Integrated eContracting Setup: **Planning**

Essential Information Needed Prior to a Software System Setup

A Dealer should have the information below ready BEFORE calling their Software System to setup products. Taking a little time to prepare will result in a smoother setup process.

CONTACT INFORMATION

Have the name, email, and phone number ready for the:

- Dealership
- Authorized User at the Dealership
- Dealer's Agent

PROVIDER PREREQUISITES

A Provider *may* have requirements Dealer's must complete before they can eRate & eContract products.

For example:

- Enrollment with the Provider's Products
- A signed Dealer agreement on file

PRODUCT PRICING

Products & pricing should be configured in the Software System as they are in the Provider's System (Portal). If setup differently, the Dealer could receive inaccurate rates.

To ensure pricing is setup correctly in the Dealer's Software System:

- Print a screen shot of the Provider's Portal for all products to be setup
- If setting up a Dealer Group, attach as many screen shots as needed

Fill out the table below for all products to be setup in the Software System

PRODUCT NAME	DEALER ID	RETAIL MARKUP = COST + (% / $ VALUE / FIXED AMOUNT)

SOFTWARE SYSTEM SETUP

To setup products, a Dealer's Authorized User should:

- complete the information above & have it handy
- have their Provider Portal product setup print outs ready
- contact their Software System's Support; for a list of System Support information, **click here**
- ask for help "*setting up products for eContracting*" when calling the Software System

Integrated eContracting Setup: **Post Setup**

Dealer & Agent Action Items

By providing good business support, the Agent can ensure a successful software launch for the Dealer. This includes verifying all F&I Managers are trained and using the System properly.

SYSTEM TRAINING

Dealers should make sure all current & new F&I Team Members participate in software training to learn how to:

- eRate & eContract products
- void a contract in the System
- get System Support for technical issues, questions and training

To schedule training or request a demo, a Dealer must call their Software System Support. **Click here** for a list of all System Support contact information.

Make sure ALL F&I Team Members run test deals in the System to verify pricing and reinforce training

TALK TO ACCOUNTING

Make sure Accounting understands the new eContracting process and how to correctly void contracts

Review remittance procedures and reconcile every eContract

UTILIZATION FOLLOW-UP

Congrats! Your Dealer made it through the setup process, but there's one more *vital* step: monitoring utilization

- Meet with Accounting at their 1st month's end to fully reconcile eContracts in the Dealer's Software System and the Provider's System
- If the Dealer is not using their Software System to eContract 100% of the time, schedule a Dealer visit to determine the cause(s)

DEALER SUPPORT

SECTION RESERVED FOR:

- **SYSTEM SUPPORT CONTACT INFO**
  LINKS TO ADDT'L SYSTEM RESOURCES, VIDEOS, GUIDES, CHECKLISTS....
- Dealers are 100% supported by their Software System
- A Dealer's first call, every time, for technical support & all System related questions should be directed to the Software System's Support
- If a Dealer calls you with technical questions, direct them to contact their Software System's Support. This best practice is the most efficient way to resolve issues.

AGENT SUPPORT

Visit penrc.com for more information & resource materials

Click below to download:

- **Agent Leadership Guide**
- **eContracting Vital Signs Checklist**

Contact PENSERVICES@OPENDEALEREXCHANGE.COM to learn more about how we can help you, help your Dealers