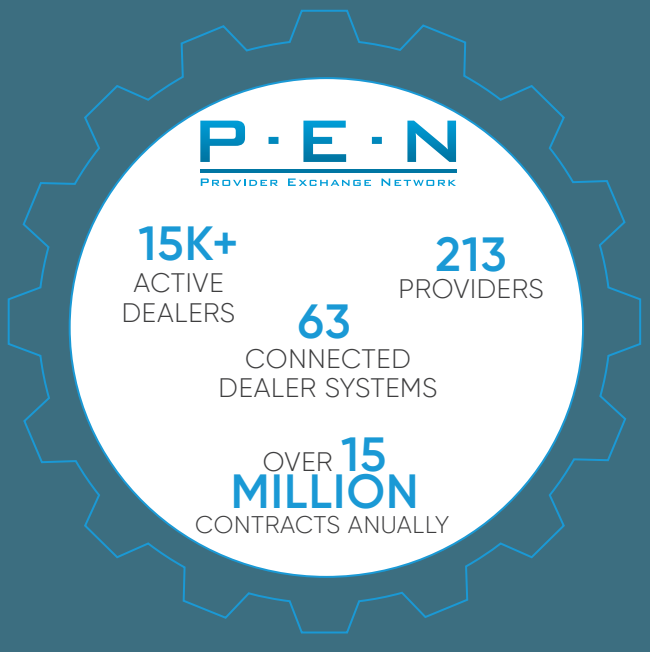
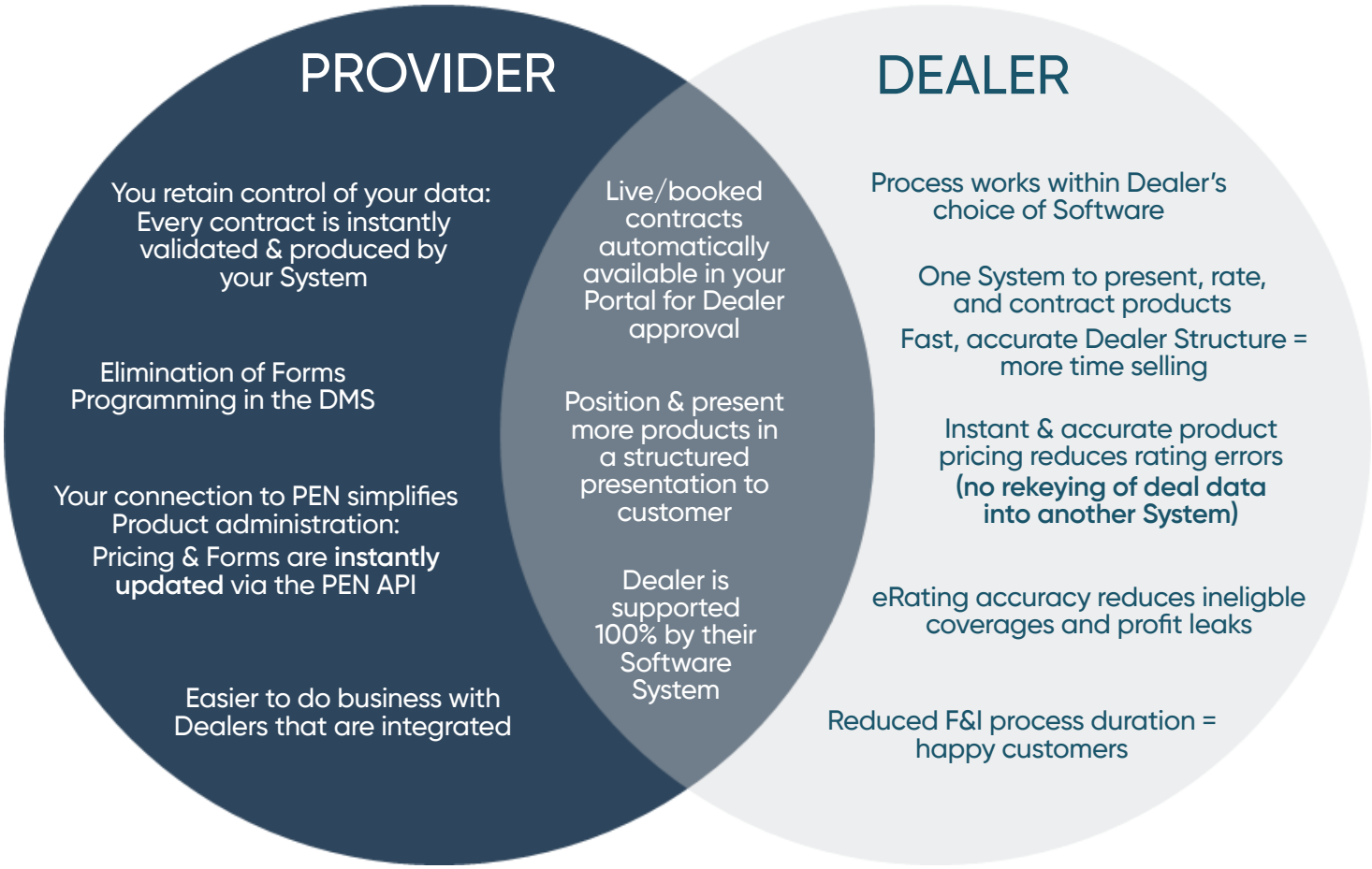
Integrated eContracting is Just eContracting – **But WITH the Benefits of an Integrated Dealership System**

