



# **USER GUIDE**

## **INTRODUCTION**

VSCOnline is an Internet application developed for use by Dealers and Agents. The Internet application is designed for Vehicle Service Contract entry and certain account reconciliations. Any questions about the application can be answered in this User Guide or by clicking on the "User Guide" options in the application. The User Guide will take you through the step-by-step process of entering contracts, creating transmittals, identifying error contracts, sending and receiving messages, and running reports. Please read the User Guide carefully before entering the application so that you have a thorough understanding of how the application works. If you have any questions concerning the application, please call the Administrator or e-mail: HelpDesk@Vsconline.com.

## **APPLICATION LOGIN**

In your web browser, go to your address bar and type in [www.vsconline.com](http://www.vsconline.com). The login box will appear and you will be prompted for a user name and password. Dealers' user name will be "dl\_", followed immediately by the dealer number. (Example: dl\_908909). F&I login will be "fi\_" followed immediately by the dealer number (Example: fi\_908909). Type in your password keeping in mind that the password is "case sensitive". You (the Dealer) predefined your password on the VSC Online sign up sheet. Only the contact person listed on the sign up sheet can give out the password. The Administrator will not be able to give this password to anyone. Once you have completed entering your user name and password, you will be transferred to the VSC Online main menu screen. By logging in as a dealer (dl\_) you will be able to quote contracts, enter contracts, edit contracts and create transmittals. As an F&I individual (fi\_), you will only be able to enter/edit contracts.

## **MAIN MENU SCREEN**

The main menu screen should display your Dealer or Agent Name. If you have messages that have not been read, you will see a flashing envelope in the top right hand corner of the screen. This flashing envelope can be seen from any screen within the application. You can quickly access your messaging center by clicking on the envelope. You can also communicate with the Administrator using the Live chat option found at the top of any screen within the application. If you have any questions, concerns or need assistance, please contact the Administrator using either of these options to help expedite service. If the Live chat icon shows "Offline" a message can be left and the Administrator will be notified and respond as soon as possible.

On the left side of the screen will be a menu with nine options: Contracts, Transmittals, Reports, Customer Service, Messaging, Utilities, Download, Agent/Dealer Resources and Log Off. To expand the menu for all available options within each option listed above, click on the "+" at the top of the menu.

The following information is step-by-step instructions for each option.

**\*\*If you would like to test VSOnline before going “live”, use “test.vsonline.com”. \*\***

## **CONTRACT STATUS DEFINITIONS**

**PENDING** – Contracts that have been entered and saved successfully, ready to be placed on a transmittal for remittance. Pending contracts that have not been printed can be edited for necessary changes.

**INTRANS** – Contracts that have been placed on a transmittal and are ready for remittance to the Administrator. The VSOnline generated transmittal must be printed and mailed with a check to the address indicated on the Transmittal. Pre-printed registration pages must be remitted with the Transmittal and payment. For expedited delivery of remittances, please refer to your Procedure Manual.

**READY** – Contracts that have been remitted and received by the Administrator with payment. These contracts are scheduled for download from VSOnline into the Administrator’s internal system.

**ACTIVE** – Contracts that have been pulled over into the Administrator’s internal system for validation. To see actual contract status in the Administrator’s internal system, please refer to the Customer Service/Inquiry section herein.

**ERROR** – Contracts that have missing, invalid or incomplete information or contracts that are not eligible for coverage. If the contract is not eligible for coverage, it will be entered into the Administrators system and a letter to the customer will be mailed notifying him of such.

**QUOTE** – Contracts that have been quoted but have not been turned in to actual contracts. These contracts will automatically be placed in a Deleted status after time indicated on quote sheet if they are not saved as contracts before that time. Users can also choose to delete quotes by clicking box next to quoted contract when pulled up in contract search and choosing Delete Quote on bottom left of contract list.

## **+CONTRACTS**

### **NEW CONTRACT / QUOTE**

From here you can Rate a Contract, Quote a Contract or Enter a Contract.

