

# Dealer Portal Quick Reference Guide



**LIBERTY**  
**SHIELD**®™

## Introduction

Welcome to Liberty Shield Dealer Portal! The Dealer Portal is a look inside our Policy Administration system and gives more visibility into business done with Vehicle Service Contracts and GAP Coverage. The Dealer Portal is meant to help the Dealer manage their business in an easy and more effective way.

You can find the Dealer Portal at <https://libertyshieldusa.com>. We hope you enjoy this tool!

See the following pages for Information on using the Dealer Portal.

**Add Contract (Pages 3 – 11):** Electronically rate contracts, view both retail and remit rates, electronically submit contracts

**Quick Rater (Pages 12 – 16):** Electronically rate contracts (view the Dealer Cost of all coverages and terms for a vehicle)

**Save a Quote (Pages 17 – 18):** Save a quote to bring up later and finish a deal.

**Search Contract (Pages 19 – 20):** Search for and view contracts and their statuses

**Search Dealer (Page 21):** View your Dealer information

**Sales Summary Report (Pages 22 – 23):** View Month-to-Date and Year-to-Date Sales Data

**Claim Management Listing Report (Pages 24 – 25):** View Claims status and information

**Claim Details Report (Pages 26 – 27):** View Claims payout and summary

## Add Contract

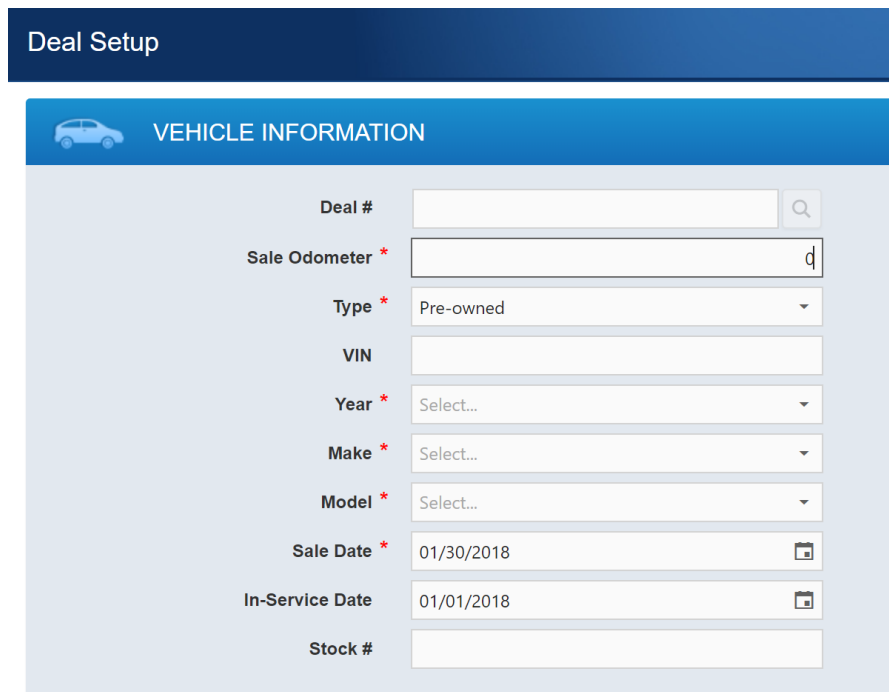
The Add Contract function of the Dealer Portal allows you to electronically rate and submit a contract. All eligible products for the vehicle will display with prices for each term.

### Steps to Use:

1. **Open Add Contract:** The Add Contract tool can be found in the menu bar on the left of the screen under "Contract"; clicking on the Add Contract link will open a new tab in your browser. If no new tab opens, watch for a flash in the top right corner of your screen when you click Add Contract. An icon should appear which you will click and select "Always allow pop ups from this site." Let us know if this doesn't resolve the issue.




2. **Enter the Vehicle Information:** The left side of the screen requires vehicle information to be entered; required fields have a red asterisk next to them. The Year, Make, and Model are all required, but can be decoded when the VIN is entered, and the fields will automatically populate the information. Sale Date is the date you enter the contract, this is not the Vehicle Sale Date, you will have the opportunity to add a vehicle purchase date later. Please note, the Sale Date cannot be backdated.

A screenshot of a web form titled "Deal Setup" with a dark blue header. Below the header is a section titled "VEHICLE INFORMATION" with a car icon. The form contains several fields: "Deal #" (text input), "Sale Odometer \*" (text input with a red asterisk and a search icon), "Type \*" (dropdown menu with "Pre-owned" selected), "VIN" (text input), "Year \*" (dropdown menu with "Select..." selected), "Make \*" (dropdown menu with "Select..." selected), "Model \*" (dropdown menu with "Select..." selected), "Sale Date \*" (text input with "01/30/2018" and a calendar icon), "In-Service Date" (text input with "01/01/2018" and a calendar icon), and "Stock #" (text input).

## Add Contract cont.

- Enter Financial Information:** The right side of the screen requires “Vehicle Purchase Price” to be entered and has a red asterisk. We also request you complete the Lender Search if the vehicle is financed.

**FINANCIAL INFORMATION**

Finance Type	Select...
Vehicle Purchase Price *	\$0.00
Amount Financed	\$0.00
Finance/Lease Term	0
APR	0.00%
Monthly Payment	\$0.00
MSRP/NADA	\$0.00
Lender Search	<input type="text"/> 
Lender Name	<input type="text"/>

- Lender Search:** Click the magnifying glass and you can type in the name of your lender to see if it already exists in our system.

**Lenders**

Search Clear filters Add Lender Close

Name	Address	City	State
westlake			
Westlake			
WESTLAKE	PO BOX 76809	LOS ANGELES	CA
Westlake Financial	PO BOX 76820	LOS ANGELES	CA
Westlake Auto Finance			
Westlake Fiancail Services			
Westlake Fiancial			
Westlake Fiancial Services			
Westlake Fianncial Services			
Westlake Fin			

5 10 20 1 2 3 4 5 6 7 8 9

## Add Contract cont.

- Add Lender:** If your Lender is not yet in our database, click the Add Lender icon and then enter the required information.

The screenshot shows a 'Lenders' management interface. At the top, there is a header 'Lenders' and a toolbar with buttons for 'Search', 'Clear filters', '+ Add Lender' (highlighted with a red box), and 'Close'. Below this is a modal window titled 'Add Lender' containing the following form fields:

**Lender Information**

- Status: Active (dropdown)
- Name: \* (text input)
- Type: Select... (dropdown)

**Mailing Address**

- Address 1: \* (text input)
- Address 2: (text input)
- Zip Code: \* (text input) | State: \* (dropdown)
- City: \* (text input) | verify (button)
- Country: \* (dropdown) | United States