PEN connects your Administrative System and Dealer Portal to a network of Dealer Systems including DMS, F&I Menu, Digital Retailing, and Specialty Software Applications.

The technology enables a streamlined and seamless sales process by integrating the Provider's System with the Dealer's Point of Sale System.



INTEGRATED eCONTRACTING **BENEFITS**



WATCH "Integrated eContracting 101"

DOWNLOAD a 2-page PEN Overview

What is **INTEGRATED eCONTRACTING?**

Integrated eContracting complements your System, Portal, and processes by connecting you to more than 60 Dealer Systems on the PEN.

Only when Dealers are truly integrated can Providers ensure data is validated in real-time. This seamless and streamlined process improves the Dealer and Consumer experience, and greatly reduces rating and contract errors.
A win-win for everyone involved.

INTEGRATED ECONTRACTING
IS WHERE THE DEALER'S SOFTWARE SYSTEM EXCHANGES DATA AND FORMS, IN REAL-TIME, WITH THE PROVIDER'S SYSTEM.

THE DEALER'S MENU IS THE ONLY SOFTWARE USED FOR CONTRACTING AT THE POINT OF SALE.

Integrated eContracting **FUNCTIONS**

eRATING

Dealers use their Menu to receive accurate, real-time product eligibility and pricing from your System directly into their software.

Pricing is automatically calculated without rekeying deal data.

eCONTRACTING

Integrated eContracting doesn't replace your System- it complements it by allowing Dealers to eContract directly in their current software.

Correct forms are sent by your System to the Dealer's System, in real-time, at the point of sale.

APPROVAL

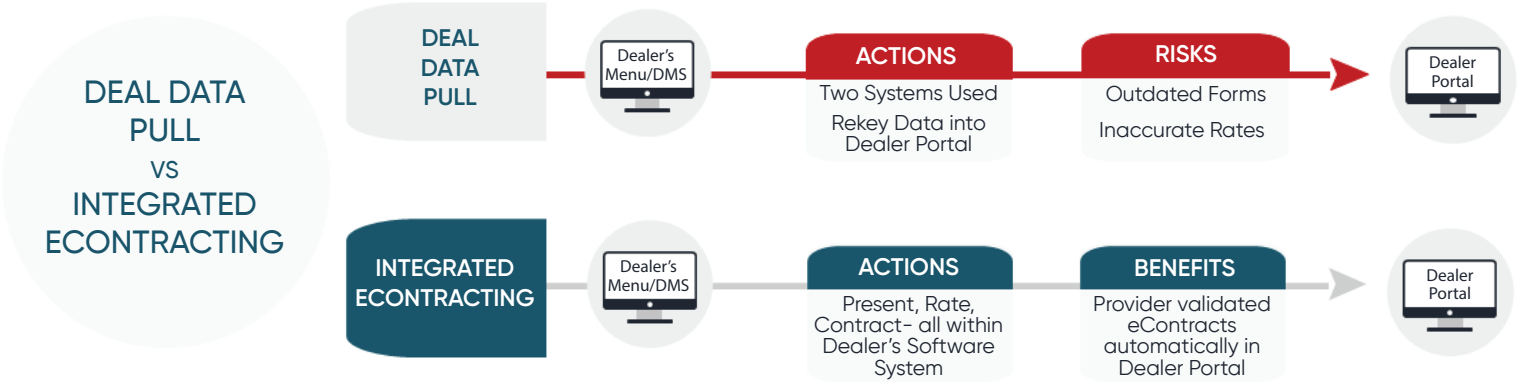
Live or booked contracts are automatically registered in your Portal for Dealer approval.