#### **Step 1 –**

- Select Dealer (this option is only available if you are logged in as a sales agent)
- Enter Contract Purchase/Quote date (verify correct date is entered as this cannot be edited later)
- Select the appropriate Contract Type (program being sold or quoted)
- Enter VIN# and click on "Decode VIN"

#### **Step 2 –**

- If VIN does not decode, you will need to enter the Year, Make and Model of the Vehicle in addition to the items below.
- Enter Current Odometer
- Select Coverage Type
- Select Deductible
- Select Coverage Months/Mileage
  - CustomEdge Entry – Select Coverage Months and either enter Coverage Mileage or Expiration Mileage

- Click SURCHARGES (if applicable) and choose the Manual Surcharge as either required and/or applicable. When done click Save and box will automatically close.
- Select Quick Quote
  - You will be given Vehicle Contract \$ which can be edited to the amount customer will be charged
  - DC box to the right contains Dealer Cost within encrypted code shown
- You can make changes to any editable fields and receive new pricing by selecting quick quote after changes are made.

### Step 3 –

- The following options are available:
  - Save Quote
  - View Quote (not functional until you have Saved the Quote)
  - Enter New Quote
  - Enter Contract or Record Quote
- **Save Quote** – Allows you to Save the Quoted information without entering Customer Information. The system will provide you with your Quote #.
- **View Quote** – Displays Quoted information. You can print this quote for the customer or you can Save the Quote as a Contract at this time (if you choose to Save as Contract, you will receive notice that customer and contract information must be entered before saving as a contract).
- **Enter New Quote** – Allows you to enter a new quote for different vehicle.
- **Enter Contract or Record Quote** – Allows you to enter a Contract for the information quoted or record customer and vehicle information for a Quote that is being saved as such.
  - **Vehicle Service Contract**
    - Use System Generated Number (use when saving a quote) – as stated, use this option when saving a quote or if registration page will be printed from VSC Online for customer issue.
    - Override System Number with – Notation below option explains that this should be used if customer issue registration page is a pre-printed form – the actual contract number noted on the registration page should be entered so that we will have record of actual customer contract number for claims purposes.
  - **Primary Customer** – All fields within must be populated with the exception of the customer’s e-mail address.
  - **Alternate Customer** - If the alternate customer’s information is the same as the primary customer, select “same household as above” and all information (except the name) will copy into the Alternate Customer fields.
  - **Vehicle Information** - Enter Vehicle Purchase Price (excluding tax, title & license fees).
  - **Contract Information** –
    - Contract Charge\* shown was carried over from Vehicle Contract \$ entered or populated when performing Quick Quote – this is the amount the customer will be charged.
    - DC - contains Dealer Cost within encrypted code shown

- Finance Company - Defaults to “Full Pay” (choose if the customer pays for the Service Contract or if the Service Contract charge is included in vehicle financing). If Contract is being paid by customer through a Payment Plan, then change to reflect the appropriate Finance Company.
- Lienholder Information: complete this section only of the Service Contract is being included in the vehicle financing.

\*In Florida the Filed Retail Amount plus any applicable surcharges will be populated as Contract charge and cannot be changed. If an amount other than the amount filed and approved by the State of Florida is charged our office is required by law to notify the customer of such discrepancy. In these situations, your dealer will also be notified that the customer has been sent a notification and a copy of the customer’s notification will be provided.

**Step 4 –**

- The following options are available:
  - Save Contract
  - View Contract (not functional until you have Saved the Contract)
  - New Contract or Quote
  - Save Quote
  - View Quote (not functional until you have Saved the Quote)
- **Save Contract** – Allows user to Save Contract – **if you are using System Generated numbers and an error message is displayed that contract numbers have not been assigned – contact ADS for assistance.**
- **View Contract** – Displays pertinent information about the contract and allows user to print\* registration page or View page.
- **New Contract or Quote** – Returns user to Step 1.
- **Save Quote** – Allows user to Save Quote with added information.
- **View Quote** – Displays pertinent information about the quote and gives the user the option to save as a contract at this time or to print the View page.

**\* If you do not already have Adobe Acrobat Reader installed you will be prompted to download this program the first time you select “Print Registration Page”. Registration Pages cannot be printed from VSCOnline without this program. If you experience any problems when trying to print, please contact the ADS Department via the Messaging Center or Live Chat, providing them with the error message(s) received and the action being performed when receiving the error message(s).**

## **EDIT CONTRACT/QUOTE**

Allows User to change information previously saved on a contract or quote and/or change/correct information on a contract in Error status. Only Contracts that are in an Error status, Pending status (and have not yet been printed) or Quote status are eligible for editing.

When the Edit Contract/Quote option is selected, you will be provided with a list of contracts that are eligible for edit and will be taken through the New Contract/Quote process from Step 1 and allowed to make changes to necessary fields.