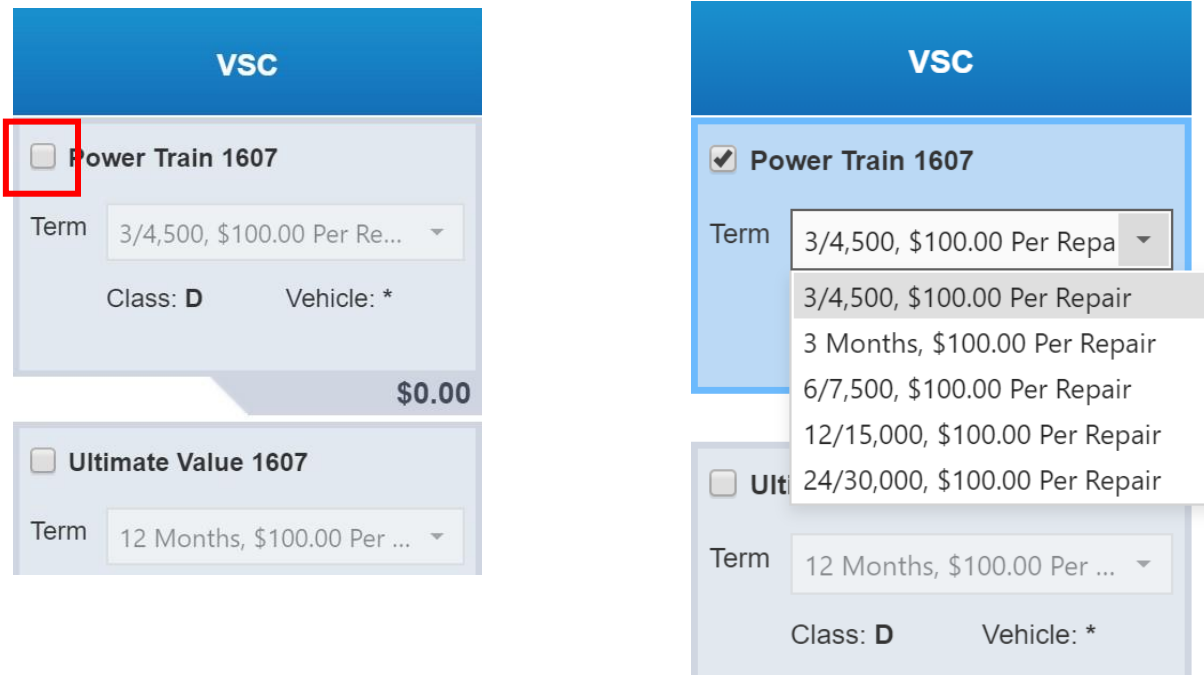
At the bottom of the form are 'Save' and 'Cancel' buttons.

- Continue to Product Selection:** After you have entered all the Vehicle and Financial information, use the blue arrow in the top right corner to advance to the next page.

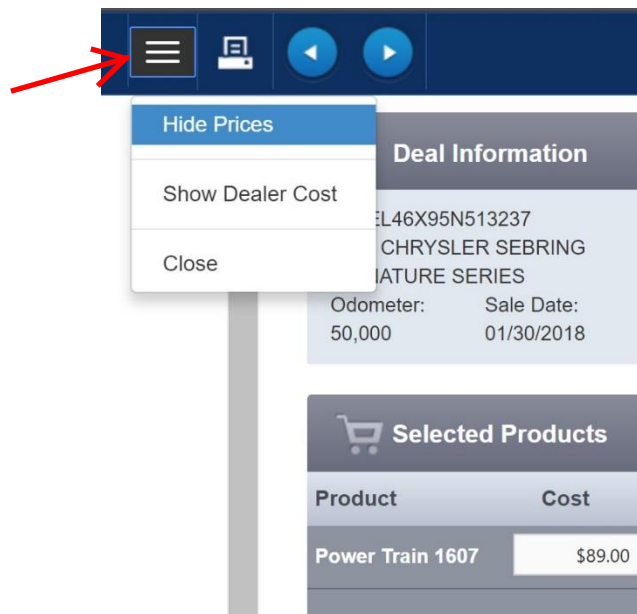


## Add Contract cont.

- Select Products:** The next page will return the entire list of products for which the vehicle is qualified. Each box is a different coverage and once you select a program's checkbox you will be able to pick the term you want from the drop down. If there are no product results this may mean the vehicle is ineligible. You can reference the ineligibility list on your Dealer Rate Card or contact our Dealer Services department with any questions.

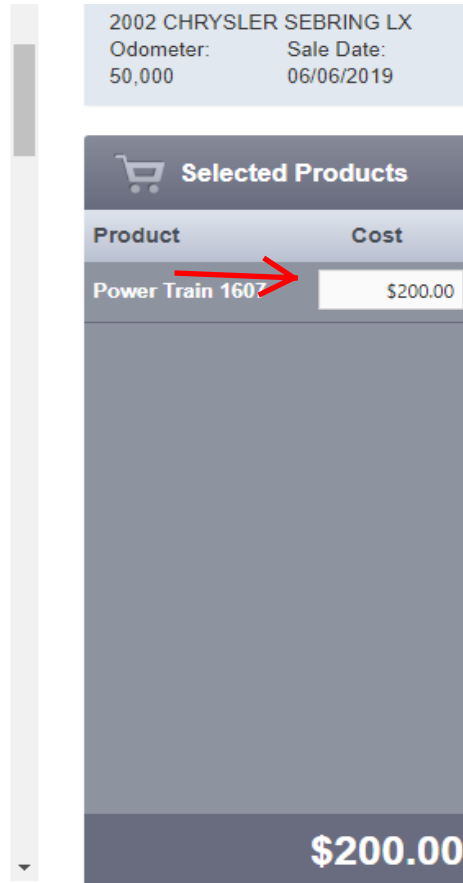


- View Product Pricing:** The price of the program will be displayed on the right. You can switch between the Dealer Cost and the Retail price by clicking the indicated icon and choosing "Show Dealer Cost" or "Show Retail"



## Add Contract cont.

9. If you choose "Show Retail", the box underneath the Cost header of the Selected Products section will be white, and you will be able to edit the amount your customer is being charged for the contract.



10. **Continuing to Customer Information:** You can use the Printer icon to print a quote or the right arrow to proceed.



## Add Contract cont.

- Customer Information:** Enter all the required customer information. At this point you will have one last opportunity to edit the Retail Price if you did not choose to earlier.

CUSTOMER INFORMATION	VEHICLE INFORMATION	FINANCIAL INFORMATION
First Name * <input type="text"/> Last Name * <input type="text"/> Alt. Name <input type="text"/> Address 1 * <input type="text"/> Address 2 <input type="text"/> Zip Code * <input type="text"/> State * <input type="text"/> City * <input type="text"/> <input type="button" value="verify"/> Country * <input type="text" value="United States"/> Language <input type="text" value="English - United States"/> Primary Phone * <input type="text"/> <input type="text"/> ext # <input type="text"/> Secondary Phone <input type="text"/> <input type="text"/> ext # <input type="text"/> Email Account <input type="text"/>	Deal # <input type="text"/> Sale Odometer 50,000 Type U VIN * 4C3AG42H822E88055 Year 2002 Make CHRYSLER Model SEBRING LX Sale Date 06/06/2019 In-Service Date 01/01/2002 Stock # <input type="text"/> Vehicle Sale Date * <input type="text"/>	Finance Type <input type="text"/> Vehicle Purchase Price \$2,700.00 Amount Financed \$0.00 Finance/Lease Term 0 APR 0% Payment \$0.00 MSRP/NADA \$0.00 Lender Name <input type="text"/> F&I Manager/Seller <input type="text" value="Select..."/>

SELECTED PRODUCTS			
Contract #	Ref #	Description	Retail
		Power Train 1607	\$200.00
			\$200.00

- You can use the Printer icon to preview a sample version of the contract or the right arrow to SUBMIT the contract. Once submitted, you cannot change the contract. If you've made a mistake and need a correction, call our sales department at 888-335-6838 or email sales@carspp.com .

- Once you submit the contract, a message box will pop up informing your customer of their option to sign the contract using the eSignature function. If they choose to use this function, check the agreement box and then click the "Accept" button.

Contract #	Reference #	Coverage	Retail
ACE39017		Flex-Protect - Level 1-1710	\$178.00
			\$178.00

**eSignature confirmation**

**Customer:** You have an option to use eSignature and sign the documents electronically, or, if you prefer, the documents will be printed out for your standard signature.

**Selling Dealer:** After the customer signs this service contract, either electronically or by hand, you are **required** to print and provide a hard copy of this service contract to your customer. Also, please print a copy for your records.

