



# Key Express SPIFFs Manual

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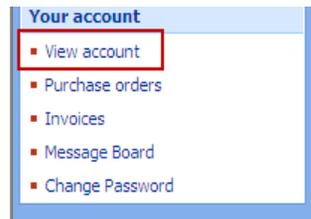
**Keystone RV Company**

# **Section 1: SPIFFs Process**



## How to Create a New Sales Person

To add a new sales person to your dealership location, an administrator will click on "View Account".



Click on "Add Sales Person"

### Dealer sales person

[Add sales person](#)

Cust	Name	Title	Phone	E-mail	Web Login
1067	<a href="#">mkw2 name2 changed</a>		1112223333	<a href="#">ee@here.com</a>	Y7081
1067	<a href="#">Sales Person (Non grouped) test 2</a>	Sales Rep	574-535-1449	<a href="#">Test@keystonerv.coma</a>	Y7083
1067	<a href="#">Test Sales Person Grouped</a>	Accounts Receivable	574-535-2100	<a href="#">test@keystonerv.com</a>	Y7084

Record the "User Name" and "Temporary Password" the system generates for the new Sales Person and fill in all contact information. **Note: All User names require the Extension @kxd.ext (For Example: Y7254@kxd.ext)** Passwords are case sensitive.

#### Add dealer sales person

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**Dealer**

Account Number

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**Sales person**

User name

Name

Title

Phone

Extension

Fax

E-mail

Temporary Password

---

**Dealer Security**

Sales person

Dealer

---

**Group Security**

Sales person

Dealer



Next, select the Security for the user. For a single location, use "Dealer Security", if the user needs access to multiple dealership locations, use "Group Security".

- **Dealer Security** – User can only access the dealership they are assigned to.
- **Group Security** – User can access all dealerships in the Web Group.

The system will allow security in one or the other, not both. If you need rights to claim both types of SPIFFs, two log-ins will be required.

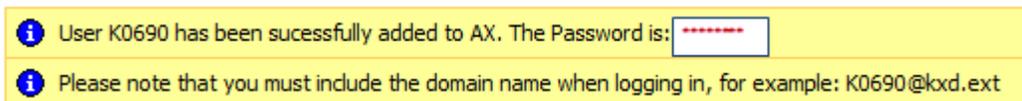
- **Sales person** – Select if claiming sales SPIFFs to be paid directly to the Sales Representative.
- **Dealer** – Select if claiming sales SPIFFs to be paid to the dealership.

The screenshot shows a form with two main sections: "Dealer Security" and "Group Security". Each section has two checkboxes: "Sales person" and "Dealer". In the "Dealer Security" section, both checkboxes are checked. In the "Group Security" section, both checkboxes are unchecked.

**Dealer  
Only  
SPIFFs**

All dealerships will need at least one log-in with "Sales person" security as only those IDs are available to pull into registrations. For dealers that claim "Dealer" SPIFFs only, please add a log-in under the Company Name and give it a "Sales person" security. The dealership name will then show in the drop-down for the registration and allow registration completion.

Next, click the **OK** button at the bottom of the screen and receive a notification bar that the user has been set up.



**Special Note:**

Sales person must log in and complete a secure information section before SPIFFs can be paid to them directly. New SPIFF User IDs, for Salesperson **AND** Dealer type, **require** Keystone personnel validation. Please wait for the next business day for the ID to be validated to claim SPIFFs (excluding weekends and holidays). Your SPIFF user ID will not be able to claim any new programs until it has been reviewed.



## Logging In for the First Time for a SPIFF Account

### Dealer SPIFF Account

Users with dealer security upon log-in will be taken directly to the message board where you can select from the Navigation Bar. Contact your Keystone RV Sales Representative if any changes/updates are needed.

### Sales Person SPIFF Account

A user with Sales person security upon log in will be **required** to set up a profile and enter their secure information. Please fill in all information making sure that you enter your Tax ID number in the proper format for your country. See screen shot below.

Note: This information will be used by Keystone to issue payment of your SPIFFs so please verify its accuracy.