- Choose the contract you wish to edit by selecting the Contract number.
- Make changes needed.
- Save Contract or Quote to save changed information.

## **SEARCH CONTRACT**

Only Contracts entered into the VSOnline application can be searched via this method\*. You are given several parameters in which to search by. We highly recommend always using a minimum of 2 parameters in order to avoid lengthy and time consuming searches, which sometimes result in no response from your browser.

- Enter search criteria (using a valid contract number is preferable item to search by).
- Select Search.
- Select the Contract number you want to view (Active Quotes have box to left that if checked, will allowing deletion - Delete Quote button is on bottom left side of screen).
  - Pending Contracts – View Contract page will display and you can either print registration page or edit contract (as long as the registration page has not already been printed).
  - Quote Contracts – View Contract page will display and you can edit/save as a contract.
  - Active Contracts – View Contract page will display and you can print registration page.
  - Error Contracts – View Contract page will display and you can edit contract
  - Deleted or Deleted Quote Contracts – View Contract page will display with information entered

\*In order to view a Contract as it appears in the Administrator's internal system, see the Customer Service/Inquiry section herein.

## **QUOTE STATUS CONTRACTS**

If the Contract was saved as a quote and the customer has declined purchase of the Service Contract, select the check box next to the Contract number that the customer declined, then select Delete Quote.

## **SEARCH PARAMETER DESCRIPTIONS**

- Contract Number – If the Contract number is known, this is always the best method for searching.
- Date Range – The “From” date will always default 60 days into the past. Both “From” and “To” date fields must be entered.
- Contract Status – See “Contract Status Definitions” herein.

- Customer Last Name – it is recommended that this be used in combination with at least 1 to 2 additional search parameters, especially when the last name is common (i.e., Smith, Jones, etc.)
- Customer City, State, Zip – each of these fields can be searched individually but be cautious when doing so since most of your customers may be from the same geographic area. It is recommended that this be used in combination with at least 1 to 2 additional search parameters.
- Vehicle Year, Make or Model – each of these fields can be searched individually but it is recommended that this be used in combination with at least 1 to 2 additional search parameters.

### **+TRANSMITTALS**

Transmittals must be created, printed and submitted with remittance to enable the Administrator's Accounting department to pull the Contracts as listed on the Transmittal from VSCOnline into the internal system and appropriately apply the monies to each Contract as listed on the Transmittal created.

### **CREATE TRANSMITTAL**

- Cutoff Dates will be displayed as soon as "Create Transmittal" is selected. "Cutoff for Bus. Received" column lists the dates for business that is not entered into VSCOnline. "VSCOnline Cutoff" column lists the dates for business that is entered into VSCOnline.
- Program Type – here the dealer will have the option to put Contracts for each program type on their own transmittal or they can select "All Programs" and all contracts will be displayed.
- Payment Type – Select Full Pay or Mepco (3<sup>rd</sup> party financed Contracts) from the drop down. Each payment type must be remitted separately.
- VSCOnline will display all pending contracts that are ready to be placed on a transmittal. Check each Contract, or select "Check All", that you plan to remit.
- Type in your name as the preparer (VSCOnline will not allow you to continue until this field is populated).
- Select Create Transmittal.
- When processing is complete, select View Transmittal.
- Print the transmittal, attach the Administrator copy of the Contracts (if applicable) and check (payable as listed on the transmittal) and send to the address that is indicated on the Transmittal.

**NOTE:** Administrator Contract copies are only required with remittance if pre-printed field issued forms were used.

### **VIEW TRANS**

This option will allow you to view transmittals that you have created in the interim of the business being pulled into the Administrator's internal system. You can also reprint and/or print additional copies of transmittals from this screen.

- The initial screen will show you all the transmittals and their amounts. It will list the original Contract count and total dollar amount of the transmittal as well as the number of Contracts pending transfer and the total dollar amount pending to be applied.
- Select the transmittal you want to view.

- The top right hand corner will show the remaining Balance Due. The “R” column will shown an “X” for those Contracts that have transferred from VSCOnline into the Administrator’s internal system and will be blank for those that are still pending transfer. The total amount due of those Contracts still pending transfer should match the Balance due in the top right corner of the transmittal.

