
Achieving F&I Excellence Online!™

Instruction Guide



THANK YOU

For Choosing Reahard & Associates

Achieving F&I Excellence Online!™ includes training on every aspect of F&I, including needs-based selling, overcoming objections in the F&I office, and the laws and regulations that impact F&I on a daily basis. The best part is, you get online F&I training, in your office, available to you 24/7/365

Need assistance? Contact Reahard & Associates at **1.866.732.4273**.

INSTRUCTION GUIDE

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Manager Reporting

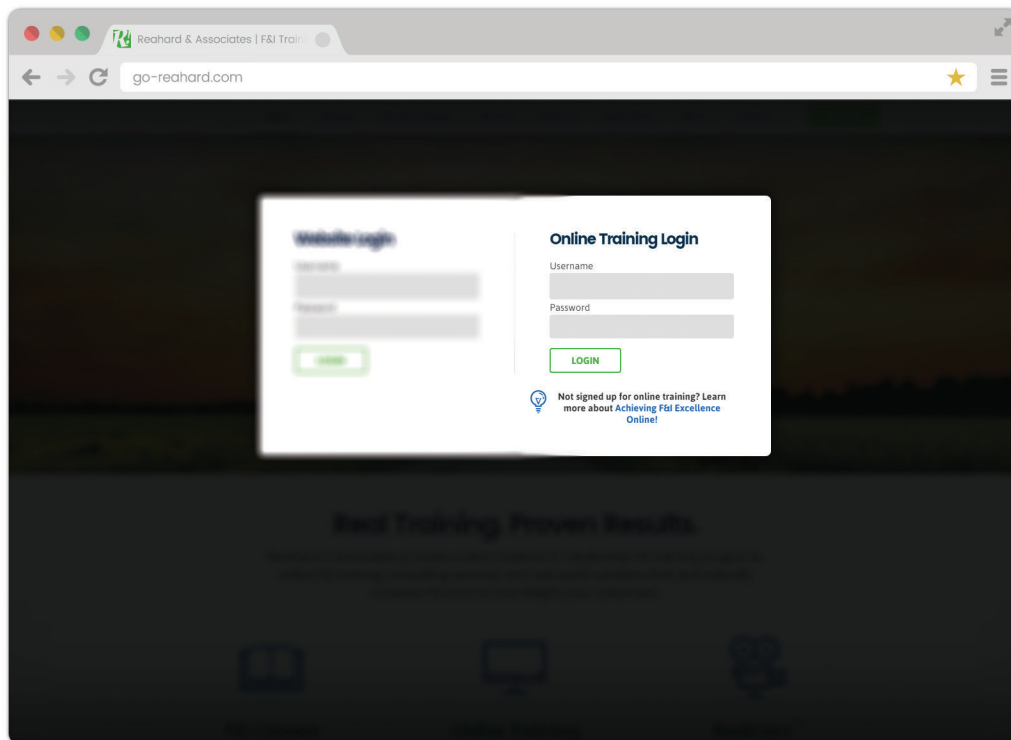
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GETTING STARTED

Logging In

To log in, visit go-reahard.com, and click on the '**LOG IN**' button in the upper right corner. Be sure to enter your login information in the right section, labeled "Online Training Login".

If you do not remember your username or password, please contact Reahard & Associates at **1.866.732.4273**.