**Please confirm your identity**

Address	Contact info
Street name: <input type="text"/>	Name: <input type="text" value="John Doe"/>
City: <input type="text"/>	SSN/Tax payer Id: <input type="text"/>
State: <input type="text" value="..."/>	Verify SSN/Taxpayer Id: <input type="text"/>
Country/region: <input type="text" value="..."/>	
ZIP/postal Code: <input type="text" value="..."/>	

The SSN/Taxpayer Id format should be specified (US = XXX-XX-XXXX, CA = XXX-XXX-XXX)

Next, click on the **Change now** button and receive notification that your information has been updated.

 Sales person updated



#### **Special Note:**

Changes to a SPIFF User ID Name or Address **require** Keystone personnel validation. Please wait for the next business day for the update to take place (excluding weekends and holidays). Your SPIFF user ID will not be able to claim any new programs until it has been reviewed.



## How to Update Your Contact Information

From the Navigation Bar, select **Edit Contact Info**.

### Dealer Sales Persons

- All SPIFFs
- My SPIFF's
- **Edit contact info**
- Edit name or address

Your current contact information will be shown. Edit any field, then click **Change Now** and receive notification that your information has been updated.

**Edit contact info**

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**Contact info**

Phone:

Extension:

Fax:

E-mail:

 Sales person updated

## **Message Board**

High priority messages will be highlighted in red.

Date	Message	Product Lines	Documents
------	---------	---------------	-----------

There are no messages at this time

[Archives](#)



## How to Update Your Name or Address

From the Navigation Bar, select **Edit Name or Address**.

### Dealer Sales Persons

- All SPIFFs
- My SPIFF's
- Edit contact info
- **Edit name or address**

Your current contact information will be shown. Edit any field, then click **Change Now** and receive notification that your information has been updated.

Note: For security purposes, you will need to enter your Social Security number or Tax ID number to validate your changes.

**Update name or address**

<b>Address</b>	<b>Contact info</b>
Street name: <input type="text" value="123 Test Street"/>	Name: <input style="border: 1px solid red;" type="text" value="Sales Person (Non grouped) test 2"/>
City: <input type="text" value="Waukegan"/>	
State: <input type="text" value="IL"/> ...	
Country/region: <input type="text" value="US"/> ...	
ZIP/postal Code: <input type="text" value="60085"/> ...	
Enter your SSN/Taxpayer Id for validation: <input type="text"/>	
The SSN/Taxpayer Id format should be specified (US = XXX-XX-XXXX, CA = XXX-XXX-XXX)	
<input style="border: 1px solid red;" type="button" value="Change now"/>	

**Sales person updated**

**Message Board**

High priority messages will be highlighted in red.

Date	Message	Product Lines	Documents
There are no messages at this time			

[Archives](#)



### **Special Note:**

Changes to a SPIFF User ID Name or Address **require** Keystone personnel validation. Please wait for the next business day for the update to take place (excluding weekends and holidays). Your SPIFF user ID will not be able to claim any new programs until it has been reviewed.



## How to Register a Unit

From the Navigation Bar, select **Warranty Registration**.



Enter the full VIN number or just the eight digit serial number.

VIN or serial number:

Or

Choose from the list of unregistered units and scroll using the arrows at the top of the page.

Then, click **register now**.

VIN	Serial Number	Model Year	Description
<a href="#">4YDT304226B067662</a>	6B067662	2006	<a href="#">register now</a>
<a href="#">4YDT297236B067768</a>	6B067768	2006	<a href="#">register now</a>
<a href="#">4YDF289226B068964</a>	6B068964	2006	<a href="#">register now</a>
<a href="#">4YDF295236D519397</a>	6D519397	2006	<a href="#">register now</a>

The selling dealer information will default.

Enter the buyer's information. Red asterisks indicate a mandatory field.

**Registration**

Purchaser (first, MI, last)    \*

Secondary (first, MI, last)

Street name:  \*

City:  \*

State:  \*

Postal (Zip) code:  \*

Country:  \*

Telephone:  \*

E-mail:

Retail purchase date:



Next, from the drop down, select the Sales person who sold the unit. This action is required to complete the Warranty Registration process. If the sales person is not available in the table, refer to your administrator to have the correct sales person set up. The salesperson SPIFF number will fill in the name field.