I agree to use electronic record and signatures. [\(View Details\)](#)

## Add Contract cont.

14. After clicking the “Accept” button, you will be redirected to a screen with a signature field displayed at the top and the contract shown below. The customer can now use the mouse to sign within the box.

Signature 1 of 1


CustomerSignature

are now signing for contract # LSE75460 Liberty Shield - High Mileage - Level 3 1909

Done

+

For Customer Service or Claims call 833-771-0301



**LIBERTY SHIELD**™

Form 125 B1024 1909

**APPLICATION / SERVICE CONTRACT**

15. Once the customer has signed, the “Done” button will turn blue and can be clicked.

Signature 1 of 1

CustomerSignature

are now signing for contract # LSE75460 Liberty Shield - High Mileage - Level 3 1909

Done

+

For Customer Service or Claims call 833-771-0301



**LIBERTY SHIELD**™

Form 125 B1024 1909

**APPLICATION / SERVICE CONTRACT**

OWNER'S NAME TEST TEST	DATE OF VEHICLE PURCHASE 02/10/2020	CONTRACT NO. LSE75460
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16. After you have clicked the “Done” button, a second button saying “View and Close” will appear. After clicking this button, an additional tab will be opened, showing a completed contract, with a signature, for you to print out for yourself and the customer.

are now signing for contract # LSE75850 Liberty Shield - Used - Level 2 Comprehensive - 1909

View and Close

+

For Customer Service or Claims call 833-771-0301



**LIBERTY SHIELD**™

Form 125 B1024 1909

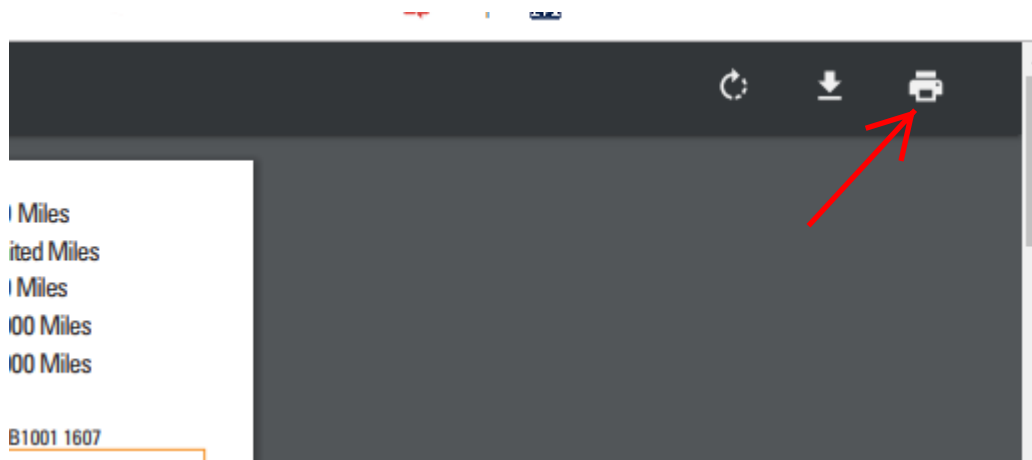
**APPLICATION / SERVICE CONTRACT**

OWNER'S NAME TEST TEST	DATE OF VEHICLE PURCHASE 02/10/2020	CONTRACT NO. LSE75850
OWNER'S ADDRESS 123	VIN # 4T1BF1FK4DU661207	
CITY MURRYSVILLE	STATE PA	ZIP 15668
OWNER'S PHONE (999) 999-9999	YEAR 2013	MAKE TOYOTA
	MODEL Camry L	CURRENT ODOMETER 50,000



## Add Contract cont.

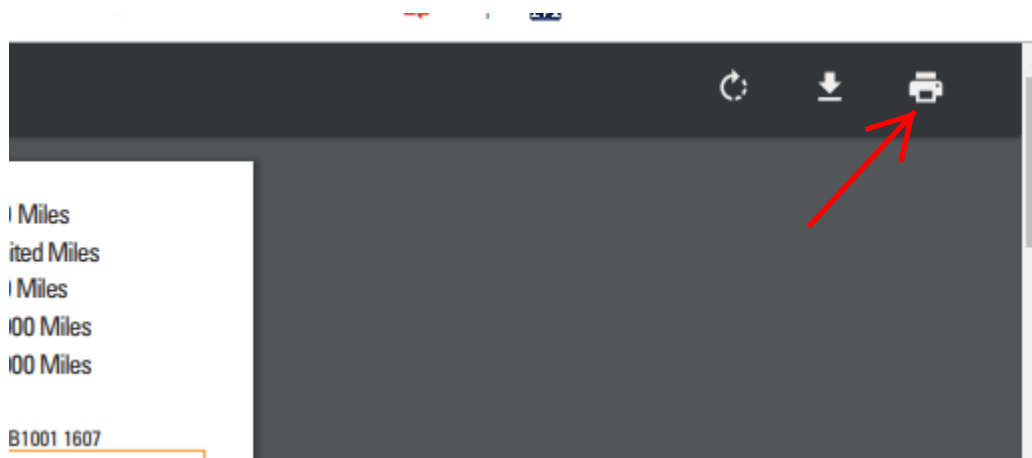
17. To print out the PDF, click the Print button in the top right corner of the screen when it appears.



18. If your customer chose to decline the eSignature, you will be taken directly to a new tab with a PDF of the unsigned contract for you to print out copies for the:

- \*\*Customer Copy
- \*\*Dealer Copy
- \*\*Remittance Copy

Use the Print button in the top right corner of the screen to print out the PDF. Once printed, have your customer sign these copies.



## Add Contract cont.

19. Once you have printed out the copies you need, exit out of the pdf tab. If you have another contract to enter, use the New Contract icon. Otherwise, click Close to end the process.


Purchased Products 📄 ☰ 🖨️ ⏪ ⏩

📄 Send To DMS

**🛒 PURCHASED PRODUCTS**

Status	Send To DMS	Contract #	Reference #	Coverage	Retail
Pending	<input type="checkbox"/>	PWTE10000051		Power Train 1607	\$89.00
Grand Total:					\$89.00

New Contract Close

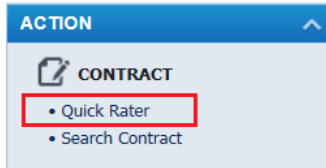
Contracts have been successfully saved, please click the Print  icon in the upper right corner to print the documents. Please make sure to remit your business according to your agreement with the provider.

## Quick Rater

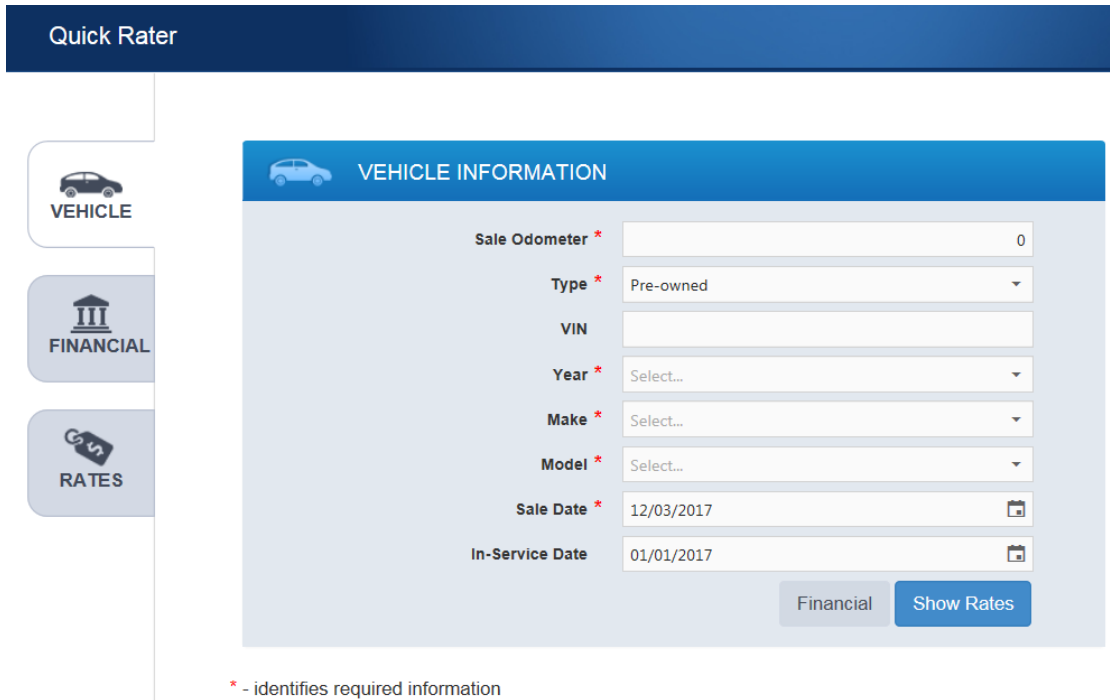
The Quick Rater function of the Dealer Portal allows you to electronically rate a contract using only the vehicle VIN number, Odometer, and Sale Price. All eligible products for the vehicle will display with prices for each term.