## **+REPORTS**

There are two different reports that can be run, Error Report, and Dealer Statements. You will be required to enter your user name and password prior to having access to the Dealer Statements. Below is a description of each:

### **ERROR REPORT**

When selected VSCOnline will display a list of all Contracts, their Contract Purchase Date, Customer Last Name and Error Description. To edit Contracts in order to correct them, refer to the Edit Contract section.

### **DEALER STATEMENTS**

When selecting Dealer Statements, VSCOnline will automatically require you to enter your user name and password as you did when initially logging in, prior to having access to the Dealer Statements. If you receive an error and are not allowed to view the Dealer Statements then contact ADS via the Messaging System or Live Chat with this information so you can be properly setup to access your Dealer Statements.

Once Dealer Statements has been accessed, VSCOnline will display the Dealer Statement for all account activity in the previous month’s business. The statement for the previous month’s business should be available no later than the 10<sup>th</sup> of the following month. Statement’s for month’s past can also be generated by selecting the desired Financial Month from the drop down box(s).

## **+CUSTOMER SERVICE**

### **INQUIRY**

This method will allow the user to search for Contracts as they are in the Administrator’s internal system. This will show the validated Contract, its Status, Claims Activity, Allow Cancellation Quotes, etc. Contracts do not have to have been entered via the VSCOnline Application to be found here.

- Enter either the last eight (8) characters of the VIN, the Contract number or the Claim Reference Number (if applicable). Any combination of the three can also be used for searching.
- Select Submit.
- VSCOnline will list all Contracts fitting your search criteria.
- Select the Contract you wish to view for more details.
- From the next screen you will have three options:
  - View the details of the Contract (i.e., Coverage, Term, Customer Information, Vehicle Information, etc.).
  - View the details of a claim and/or subclaim.
  - Submit a cancellation quote.

(NOTE: Requesting a cancellation quote will place the Contract in a Pending Status until the appropriate cancellation documentation is received. A cancellation quote in VSCOnline does not constitute a cancellation request and the cancellation documentation must still be submitted to the Administrator to process the cancellation request and receive a refund).

### **+MESSAGE SYSTEM**

Email messaging system that allows communication with the Administrator's Agent/Dealer Services (ADS) and/or Claims/Customer Service departments. Below is an explanation of the different messaging systems:

- **"Inbox"** - These are messages that have been sent to you from other users. A "new" message will be bold and have an unopened envelope next to it. A previously viewed message will not be bold and will have an opened envelope next to it. To view a message, simply click on the envelope. When you no longer need the message displayed, simply "delete" the envelope by clicking on the "X" in the middle right hand side of the screen. The button next to the delete button, with the person and arrow, is the reply button should you need to reply to a message sent to you.
- *Creating New Messages* – **"New Message"** – Click on the icon to bring up the message screen that will appear at the bottom of your screen. You will see that you can select the recipient in the pull-down menu. Type in the subject and body of the message and if needed, type in a contract number that will automatically be attached to the message when you send. Click on the "Send" button to send the message. Please be sure to select the appropriate recipient for your message.
- *Your Outbox* – You can view all of the messages that you have "sent" to others by viewing the messages in this box. The recipient has not read any message that is still bold and has an unopened envelope next to it. Once the recipient has read the message, the message will not be bold and the envelope will be opened. The recipient has deleted envelopes that have a red "X" through them. You can view the contents of the messages you have sent, by clicking on the envelope of the message. When you no longer need the message in your outbox, delete it by clicking on the "X". Note: deleting a contract from your outbox, will not prevent the recipient from receiving or being able to open the message that was sent the them.

### **+UTILITIES**

#### **VIN DECODER**

When a VIN is entered into this screen, the vehicle attributes will be provided.

#### **+DOWNLOAD**

#### **RATE DISK**

We provide the most current Rate Disk available with instructions to download to your computer.

## **+AGENT/DEALER RESOURCES**

### **DOWNLOAD FORMS**

We provide a PDF of various forms that you may need.

- Transfer Form
- Cancellation Request Form
- VSCOnline Claims Setup Form
- Dealer Contact Sheet

### **PROGRAM INFORMATION**

We provide PDF's of the Procedure Manual; Coverage; Benefits; Exclusions; Customer Brochure; Vehicle Eligibility, etc., of the various programs that we offer.

### **USER GUIDE**

VSCOnline User Guide

### **REQUIREMENTS**

A list of requirements needed to utilize VSCOnline

### **TRAINING VIDEOS**

There are multiple videos in this section on how to use VSCOnline. The videos cover all topics listed above.