the details tab.

What You Will See:

- Balances organized by aging bucket
 - Agent Level accounts – data will be listed by dealer and include all dealers tied to your account login
 - Contract level detail (via the Details tab)
1. On the PCRS+ home screen, hover over “Reports” in the upper left area of the screen. In the menu that appears, hover over “Billing & Payments” then click on “RPT939-Aging Balance Details.”

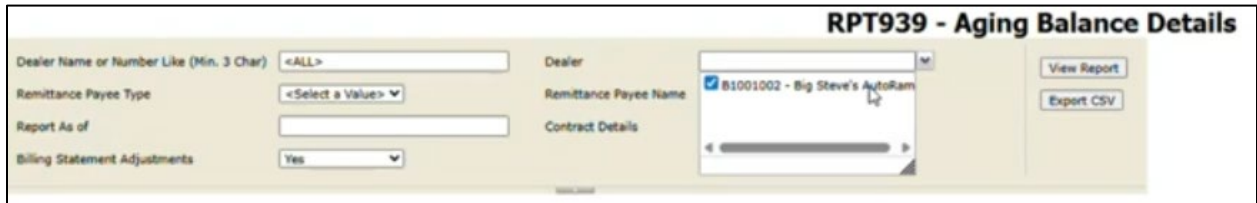


2. The RPT939-Aging Balance Details page will appear along with a page of options to narrow down the report results. Agent Level accounts will see all of the dropdowns below. Dealer Level accounts will not see Dealer Group Type, or Dealer Group dropdowns.

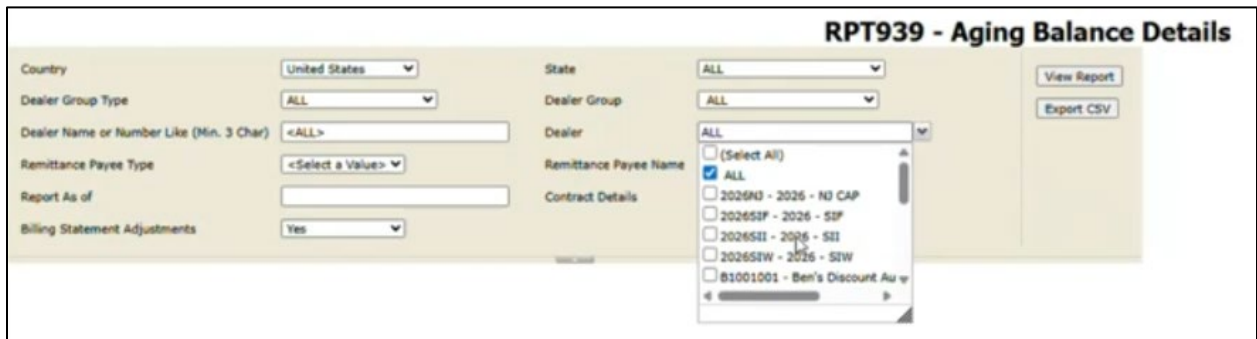
A screenshot of the 'RPT939 - Aging Balance Details' page. It features a form with various filters: Country (United States), State (ALL), Dealer Group Type (ALL), Dealer Group (ALL), Dealer Name or Number Like (Min. 3 Char) (<ALL>), Dealer (ALL), Remittance Payee Type (<Select a Value>), Remittance Payee Name, Report As of, Billing Statement Adjustments (Yes), and Contract Details (Yes). There are 'View Report' and 'Export CSV' buttons on the right. The page title 'RPT939 - Aging Balance Details' is at the top right.

For best results it is recommended to leave all dropdowns as their default values, except for the ones called out in the instructions below.

3. Dealer Level accounts should select their dealer from the “Dealer” dropdown (it will be the only option available). Click the dropdown arrow to expand the menu, then check the box next to your dealership.