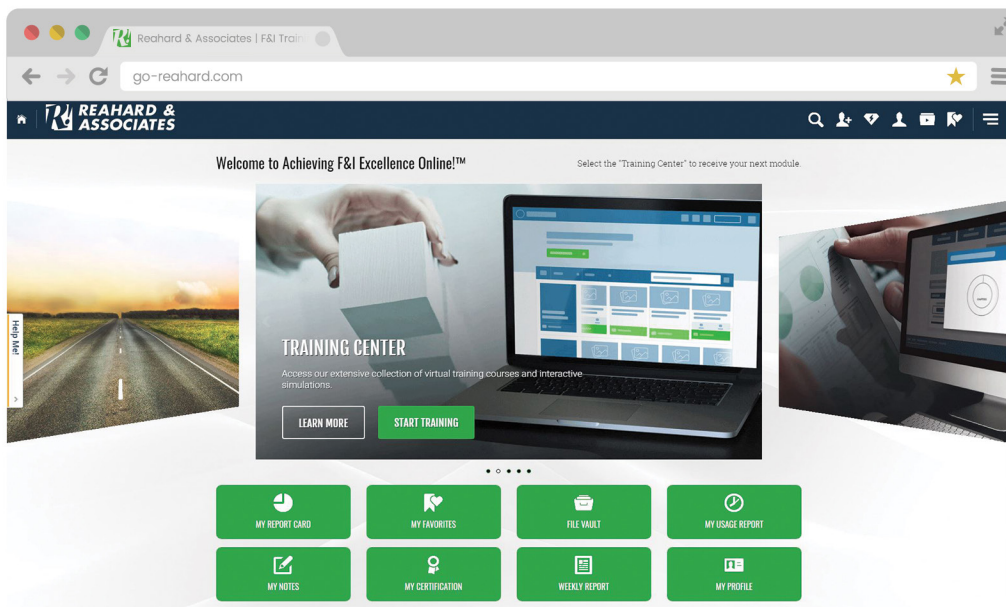
Login screen at go-reahard.com

GETTING STARTED

Main Menu

After successfully logging in, you will be at the main menu. From here you can select '**TRAINING CENTER**' from the carousel below. Selecting '**Start Training**' will take you to the Courses.

You can access the Main Menu at any time by clicking the '**HOME**' button from the top left navigation.



Main Menu of Achieving F&I Excellence Online!

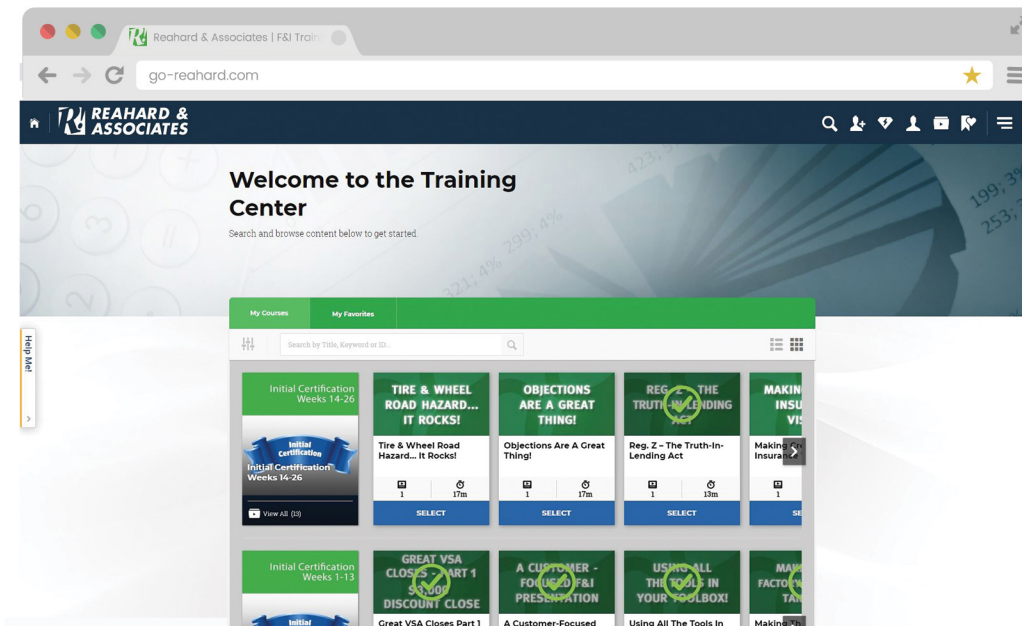
GETTING STARTED

Course Selection

After selecting the Training Center option you will see a list of available courses. Your first course will be '**Online Certification Weeks 1-13**'. New courses will be made available to you as you complete each chapter module within.

Scroll to the right to view the available chapter modules for that course. There are usually 13 chapters to a course. Each new chapter module is made available at the end of every week.

Click on the chapter module you wish to view.