### Steps to Use:

1. **Open the Quick Rater:** The Quick Rater tool can be found in the menu bar on the left of the screen under "Contract"; clicking on the Quick Rater link will open up a new tab in your browser.



2. **Enter the Vehicle Information:** The first screen displayed requires vehicle information to be entered; required fields have a red asterisk next to them. The Year, Make, and Model are all required, but can be decoded when the VIN is entered and the fields will automatically populate the information.

A screenshot of the "Quick Rater" form. The form has a blue header bar with the text "Quick Rater". On the left side, there is a vertical navigation menu with three buttons: "VEHICLE" (with a car icon), "FINANCIAL" (with a building icon), and "RATES" (with a dollar sign icon). The main form area is titled "VEHICLE INFORMATION" and contains several input fields. The fields are: "Sale Odometer" (with a red asterisk and a value of 0), "Type" (with a red asterisk and a dropdown menu showing "Pre-owned"), "VIN" (empty), "Year" (with a red asterisk and a dropdown menu showing "Select..."), "Make" (with a red asterisk and a dropdown menu showing "Select..."), "Model" (with a red asterisk and a dropdown menu showing "Select..."), "Sale Date" (with a red asterisk and a date of 12/03/2017), and "In-Service Date" (with a date of 01/01/2017). At the bottom right of the form, there are two buttons: "Financial" and "Show Rates". A legend at the bottom left of the form states: "\* - identifies required information".

## Quick Rater cont.

1. **Enter Financial Information:** Once you have entered the Vehicle Information, click on the “Financial” button to navigate to the Financial Information screen. The only field required in this screen is the Vehicle Purchase Price

Quick Rater

VEHICLE

FINANCIAL

RATES

### FINANCIAL INFORMATION

Finance Type	Select...
Vehicle Purchase Price *	\$0.00
Amount Financed	\$0.00
Finance/Lease Term	0
APR	0.00%
Monthly Payment	\$0.00
MSRP/NADA	\$0.00

Vehicle Show Rates

\* - identifies required information

2. **View Rates:** When both Vehicle Information and Financial Information have been entered, click on the “Show Rates” button to display pricing for the eligible coverages.

Quick Rater

2009 GMC Acadia SLT-2 1GKEV33D39J172946  
Sale Odometer 52,000 Sale Date 06/19/2019

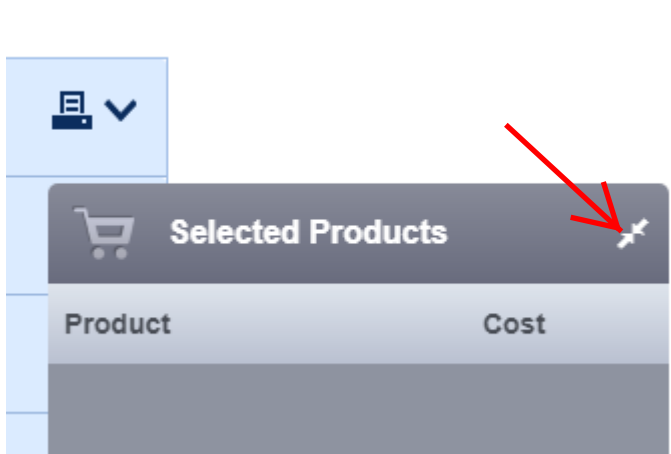
Product Type All

Flex Protect - Level 1 1807	
Flex Protect - Level 2 1807	
Flex Protect - Level 3 1807	
Flex Protect - Level 4 1807	
Independence 1607	
Power Train 1803	

Product	Cost
---------	------

## Quick Rater cont.

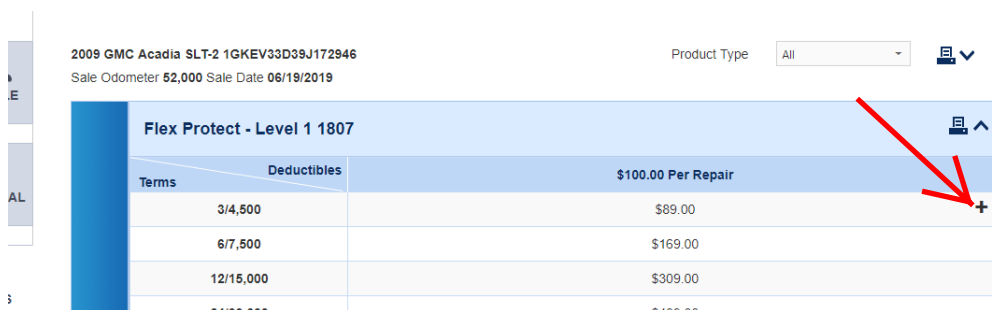
- Depending on the size of your screen, the cart may be in the way of the drop-down arrows, press the collapse button at the top right of the cart in order to minimize the window.



- Expand Rates:** Rates can be expanded to be viewed by using the drop-down arrows on the right. Rating for an individual product can be expanded, or all can be expanded using the upper most arrow. The print button located next to the drop-down arrow can be used to print out a summary of coverage for a quote.