The screenshot shows the 'RPT939 - Aging Balance Details' form. The 'Dealer' dropdown menu is expanded, showing a list of dealers. The first option, 'B1001002 - Big Steve's AutoRam', is selected with a checked box. Other options are visible but not selected. The form also includes fields for 'Dealer Name or Number Like (Min. 3 Char)', 'Remittance Payee Type', 'Report As of', 'Billing Statement Adjustments', 'Remittance Payee Name', and 'Contract Details'. There are 'View Report' and 'Export CSV' buttons on the right.

Agent Level accounts can use the “Dealer” dropdown to select which dealerships they would like to have included in the report or leave it set to “ALL” to have all dealers assigned to their account included in the report. To select dealers, click the dropdown arrow to expand the menu, then check the box next to the dealerships you would like to include. Use the right scroll bars to see all dealers assigned to your account.

The screenshot shows the 'RPT939 - Aging Balance Details' form. The 'Dealer' dropdown menu is expanded, showing a list of dealers. The first option, 'ALL', is selected with a checked box. Other options include '2026N3 - 2026 - NO CAP', '2026S3F - 2026 - S3F', '2026S4I - 2026 - S4I', '2026S3W - 2026 - S3W', and 'B1001001 - Ben's Discount Au v'. The form also includes fields for 'Country', 'State', 'Dealer Group Type', 'Dealer Group', 'Dealer Name or Number Like (Min. 3 Char)', 'Remittance Payee Type', 'Report As of', 'Billing Statement Adjustments', 'Remittance Payee Name', and 'Contract Details'. There are 'View Report' and 'Export CSV' buttons on the right.

4. Enter the date you would prefer into the “Report As Of” field in MM/DD/YYYY format. The recommendation is to use the current date in this field.
5. Once the parameters are set as preferred, click “View Report.” The report will generate below with the information requested in the dropdown menus. Or, click “Export CSV” to download a separate spreadsheet file with the report.

Use the arrows directly under the area where the parameters were set to view the different tabs. Each tab has a different type of details to view.

RPT939 - Aging Balance Details

Country: United States State: ALL
 Dealer Group Type: ALL Dealer Group: ALL
 Dealer Name or Number Like (Min. 3 Char): <ALL> Dealer: ALL
 Remittance Payee Type: ALL Remittance Payee Name: ALL
 Report As of: 04/07/2026 Contract Details: Yes
 Billing Statement Adjustments: Yes

1 of 5

RPT939 - Aging Balance Details 2025-Apr-07 02:48 PM

Country:	United States	Remittance Payee Type:	ALL	Remittance Payee Name:	ALL
State:	ALL	Dealer:	ALL	Report As of:	04/07/2026
Dealer Group Type:	ALL	Contract Details:	Yes	Billing Statement Adjustments:	Yes
Agent:	Ben Test Agent 1				

Summary By Dealer						
Dealer Number	Dealer Name	Current	15-60 Days	61-90 Days	Over 90 Days	Total Due
Contract Balance						\$0.00
Cancellation Statement Credits						\$0.00
Outstanding Payments						\$0.00
Billing Statement Adjustments Total						\$0.00
Grand Total		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Percent		0%	0%	0%	0%	0%

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- To view all details together, export the report by clicking on the blue save icon with a green plus to open a menu of format options. The recommended export format is PDF. Click a file type and the report will be downloaded in that format.

RPT939 - Aging Balance

Country: United States State: ALL
 Dealer Group Type: ALL Dealer Group: ALL
 Dealer Name or Number Like (Min. 3 Char): <ALL> Dealer: ALL
 Remittance Payee Type: ALL Remittance Payee Name: ALL
 Report As of: 04/07/2026 Contract Details: Yes
 Billing Statement Adjustments: Yes

4 of 5

RPT939 - Aging Balance Details

Dealer Number	Dealer Name	Remittance Payee Type	Remittance Payee Name	Contract Applied Amount	Transaction Type	Payment Date	Payment Type	Unapplied
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Page 4 of 5 Powered by PCMI Corporation