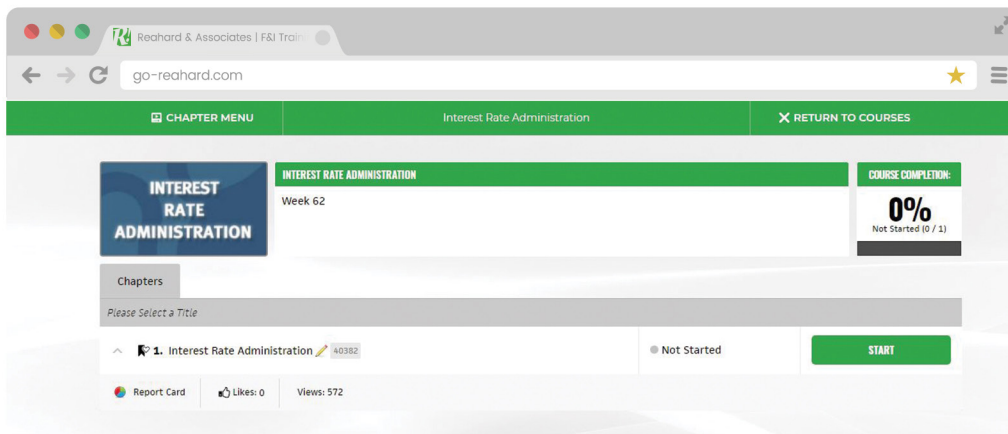


Course & Chapter selection screen

GETTING STARTED

Chapter Selection

Click on the chapter module you wish to view. You will then see your progress thus far for that particular chapter. If the chapter is new, click the **'Start Training'** button to begin. If you have already started, but have not completed the chapter, click the **'Resume Training'** button to continue where you left off.



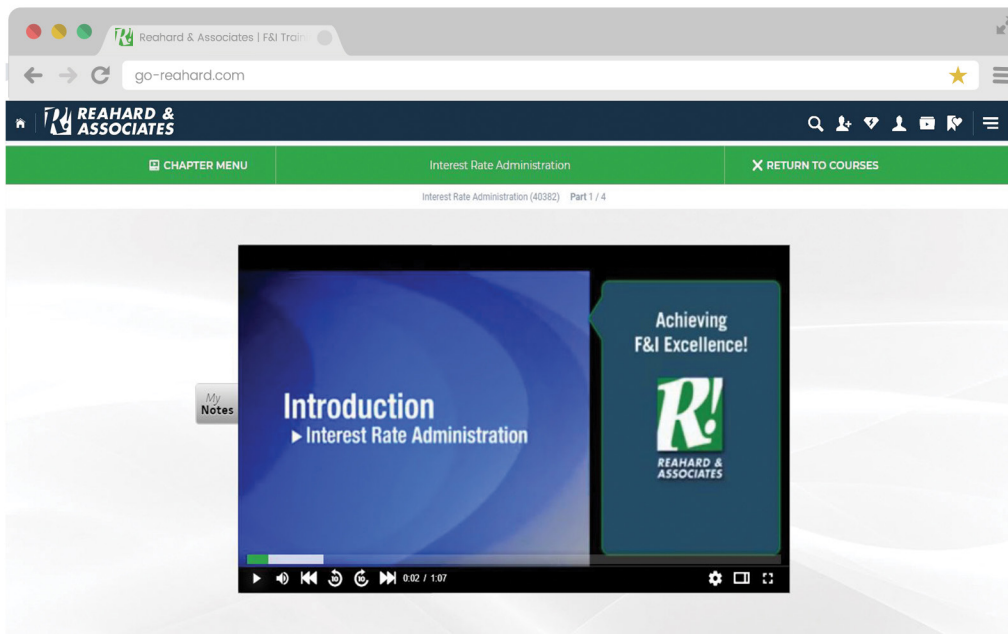
Chapter module selection screen

TRAINING

Training Overview

Each chapter module's training begins with an introduction, followed by a printable action guide, several interactive training portions and finally an evaluation. Each chapter module averages about 30 minutes to complete.