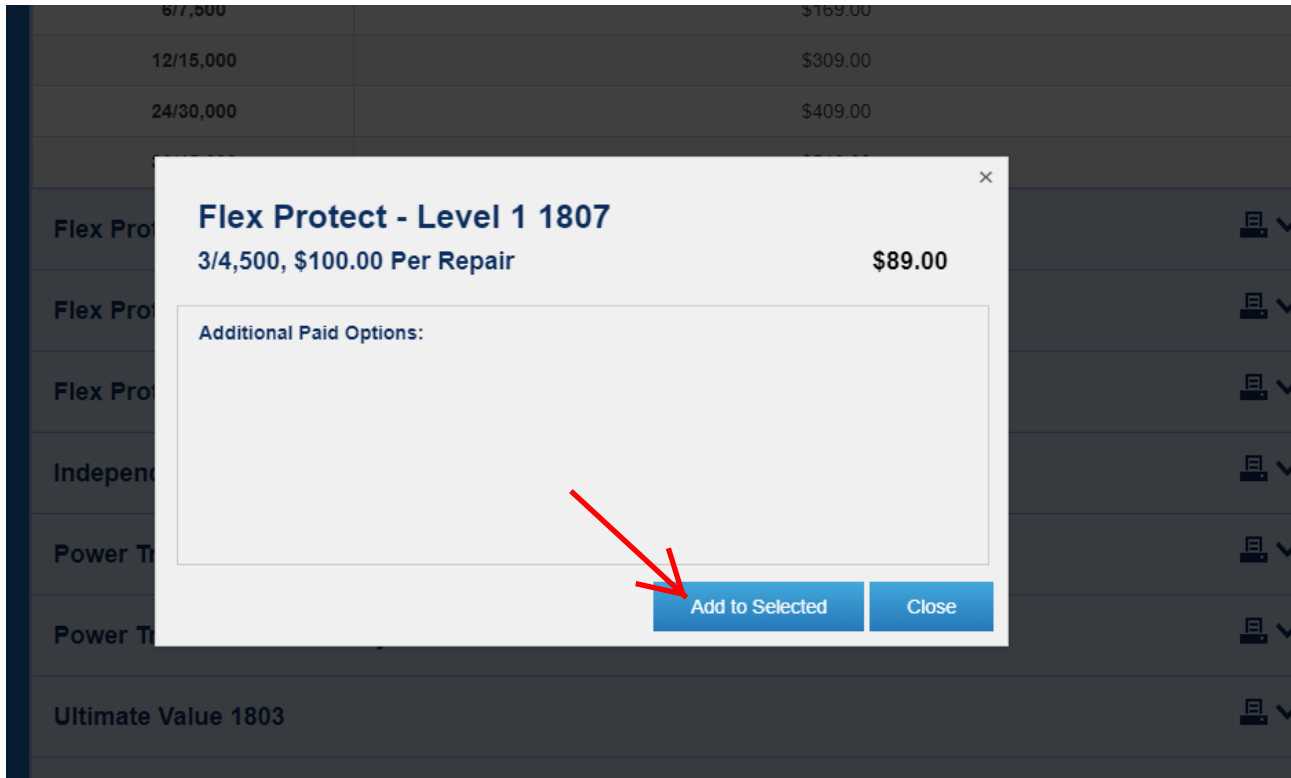


- When hovering over a coverage option, a "+" button will appear in the row. Click on the button in order to bring up a preview pop up of the coverage.

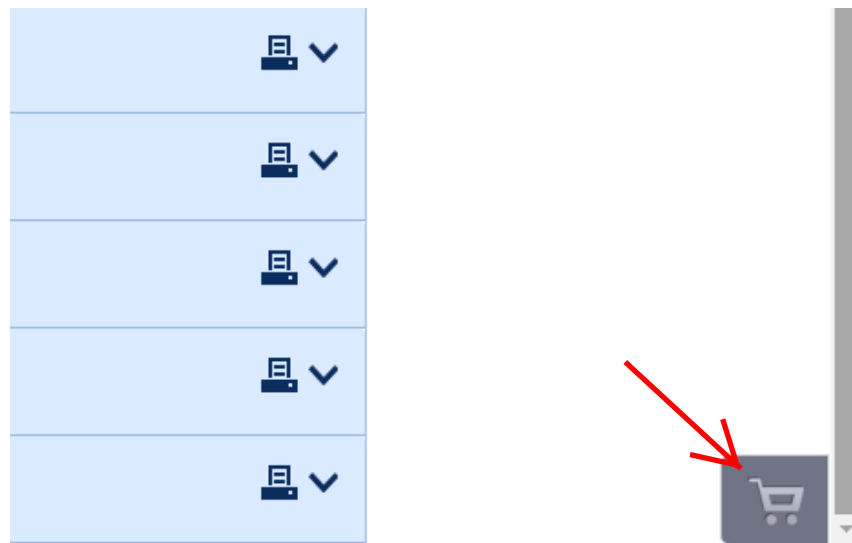


## Quick Rater cont.

1. In this pop up you will see the type of coverage you have selected, the term, and the cost of the coverage. If everything is correct, and the customer would like this coverage, click the “Add to Selected” button to add that coverage to your cart.

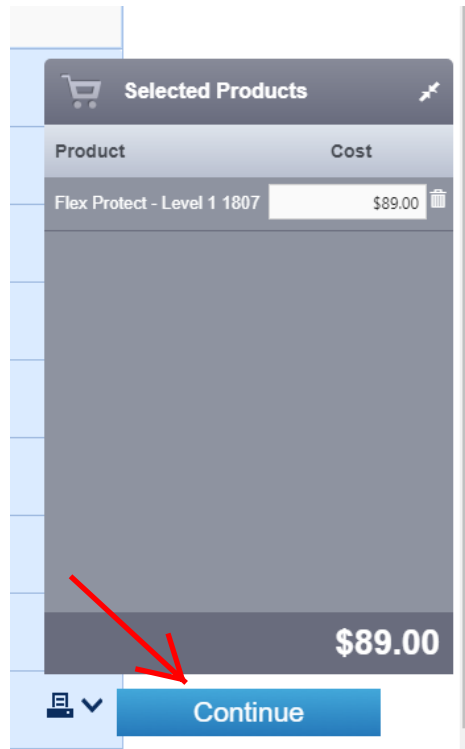


2. Once you've added the coverage to your cart, click the cart button in the bottom right of the screen to bring up your currently selected coverage.



## Quick Rater cont.

1. With your cart pulled up, click the "Continue" button to go to the "Customer Information" screen.



2. From this screen you will be able to finish the rest of the contract entry process like normal.

Customer Information

CUSTOMER INFORMATION	VEHICLE INFORMATION	FINANCIAL INFORMATION
<p>First Name * <input type="text"/></p> <p>Last Name * <input type="text"/></p> <p>Alt. Name <input type="text"/></p> <p>Address 1 * <input type="text"/></p> <p>Address 2 <input type="text"/></p> <p>Zip Code * <input type="text"/> State * <input type="text"/></p> <p>City * <input type="text"/> <input type="button" value="verify"/></p> <p>Country * <input type="text" value="United States"/></p> <p>Language <input type="text" value="English - United States"/></p> <p>Primary Phone * <input type="text"/> ext # <input type="text"/></p> <p>Secondary Phone <input type="text"/> ext # <input type="text"/></p> <p>Email Account <input type="text"/></p>	<p>Sale Odometer 52,000</p> <p>Type U</p> <p>VIN * 1GKEV33D39J172946</p> <p>Year 2009</p> <p>Make GMC</p> <p>Model ACADIA SLT-2</p> <p>Sale Date 06/19/2019</p> <p>In-Service Date 01/01/2009</p> <p>Vehicle Sale Date * <input type="text"/></p>	<p>Finance Type</p> <p>Vehicle Purchase Price \$2,500.00</p> <p>Amount Financed \$0.00</p> <p>Finance/Lease Term 0</p> <p>APR 0%</p> <p>Payment \$0.00</p> <p>MSRP/NADA \$0.00</p> <p>Lender Name</p> <p>F&amp;I Manager/Seller <input type="text" value="Test Dealer"/></p>

SELECTED PRODUCTS			
Contract #	Ref #	Description	Retail
		Flex Protect - Level 1 1807	\$89.00
			\$89.00