There are no changes to your remittance procedures.

A contract voided in the Dealer's System also updates the Dealer Portal.

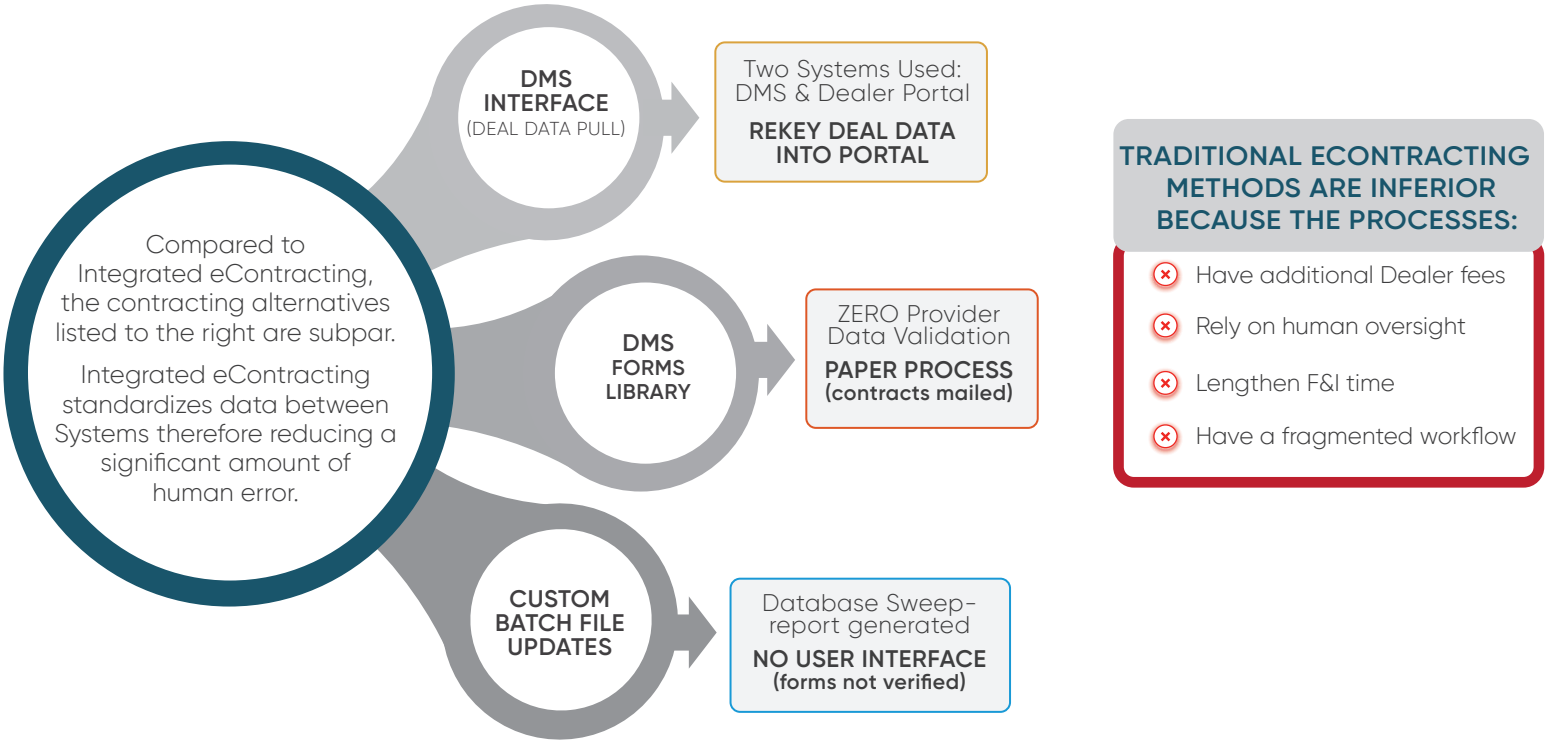
TRUE INTEGRATION
more than just saving key strokes