1. **Module Introduction** – Brief overview
2. **Download/Print Module Action Guide** – Printable PDF
3. **Training Sir!**[™] – Video training & demonstration
4. **The Real Deal!**[™] – See the training in action with a customer
5. **Now You Do It!**[™] – Interactive role-play with a virtual customer
6. **Module Summary** – Key concepts to remember
7. **Personal Progress** – Certification test *(with instant results)*
8. **Training Evaluation** – Give course feedback



'Introduction' portion of a chapter module

TRAINING

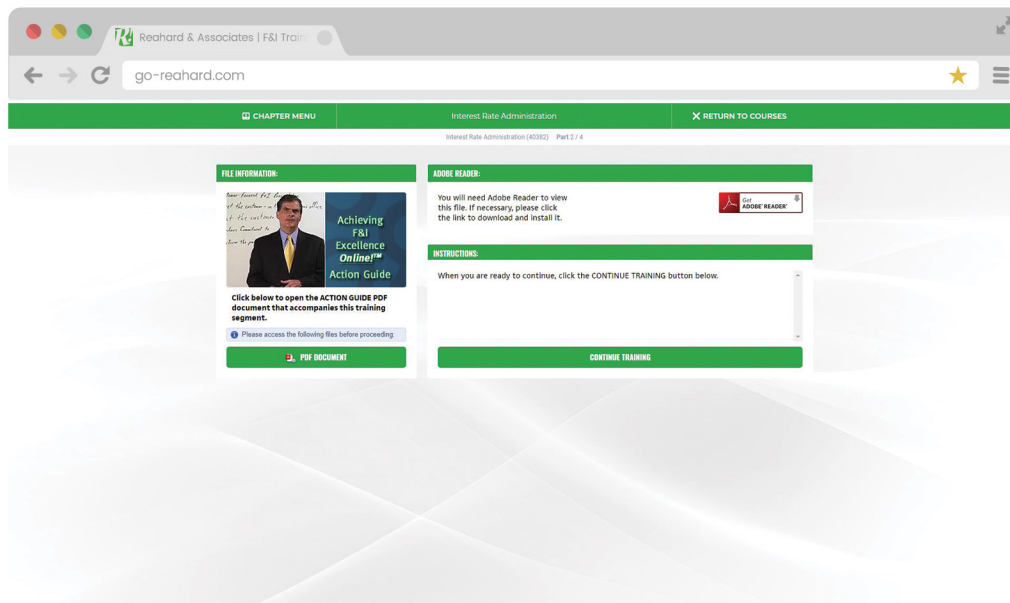
Action Guide

After the introduction of each chapter module, you will have the opportunity to download a PDF action guide. It is recommended that you download and print the action guide, as it will allow you to easily follow along, take notes and keep those notes available for future reference.

After printing your action guide, click the '**Continue Training**' button to begin the next section.



Once you select 'Continue Training' you cannot go back to this point to access the Action Guide.



Printable PDF action Guide download screen

TRAINING

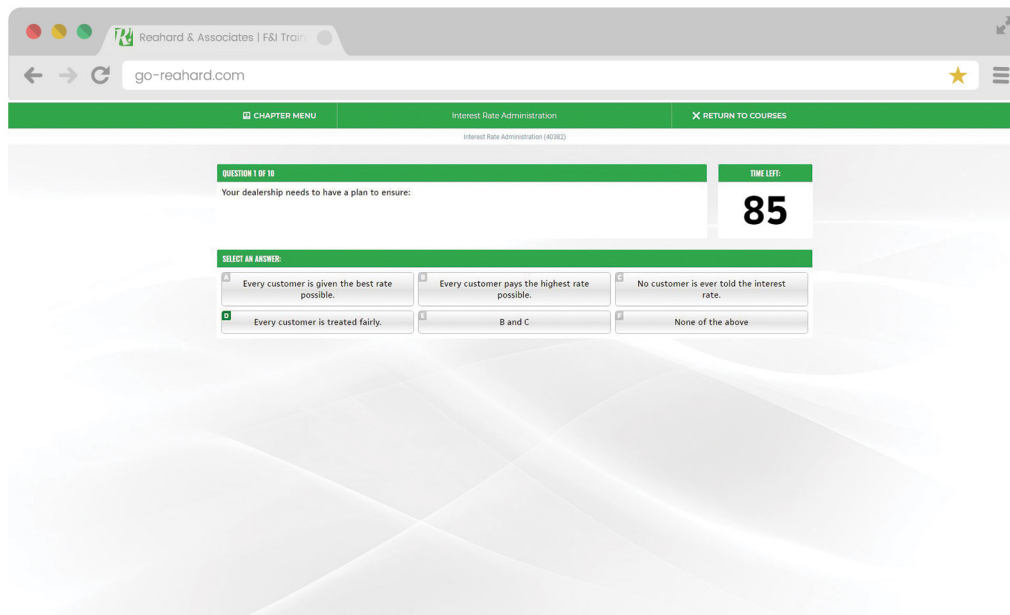
Certification Test

After the training portion of each chapter you will take a multiple choice test covering what you just learned. You will be given 90 seconds for each question. To begin the test click the '**Start**' button.