**Salesperson information**

Name:  ... \*

Then, select **Next** and complete the **Acknowledgment** box. Note: a message will display indicating any errors or required fields missing.

**Acknowledgment**

As an authorized dealer representative, I certify that our dealership will keep the signature of this retail purchaser on file and supply it to Keystone RV Company upon request.

After registration is complete, you have the option to view/print the warranty registration in a PDF form.



## How to Change a Sales Person on a Warranty Registration

From the Navigation Bar, select **Edit Warranty Sales Person**. This function must be performed by a user with security to enter warranty registrations.



Search using the full VIN or the 8 digit serial number or by using the arrow buttons to scroll through the grid.



Select the number in blue in the **Dealer Salesperson** column for that VIN.





The screen will display the current sales person information. To change, click the **Look up** to open the sales person table and select the new sales person. Next, **Save** and receive notification that your information has been updated.

Change Sales Person Warranty Register

VIN: 4YDF3282514055652  
Serial Number: 14055652  
Dealer salesperson: SP00000012  
Name: 1ssss  
Address: 2

**Salesperson information**

Name: Test Sales Person Grouped

Lookup Page - Windows Internet Explorer

Dealer	Name	Phone	Street name	ZIP/postal Code	City	County	State	Country/region
1067	<a href="#">mkw2 name2 changed</a>	1112223333	test	000000	Graefenhausen		ON	CA
1067	<a href="#">Sales Person (Non grouped) test 2</a>	574-535-1449	123 Test Street West	60085	Waukegan	Lake	IL	US
1067	<a href="#">Test Sales Person Grouped</a>	574-535-2100	123456	46526	Goshen	Elkhart	in	US
1067	<a href="#">Test Dealer Spiff Non Grouped</a>	574-535-2100	9 West Washington	60607	Chicago	COOK	IL	US
1067	<a href="#">Test Dealer Spiff Grouped</a>	574-535-2100	1510 W Union St	46767	Ligonier		in	US
1067	<a href="#">Mikes Test</a>	6106204571	123 Any Street	46527	Goshen	ELKHART	IN	US
1067	<a href="#">12312312313123</a>	123123123						
1067	<a href="#">2</a>	2						
1067	<a href="#">1ssss</a>	2						

Update complete



## How to Submit a SPIFF

Note: SPIFFs can be paid to a sales person or dealer but must be submitted within 30 days of warranty registration.

Select **All SPIFFs** from the Navigation Bar.

### Dealer Sales Persons

- All SPIFFs
- My SPIFF's
- Edit contact info
- Edit name or address

This table contains all SPIFFs that have been created for your dealership. Select **Status** to sort SPIFFs by status or use the **Search** functionality to find a VIN, Item number or Program ID.

#### All SPIFFs

Refine by: [All](#) | [Status](#)  
[Approved \(11\)](#) | [Cancelled \(1\)](#) | [Paid \(1\)](#) | [Submitted \(4\)](#) | [Pending payment \(9\)](#)

Search

Program Id	VIN	Serial Number	Item number	Program amount	Program Start Date	Program End Date	Status	Customer account
PR-000603	<a href="#">4YDF34323DA740094</a>	DA740094	HM343RL13	200.00	10/23/2012	12/1/2012	Submitted	1067
PR-000603	<a href="#">4YDF34326DA740090</a>	DA740090	HM343RL13	200.00	10/23/2012	12/1/2012	Submitted	1067
PR-000604	<a href="#">4YDF28S23D2500842</a>	D2500842	CG28SGS13	50.00	10/24/2012	12/1/2012	Submitted	1067
PR-000604	<a href="#">4YDF32728D2500869</a>	D2500869	CG327RES13	50.00	10/24/2012	12/1/2012	Submitted	1067
PR-000608	<a href="#">4YDF36222D4700262</a>	D4700262	MO3625RE13	100.00	10/10/2012	10/15/2012	Approved	1067

To submit an approved SPIFF, click on the VIN number in blue.