Dealers want to use their primary Selling System to rate and contract and don't want to pay for deal data pull or to update forms. With Integrated eContracting they don't have to. Dealers use their System of choice to get instant and accurate rates and validated forms directly from your System.



Integrated eContracting is the only **TRUE INTEGRATION**

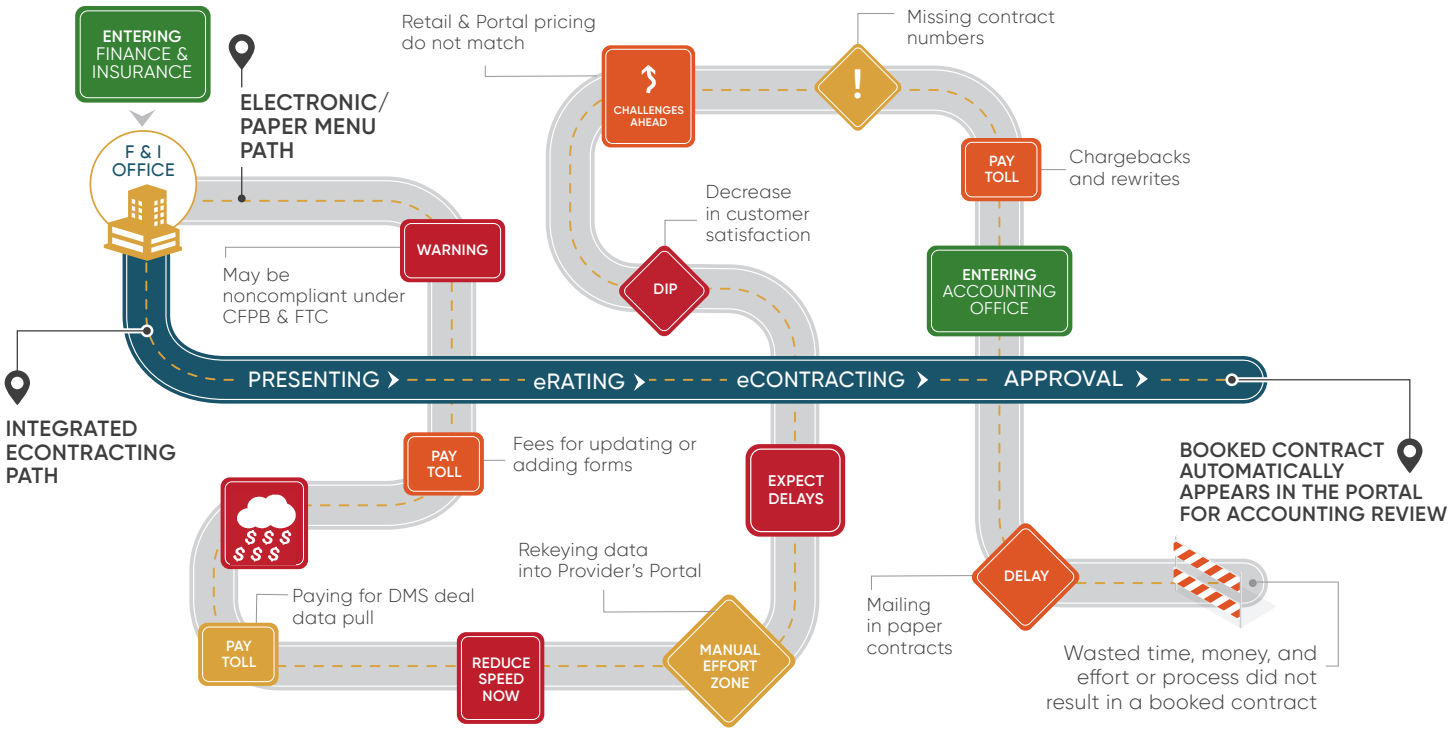
There are many ways that Dealers can contract your products other than using Integrated eContracting. However, each of these "eContracting" options are some variation of data interface or exchange. In other words, **the contracts generated outside of your System are not eContracts**.