When you complete the test you will be shown your results immediately.



If you sign out during a test, the question you are on during sign out will be counted as incorrect. If you let your session expire, you will have to retake the entire test.



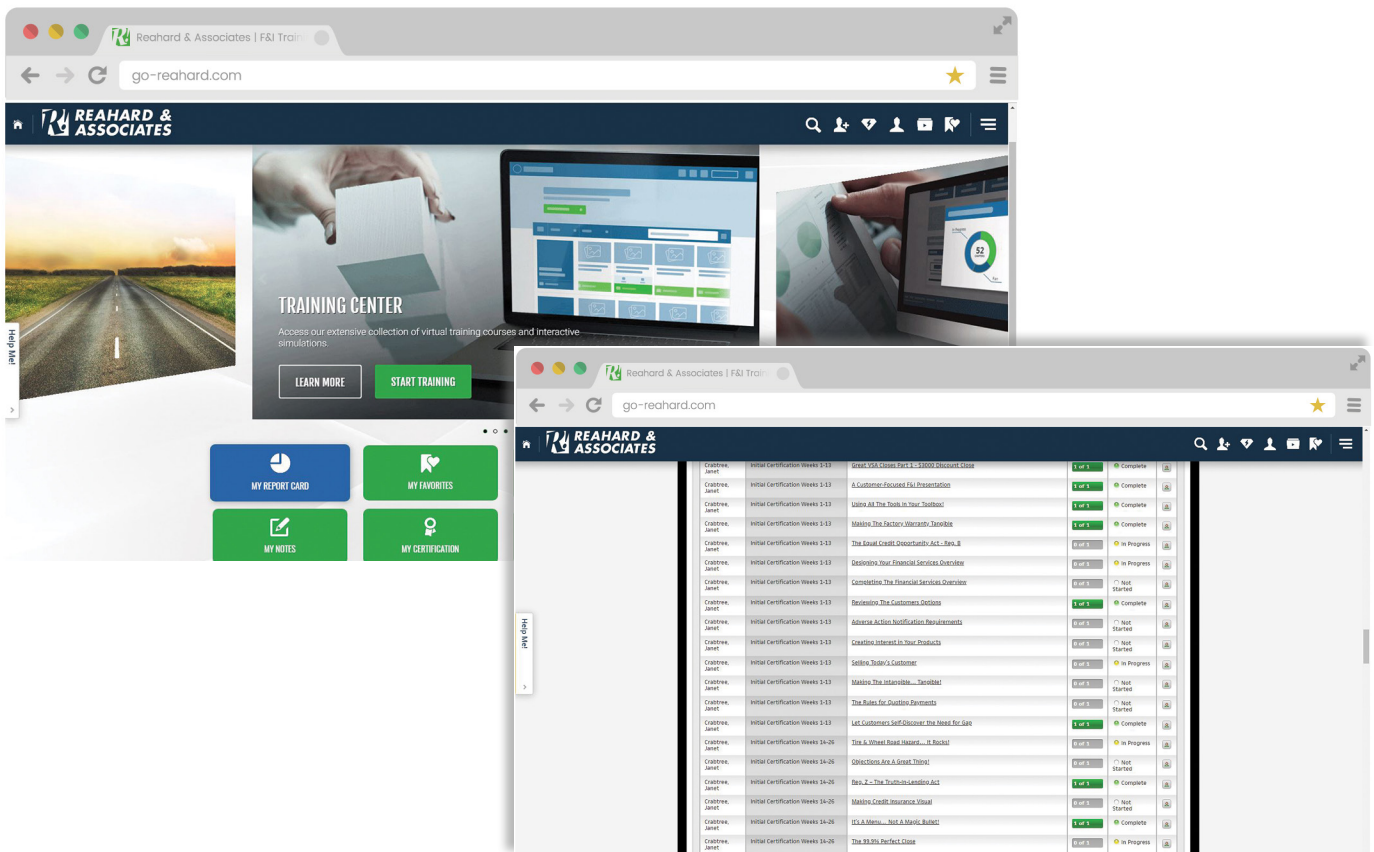
Certification Test screen

REPORT CARD

Report Card Overview

You can access your report card to check the status of your training from the Main Menu. Select **'My Report Card'** from the carousel or from the links below the carousel.