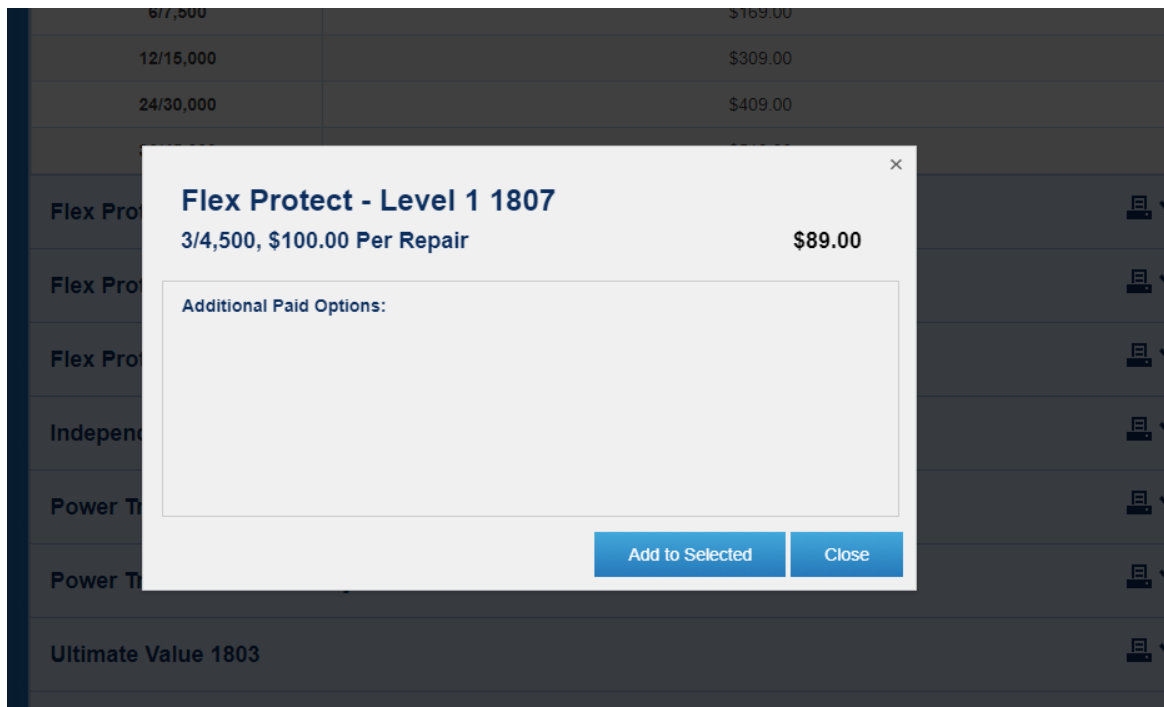
\* - identifies required information

## Saving a Quote

If your customer isn't completely ready to purchase the vehicle, you have an option of saving the quote within the system and bringing it back up whenever you are ready to move forward with the deal.

### Steps to Use:

1. Enter the vehicle information and fill out the vehicle information, financial information, and select a product to get the rate pulled up

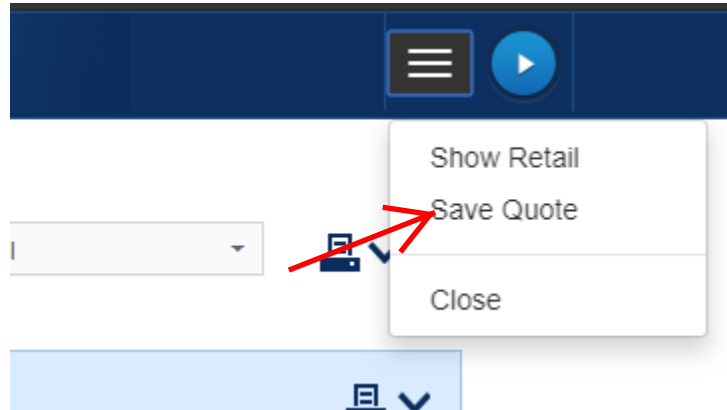


2. Once you click the "Add to Selected" button, the rate will be able to be saved. In order to save the quote, click the three-bar menu at the top of the screen.

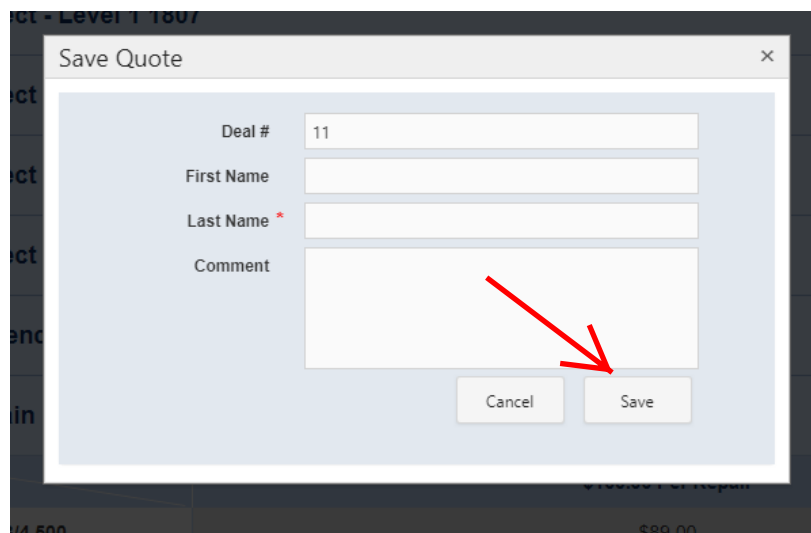


## Saving a Quote cont.

- When you click the menu, a dropdown will appear with the options Show Retail, Save Quote, and Close. Click the Save Quote option.



- Once you choose to save the quote, a pop-up window will appear asking you to fill out the Deal #, First Name, and Last Name of the customer. Only the last name is required, but you will need a Deal # in order to search for the saved quote later. Once you've filled out all the information, click the "Save" button.

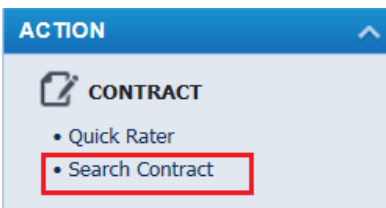
A screenshot of a 'Save Quote' pop-up window. The window has a title bar with the text 'Save Quote' and a close button (X). The main area of the window contains four input fields: 'Deal #' with the value '11', 'First Name', 'Last Name \*', and 'Comment'. Below the input fields are two buttons: 'Cancel' and 'Save'. A red arrow points to the 'Save' button. The background of the window is light blue and white.

## Search Contract

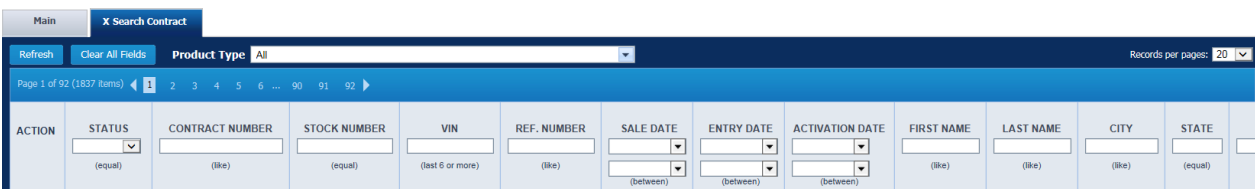
The Dealer portal gives visibility into any of your contracts we've received, in any state. Contracts can be searched for and viewed, regardless of if the contract is in-force or not.

### Steps to Use:

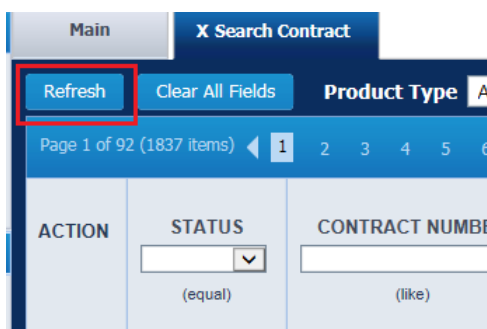
1. **Open Search Contract Screen:** The Search Contract screen can be found in the menu bar on the left of the screen under "Contract"; clicking on the Search Contract link will open a new tab in the Dealer Portal main screen.



2. **Search for a Contract:** Once you click the "Search Contract" button, a tab will be opened showing multiple search criteria and all your entered contracts with the most recent entry at the top. Any of the criteria can be used to search for contracts.