A Dealer's NON-Integrated Process

A Dealer's F&I workflow is often littered with roadblocks that detour them away from a streamlined process, leading to slowdowns that cost time and money. Being able to identify where your Dealer's inefficiencies are puts you in a better position to advise and lead Dealers toward a better way.

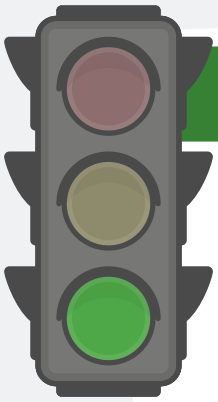
Dealers go through a lot for a sale- make it easier for them by promoting Integrated eContracting!



How to get the **FASTEST SUPPORT**

Dealers are **Supported** by their **Software System.**

DEALER AND AGENT SUPPORT



CORRECT SUPPORT PROCESS

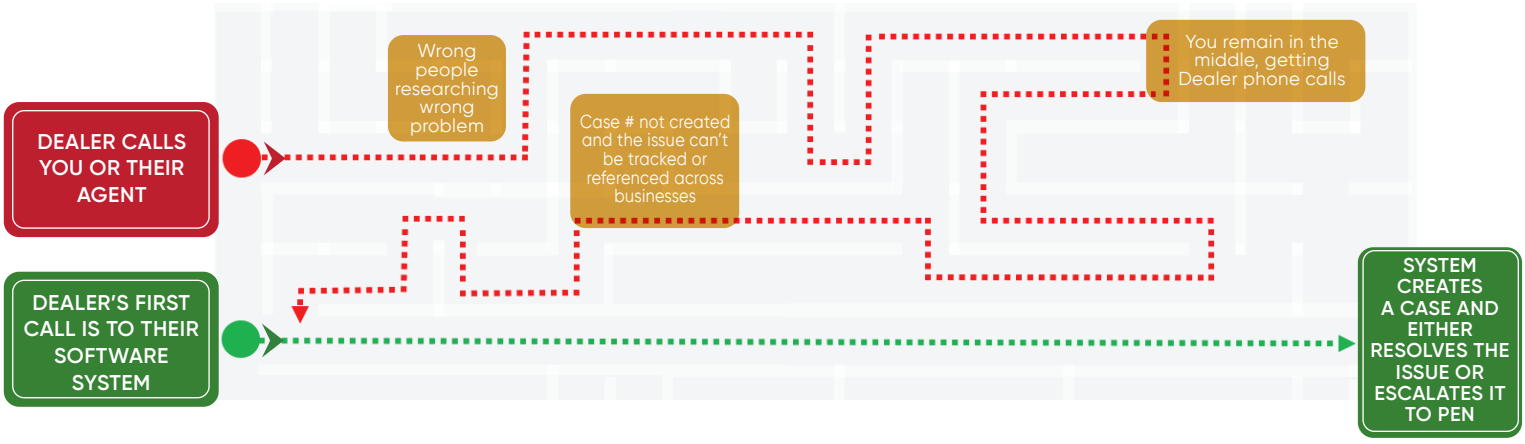
- If a Dealer or Agent calls you with technical questions, instruct them to contact their Software System Support
- If the issue needs to be escalated, the Software System will contact PEN
- A Dealer should ALWAYS contact their Software System **FIRST** for support
- A System's Support Center should not tell you or a Dealer that the problem resides with the Provider or PEN and to contact either party. IF you get a Dealer escalation, it's **essential to get the Support Case/Ticket Number** for PEN to assist.