Your report card will show you the status of all the chapter modules that are available to you. You may choose a specific chapter module to see when you started the module, the date of completion and the score of your test, if completed.



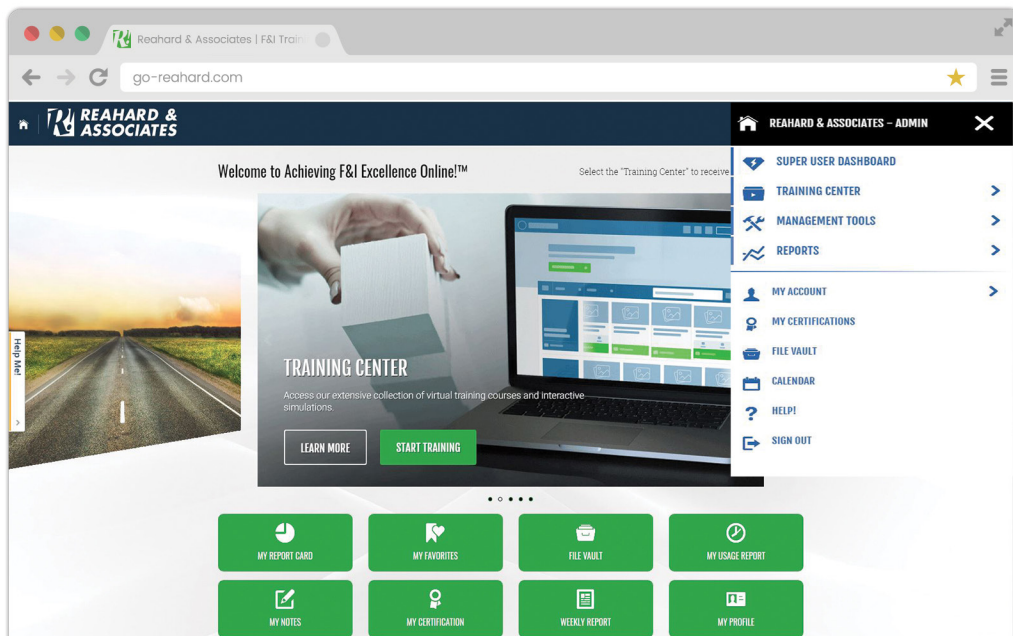
My Report Card screen

MANAGER REPORTING

Reports Overview

As a manager there are many reports that can be accessed for one, or all, of the locations that you may manage. To reveal the tray menu, click the hamburger icon ☰ in the upper right hand corner of the navigation.

Location and reporting options will be located under the "Management or Reporting Tools" section of the drop down menu.



Tray menu open

MANAGER REPORTING

Changing Locations

In some cases it may be necessary for a manager to see reports from a different location. To do this choose the Super User Dashboard option from the dropdown menu.

From the Dashboard click the '**Location Management**' button. If applicable, first select the group that contains the location you want to view, and click the '**Generate Report**' button.