A screenshot of the "Search Contract" screen. At the top, there are tabs for "Main" and "X Search Contract". Below the tabs, there are buttons for "Refresh", "Clear All Fields", and a "Product Type" dropdown menu set to "All". On the right, it says "Records per page: 20". Below this is a pagination bar showing "Page 1 of 92 (1837 items)" and page numbers 1 through 92. The main area contains a table with columns: ACTION, STATUS (with a dropdown), CONTRACT NUMBER (with a search box and "(like)" below), STOCK NUMBER (with a search box and "(equal)" below), VIN (with a search box and "(last 6 or more)" below), REF. NUMBER (with a search box and "(like)" below), SALE DATE (with a search box and "(between)" below), ENTRY DATE (with a search box and "(between)" below), ACTIVATION DATE (with a search box and "(between)" below), FIRST NAME (with a search box and "(like)" below), LAST NAME (with a search box and "(like)" below), CITY (with a search box and "(like)" below), and STATE (with a search box and "(equal)" below).

When you've entered the criteria you want to use to search, click the "Refresh" button at the top left of the screen. Please note, more fields are likely available to search by, using the scroll bar at the bottom of the window.

A close-up screenshot of the "Search Contract" screen. The "Refresh" button is highlighted with a red rectangular box. Other visible elements include the "Clear All Fields" button, the "Product Type" dropdown menu, and the beginning of the search criteria table.

## Search Contract cont.

- View Contract:** To view the contract, click on the Contract Number. The Contract will open a new tab in the Dealer Portal main screen. The Contract information displays in the Main tab, including customer, vehicle, and loan/lease information. If you wish to print out a copy of the contract, click the printer button in the top bar menu.

**13029201 - Cars Protection Plus** Currency: \$ | VSC | **ACTIVE**

Contract Number	10000014	Sale Date	12/03/2017	Sale Odom (mi.)	85,798	Exp Odom (mi.)	93,298
Ref. Number		Effect Date	12/03/2017	Effect Odom (mi.)	85,798	Exp Date	06/03/2018
Stock #		In-Service Date	01/01/2005	Deal		Billed Date	12/03/2017

**Main** | Coverage

**Customer Information**

First/Last Name: JOHN DOE  
 Primary Phone: ( ) - - ext.   
 Secondary: ( ) - - ext.   
 Email:   
 Co-Buyer/Alt. Name:   
 Language: English - United States

Country: United States | F&I Manager:   
 Address 1: 123 MAIN STREET  
 Address 2:   
 Zip Code: 15668 | State: PA  
 City: MURRYSVILLE

**Vehicle Information**

VIN: 1D7HE22K45S188196 ✓ | Type: Pre-owned | Color: | Nitrogen Installed:   
 Year: 2005 | Make: DODGE | Model: Dakota ST  
 Warranty In-Service:

**Loan/Lease Information**

Finance Type		Account Number	
Vehicle Purchase Price	\$9,999.00	Amount Financed	\$0.00
MSRP/NADA	\$0.00	Balloon Amount	\$0.00
Finance/Lease Term	0	APR	0.00%
Monthly Payment	\$0.00	First Payment Date	
Total of Payments	\$0.00		

- View Coverage:** Coverage information can be viewed under the Coverage tab. You will see the coverage, term, mileage, dealer cost, and retail cost of the contract.

**Main** | Coverage

**Coverage Information**

Coverage: PWT-1607 - Power Train 1607 | Term: 6/7500, \$100.00 Per Rep | Class: D | Tier: UPTO100  
 Insurance Co.: DAC Dealer's Assurance

USE	NAME	DESCRIPTION	COST
No data to display			

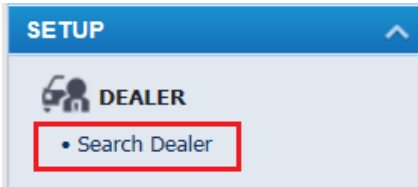
Dealer Cost: \$159.00  
 F&I Markup: \$41.00  
 Retail Cost: \$200.00

## Search Dealer

Search Dealer screen displays basic information about the Dealer. If this information is incorrect, please contact your sales representative.

### Steps to Use:

1. **Open Search Dealer Screen:** The Search Dealer screen can be found in the menu bar on the left of the screen under "Dealer"; clicking on the Search Dealer link will open a new tab in the Dealer Portal main screen.



2. **View Dealer Information:** To view Dealer information, click on the Dealer Number. Dealer information will open a new tab in the Dealer Portal main screen.

ACTION	STATUS	NUMBER	NAME	GROUP NAMES	CITY	STATE	PHONE	MAIN AGENT
	ACTIVE	DEMO7	CBA Demo Dealer 7	CARS; Liberty Shield OEM	MURRYSVILLE	PA	(999) 999-9999	C Berman Associates

Main | Search Dealer | Edit Dealer DEMO7 - CBA Demo Dealer 7

+ Add New

### DEALER PROFILE

Status	Active	Number	DEMO7	Fed Tax ID	
Name *	CBA Demo Dealer 7			Refund Pay Method	
Alt. Name				Claim Pay Method	
Activation Date *	02/06/2020	Termination Date		Contract Pay Method	
Dealer Groups	<a href="#">View/Edit</a>	Association Code		Credit Payment Notify By	None
				Default Inspection Co.	
	<input checked="" type="radio"/> Auto <input type="radio"/> Motorsports				
Rates Profile	Demo7Rates				

EXTERNAL SYSTEM	NUMBER	USER	CAN PULL DEAL	ENABLE DEALS LOAD
			<input type="checkbox"/>	<input type="checkbox"/>

Main

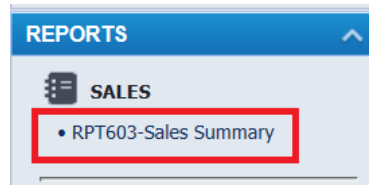
Dealer Location	Billing Address
Country	United States
Address 1 *	123 TEST AVE
Address 2	

## Sales Summary Report

The Sales Summary Report shows Month-to-Date and Year-to-Date sales data for a Dealer's Liberty Shield VSC business. The report displays the Dealer Cost, Dealer Mark-up, Dealer Profit, and monthly Contract Detail for a specified time period.

### Steps to Use:

1. **Open the Sales Summary report:** The Sales Summary Report can be found in the menu bar on the left of the screen under "Sales"; clicking on the RPT603-Sales Summary link will open a new tab in the browser.



2. **Enter Report Parameters:** To view the report, you must first specify the parameters you wish the report to display. All the following fields need to be populated in order for the report to run.
  - a. **Date From:** Start date of the date range you wish the report to reflect; the report periods are specified by month, so the date range of the report will start with the first day of the month selected
  - b. **Date To:** End date of the date range you wish the report to reflect; the report periods are specified by month, so the date range of the report will end with the last day of the month selected
  - c. **F&I Manager:** We do not track which F&I manager sells a given contract, thus production is only tracked at the dealership level – please select "All"
  - d. **Details:** If 'No' is selected, the report will show only summary level data; if 'Yes' is selected, the report will show contract level detail supporting the summary; details can only be pulled if a single month is chosen as the date range
  - e. **Contracts By:** 'Bill Date' is the date we received funds for a contract; 'Entry Date' is the date the contract was entered into the policy administration system; 'Sale Date' is the effective date of the contract. If you choose to search by entry or sale date, the report will bring back all contracts, including ones that are rejected, pending, and voided. For the best results, search by 'Bill Date'

Date From	2017-Dec	Date To	2017-Dec
F&I Manager	ALL	Details	Yes
Contracts By	Bill Date		

3. **Run the Report:** When all parameters are specified, you may run the report by clicking the View Report button

**RPT603 - Sales Summary**

Date From	2017-Dec	Date To	2017-Dec	<input type="button" value="View Report"/>
F&I Manager	ALL	Details	Yes	<input type="button" value="Export CSV"/>
Contracts By	Bill Date			