HELP YOUR AGENTS AND DEALERS GET THE CORRECT SUPPORT

Neither you or PEN can diagnose a Dealer's problem becuase we can not access the Dealer's software, its customization, or user experience. **A diagnosis can only come from the Dealer's System.**

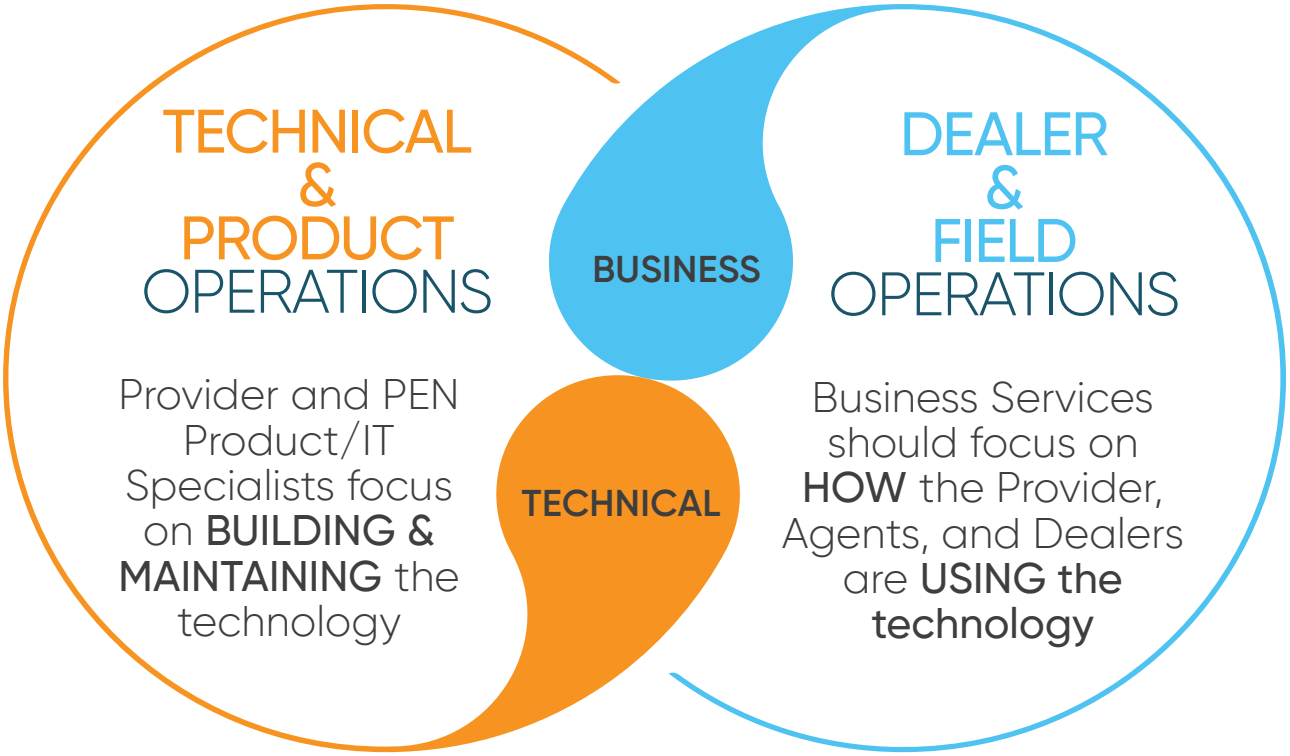
Having the Dealer call their System first is the quickest, most efficient way to a resolution, reinforces best practices and reduces the number of panicked phone calls you will get.

When a Provider, Agent, or Dealer goes outside of the correct support protocol path, it takes the Dealer farther and farther away from a resolution.



Division of **PROVIDER RESPONSIBILITIES**

Integration is not just an IT solution. The Business side needs to embrace the process too.



How does a Provider LEVERAGE the TECHNOLOGY?

PEN **INTEGRATIONS**

Manage your products as they're seen on the PEN (and therefore in the Dealer's Menu) by coordinating with PEN Integrations to avoid potential delays and frustrations.