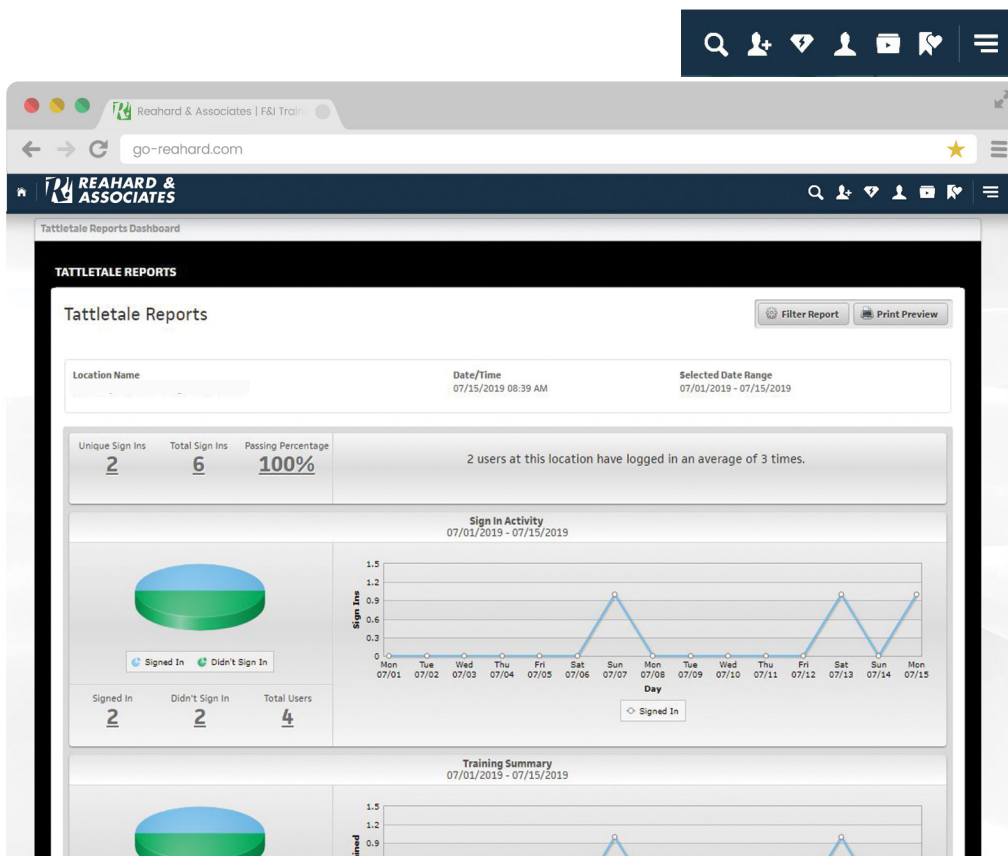
From this screen, select the location you wish to view and proceed as normal to view the various reports for that location.

The image shows two overlapping screenshots of a web application. The background screenshot displays the 'Super User Dashboard' for 'Reahard & Associates - Admin [44230]'. It features a navigation menu with categories: Account (100), Users (200), and Content. The 'Location Management' option is visible under the Account category. The foreground screenshot shows the 'Search & Manage Locations' interface. It includes a 'Super User Info' section with fields for 'Your Primary Location is:' (Reahard & Associates - Admin) and 'Primary Location is in System:' (Reahard & Associates*). Below this is a 'Report Options' section with a 'System' dropdown set to 'ALL SYSTEMS [2]' and a 'Location Status' dropdown set to 'Active'. There are input fields for 'Location Name' and 'Location ID'. A 'Include the following:' section contains a grid of checkboxes for various data points: Location Name, Vendor Unique ID, Location Notes, Location ID, City, Time Zone, Location Status, Resp, Active User Count, Location Billing Notes, State, Template Location, System, Location Type, Max Users, Theme, and Country. A 'Generate Report' button is located at the bottom of the form.

MANAGER REPORTING

Tattletale Report

The Tattletale Report displays multiple summaries of activity – sign in activity, training summary and training activity. To access the Tattletale Report, choose the option from the "Report tools" section of the dropdown menu.















Tattletale Report screen

MANAGER REPORTING

Tattletale Report Detail

Each area of the report can be expanded to view additional details by selecting either the pie chart or the numbers listed below each respective chart.

User	Category	Course	Chapter	Date	Score	Result	
	Initial Certification Weeks 40-52	Establishing The Need For Credit Insurance	Establishing The Need For Credit Insurance	07/13/2019 5:21AM	80%	Passed	 
	Initial Certification Weeks 40-52	Vehicle Service Agreement Sales Techniques	Vehicle Service Agreement Sales Techniques	07/13/2019 5:41AM	100%	Passed	 
	Initial Certification Weeks 40-52	The Gramm-Leach-Bliley Act & FTC Privacy Rule	The Gramm-Leach-Bliley Act & FTC Privacy Rule	07/13/2019 5:56AM	100%	Passed	 
	Initial Certification Weeks 14-26	Objections Are A Great Thing!	Objections Are A Great Thing!	07/07/2019 1:12PM	90%	Passed	 
	Initial Certification Weeks 14-26	Reg. Z - The Truth-In-Lending Act	Reg. Z - The Truth-In-Lending Act	07/07/2019 2:45PM	90%	Passed	 
	Initial Certification Weeks 14-26	Making Credit Insurance Visual	Making Credit Insurance Visual	07/07/2019 3:17PM	80%	Passed	 