## Sales Summary Report cont.

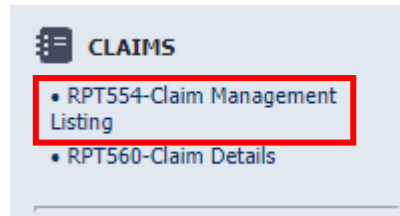
4. **Review Report Summary:** The report has two separate Summary Sections
  - a. **Account Balance / Period Summary:** Shows a summary of sales data for the range specified in the Date From and Date To fields
  - b. **Fiscal Year-to-Date – Total:** Shows a summary of sales data, year-to-date for the fiscal year, through period specified in the Date To field
  - c. **Report Data:** The following data populates based on the report parameters specified.
    - i. **Gross Contract Count:** Number of contracts, not accounting for cancellations
    - ii. **Dealer Net Rate:** Total Dealer cost
    - iii. **Retail:** Total retail price paid by the end customer for the contract
    - iv. **Up Front Profit:** Contract Retail price less Dealer Net Rate
5. **Review Report Detail:** If the report is run with Details (Details can only be pulled if a single month is selected in the Date From and Date To fields), contract detail is populated to support the summary data.
  - a. **Tran Type:** NB is 'New Business' which is any net new contract accepted by Liberty Shield; A is 'Adjustment' which is any rerate that has been applied to a contract (an upgrade of coverage shows a positive number, a downgrade of coverage shows a negative number)
  - b. **Contract Number:** Identification number of the customer's contract
  - c. **VIN:** Vehicle VIN Number covered by the contract
  - d. **New / Used:** Indicates if the covered vehicle is new (N) or used (U)
  - e. **Contract Sale Date:** The contract's effective date
  - f. **Customer Last Name:** Last name(s) of the individual(s) covered on the contract
  - g. **Coverage:** Name and form number of the customer's coverage
  - h. **Term/Deduct:** Term (months) and the claim deductible for the contract
  - i. **Dealer Net Rate:** The dealer cost of the contract
  - j. **Retail:** The retail price the customer paid for the contract

## Claim Management Listing Report

The Claim Management Listing Report is a tool you can use in order to look at your overall claim information. Information such as the status of a claim, what agent is assigned to a specific claim, the coverage on the vehicle, and how much the claim will pay out.

### Steps to Use:

1. **Open the Claim Management Listing Report:** The Claim Management Listing Report can be found in the menu bar on the left of the screen under “Claims”; clicking on the RPT554-Claim Management Listing link will open a new tab in the browser.



2. **Enter Report Parameters:** To view the report, you must first specify the parameters you wish the report to display. All the following fields need to be populated in order for the report to run.
  - a. **Product Type:** The products you are looking to search by. “VSC” is the only option you will be able to filter by to bring back your full list of claims.
  - b. **Servicer:** The name of the shop where the repairs were completed to the vehicle.
  - c. **Dealer:** Dealership which sold the original service contract.
  - d. **Coverage:** What type of contract was sold to the customer, “ALL” will automatically fill in to include all types of coverage with your search.
  - e. **Claim Status:** The point where your customer’s claim is within the claims process. You can sort by approved claims, denied claims, pending claims, etc. Sorting by “ALL” Claim Status is recommended.
  - f. **Report Date By:** The event date you wish to sort your claims by. You can sort by Claim Entry Date, Claim Paid Date, or Claim Service Date. Sorting by Claim Paid Date is recommended.
  - g. **Date From:** Start date of the date range you wish the report to reflect, can be any specific date throughout the year.
  - h. **Date To:** End date of the date range you wish the report to reflect, can be any specific date throughout the year.

Product Type	VSC	Servicer	ALL
Dealer	ALL	Coverage	ALL
Claim Status	ALL	Report Date By	Entry Date
Date From	1/1/2019 12:00:00 AM	Date To	7/15/2019 12:00:00 AM

## Claim Management Listing Report cont.

3. **Run the Report:** When all parameters are specified, you may run the report by clicking the View Report button

**RPT554 - Claim Management Listing**

Product Type	VSC	Servicer	ALL	<b>View Report</b>
Dealer	ALL	Coverage	ALL	Export CSV
Claim Status	ALL	Report Date By	Entry Date	
Date From	1/1/2019 12:00:00 AM	Date To	7/15/2019 12:00:00 AM	

4. **Exporting the Report:** Once the report is pulled, you can export the report into different file types, including Microsoft Word, Microsoft Excel, or a PDF file.

Service: ALL, Coverage: ALL, Report Date By: Entry Date, Date To: 1/31/2019 12:00:00 AM

Find | Next

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

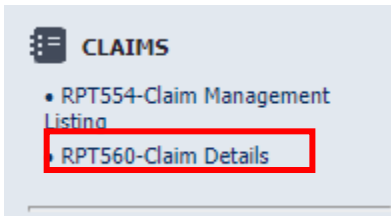
CO Number	Contract Number	Customer First Name	Customer
5	0012255	1024891122019	CONVOY

## Claim Details Report

The Claim Details Report is used in order to see the total dollar amount that is being paid for a claim. The dealer, servicer, and vehicle information are all included in the report as well as service type and parts included within the claim.

### Steps to Use:

1. **Open the Claim Details Report:** The Claim Details Report can be found in the menu bar on the left of the screen under "Claims"; clicking on the RPT560-Claim Details link will open a new tab in the browser.



2. **Enter Report Parameters:** To view the report, you must first specify the parameters you wish the report to display. All the following fields need to be populated in order for the report to run.
  - a. **Dealer Group Type:** Type of dealer filter based on zone or territory. Leaving to "ALL" is recommended when pulling reports.
  - b. **Report Group:** The product type that you want to search by which is either: CBA-LS-CBA -Liberty Shield; FL-CBA-LS-Florida-CBA-Liberty Shield; OK-CBA-LS-Oklahoma-Liberty Shield; or WA-CBA-LS-Washington-CBA-Liberty Shield depending on your state.
  - c. **Dealer/Servicer:** Choose if you want to search by the Dealer the contract was purchased from, the Servicer where the vehicle was repaired, or the Payee we will provide the funds to. Searching by Dealer is recommended.
  - d. **Name or Number:** The Name or ID Number of the Dealer/Servicer/Payee that you want to search by.
  - e. **Entity Selection:** The complete name of the Dealer/Servicer/Payee that you are choosing. (If you sort by a Dealer Number, you MUST select the dealer name in this section.)
  - f. **Report Date By:** The event date you wish to sort your claims by. You can sort by Claim Entry Date, Claim Paid Date, or Claim Service Date. Sorting by Claim Paid Date is recommended.
  - g. **Date From:** Start date of the date range you wish the report to reflect, can be any specific date throughout the year. Cannot be greater than 32 days from the end date.
  - h. **Date To:** End date of the date range you wish the report to reflect, can be any specific date throughout the year. Cannot be greater than 32 days from the start date.

Dealer Group Type	ALL	Report Group	ALL
Dealer/Servicer	Servicer	Name or Number	teds
Entity Selection	<Select a Value>	Report Date By	<Select a Value>
Date From (MM/DD/YYYY)		Date To (MM/DD/YYYY)	

## Claim Details Report cont.

3. **Run the Report:** When all parameters are specified, you may run the report by clicking the View Report button.

### RPT560 - Claim Details Report

Dealer Group Type	ALL	Report Group	ALL	<b>View Report</b>
Dealer/Service	Service	Name or Number	teds	Export CSV
Entity Selection	<Select a Value>	Report Date By	<Select a Value>	
Date From (MM/DD/YYYY)		Date To (MM/DD/YYYY)		

4. **Exporting the Report:** Once the report is pulled, you can export the report into different file types, including Microsoft Word, Microsoft Excel, or a PDF file.