NEW PRODUCT to integrate with PEN

API/WEB SERVICE changes

DEALER SYSTEM activation & questions

INTEGRATIONS @PROVIDEREXCHANGENETWORK.COM

BUSINESS SERVICES

The Software and Integration have technical roots but you don't have to be an "IT person" to use Integrated eContracting.
Business Services can help with:

ONBOARD Prepare Dealers to register products in their Menu

EMPOWER Educate your Field Team about the software processes

SUPPORT How you/your Reps can efficiently handle Dealer issues

MEASURE: Dealer use of Integrated eContracting to rate & contract

PENSERVICES @PROVIDEREXCHANGENETWORK.COM

PEN **SUPPORT**

- Provides **2nd Level support** to Software Systems
- **Acts as liasion** between Dealer System/Provider
- Engages Provider IT as needed

REMINDER

PEN does not interact with Dealers and cannot access Menus.

PEN cannot setup Dealers/products in the Menu or make changes to an existing registration.

If you need help checking on the status of a Support Case, we need the Case/Ticket Number given to the Dealer by their Software System's Support Center.

MOST IMPORTANT **FACTORS TO SUCCESS**

We define success as Dealers using Integrated eContracting to eRate and eContract all available products, 100% of the time. For example, a Dealer is approved to sell your VSC, GAP, and Theft products. You would want every F&I Manager to eRate and eContract all three products whenever possible.
There are two main ways to help ensure that happens.

DEALER **ONBOARDING**

Successful Dealer Onboarding begins with preparation and ends with follow-up. It consists of communications and routines to ensure that Dealers who setup Integrated eContracting did so correctly and know how to use the functionality. A breakdown at either of these points equals lost profits for you and the Dealer, wasted time and typically a rise in frustrations. These routines include:

- **System Setup Accuracy** - Correct Dealer Code, Correct Products, Dealer Activated in your System
- **Back Office Process** - Ensure the Dealer's Accounting department knows how to properly review, void, and approve booked contracts
- **Follow-Up** - Essential Agent checkpoints to ensure all users are trained and know how to get proper support from their Software System

Why would a Dealer get setup and not use Integrated eContracting?

MEASURING USAGE

Much of the value of PEN actually lies outside of the technology itself. Enter PEN Services! We are here to help your Field Reps and Business Services side of your company get the most out of Integrated eContracting. Through non-technical means, PEN Services can help you define some best practices to promote successful integration and utilization with your Dealers.

An important part of that is to recognize how the technology is being used (or not being used) by your Dealers.

- **Monthly Dealer Utilization Reports** - Use these Reports provided by PEN Services in order to:
  - **Review all Dealers registered** in the PEN and their utilization status
  - See important metrics regarding **overall and Dealer specific performance**
  - **Focus on NEWLY registered Dealers** to ensure effective Onboarding
- **Dealer Utilization Improvement Projects** - Identify different utilization categories and target specific Dealers. For example, Dealers who are:
  - **Inactive** (either never had any activity or who stopped using)
  - **eRating ONLY**
  - **Inconsistently eContracting**

Let **PEN Services** Help You, Help Your Dealers

PEN does NOT have access to a Dealer's software and therefore can NOT assist in the Dealer setup process or handle technical support issues. Dealers should ALWAYS contact their Software System for support.

However, PEN Services can help you navigate Integrated eContracting setup and help you coach Dealers through the process.

HOW PEN SERVICES CAN HELP YOU

Educational Materials

- Videos, Demos, Webinars, other collateral

How to talk to your Dealers

- How to start a conversation with Dealers about their technology
- How to evaluate a Dealer's current F&I process

Prep & Setup Materials

- Pre-Setup Checklists
- System Setup Guides
- System Demos

Customized Resources

- Collateral customized to your Provider(s)

Evaluate Internal Processes

- Discuss your current client on-boarding methods

AT PEN SERVICES, WE'VE **GOT YOUR BACK**.

Contact us to discuss how we can help you, help your Dealers

EMAIL PENServices@ProviderExchangeNetwork.com

VISIT PENRC.com

VISIT ProviderExchangeNetwork.com