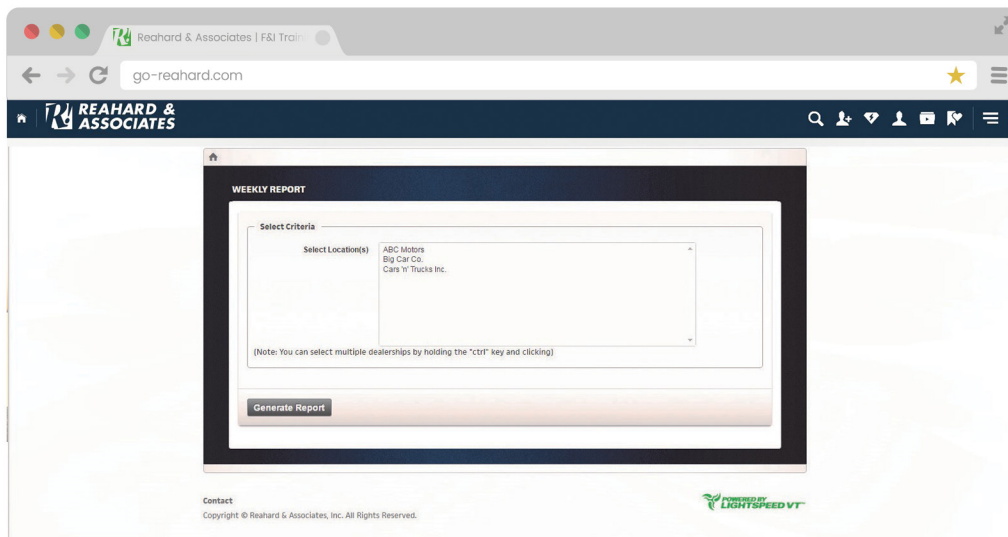
Tattletale Report Detail screen

MANAGER REPORTING

Weekly Report

The Weekly Report displays multiple summaries of activity for each F&I manager in a particular location or locations. To access the Weekly Report, click the '**Weekly Report**' button from the main menu.

You may select one or multiple locations and then click the '**Generate Report**' button to see the report.



Weekly Report screen

MANAGER REPORTING

Weekly Report Detail

The Weekly Report provides a snapshot of F&I Managers progress (*on target, ahead of target or behind*) from their start date through the date the report is generated.

WEEKLY REPORT

Locations: 3 Locations Selected

Legend: 2+ Behind, 2 Behind, 1 Behind, On Target

User	Mod Avail	# Weeks Access	Mod Comp	Mod Behind	Last Login	Comments	Dir/Bolout Date	Hire Date
	8	7	8	-1	07/15/2019	Online manual mailed 12/09/09.	06/03/2019	06/03/2019
	8	7	7	0	07/11/2019		06/03/2019	06/03/2019
	8	7	3	4	07/15/2019		06/03/2019	06/03/2019
	12	11	12	-1	05/01/2019	Online manual delivered by Rick 6/21/19.	05/06/2019	05/02/2019
	12	11	12	-1	07/15/2019	Online manual delivered by Rick 6/21/19.	05/06/2019	05/01/2019
	12	11	11	0	07/12/2019		05/06/2019	05/01/2019
	12	11	0	11	05/01/2019		05/06/2019	05/01/2019
	12	11	7	4	07/10/2019		05/06/2019	05/06/2019
	25	40	27	13	07/15/2019	Online Training Binder - 9.27.18	02/01/2019	10/15/2018
	25	25	12	13	06/06/2019		02/01/2019	01/28/2019
	25	30	27	3	07/15/2019	Online Training Binder - 3.28.19	02/01/2019	12/24/2018
	25	27	13	14	05/28/2019	Online Training Binder - 5.28.19	02/01/2019	03/14/2019

12 entries

Weekly Report screen



**REAHARD &
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