Program Id	VIN	Serial Number	Item number	Amount	Program Start Date	Program End Date	Status	Customer account
PR-000603	<a href="#">4YDF34323DA740094</a>	DA740094	HM343RL13	200.00	10/23/2012	12/1/2012	Submitted	1067
PR-000603	<a href="#">4YDF34326DA740090</a>	DA740090	HM343RL13	200.00	10/23/2012	12/1/2012	Submitted	1067
PR-000604	<a href="#">4YDT28R22DC500785</a>	DC500785	CG28RBSWE13	50.00	10/24/2012	12/1/2012	Cancelled	1067
PR-000604	<a href="#">4YDF28S23D2500842</a>	D2500842	CG28SGS13	50.00	10/24/2012	12/1/2012	Submitted	1067
PR-000604	<a href="#">4YDF32728D2500869</a>	D2500869	CG327RES13	50.00	10/24/2012	12/1/2012	Submitted	1067
PR-000608	<a href="#">4YDF36222D4700262</a>	D4700262	MO3625RE13	100.00	10/10/2012	10/15/2012	Approved	1067
PR-000609	<a href="#">4YDF24225D3100705</a>	D3100705	SG242FWRLSSR13	100.00	10/25/2012	12/1/2012	Approved	1067



This will display the SPIFF Program assigned by Keystone Sales. If accurate, select **Next**. (If the program is not accurate, please contact your Keystone Sales Representative.)

**Submit SPIFF**

[View](#) > [Submit](#)

Program Id:	PR-000631
VIN:	4YDT23625CN830107
Item number:	EN236LFSWE12
Status:	Approved
Amount:	200.00
Program Start Date:	10/12/2012
Program End Date:	12/1/2012

Next, verify all SPIFF sales person information is correct and check **I confirm that the information above is correct**. Then click the **Finish** to submit the SPIFF and receive confirmation the submission is complete.

**Submit SPIFF**

[View](#) > [Submit](#)

Program Id:	PR-000631
VIN:	4YDT23625CN830107
Item number:	EN236LFSWE12
Status:	Approved
Amount:	200.00
Program Start Date:	10/12/2012
Program End Date:	12/1/2012

**Sales person**

Name:	Test Sales Person (Non grouped)
Street name:	123 Test Street
City:	Waukegan
County:	Lake
State:	IL
Country/region:	US

I confirm that the information above is correct:

SPIFF submission complete



**Special Note:**  
SPIFFs must be claimed within 30 days of the retail sale date entered on the registration.



## Error Messages

Here are some of the following errors that you could receive. If you believe you received any of these in error please contact your Keystone Sales Representative.

! The warranty registration is not completed

Complete the warranty registration and re-submit.

! The warranty registration is submitted by another sales person

A different Sales person was assigned when the warranty registration was submitted.

! The retail sales date is outside the start and end date of the SPIFF

This VIN was not sold during the SPIFF Program's date range.

! You have exceeded the number of days to submit your Incentive Claim

The incentive was not submitted within the number of days allotted after the retail registration was submitted.



## What is the status of my Submitted SPIFF

Select **My SPIFF's** from the **Navigation Bar**.

### Dealer Sales Persons

- All SPIFFs
- **My SPIFF's**
- Edit contact info
- Edit name or address

This table shows the status all SPIFFs you have claimed. Select **Status** to sort SPIFFs by status or use the **Search** functionality to find a VIN, Item number or Program ID.

My SPIFFs

Refine by: [All](#) | [Status](#)  
[Paid \(1\)](#) | [Submitted \(4\)](#) | [Pending payment \(9\)](#)

Program Id	VIN	Serial Number	Item number	Program amount	Program Start Date	Program End Date	Status	Check	Check date	Check Amount	Customer account
PR-000603	4YDF34323DA740094	DA740094	HM343RL13	200.00	10/23/2012	12/1/2012	Submitted			0.00	1067
PR-000603	4YDF34326DA740090	DA740090	HM343RL13	200.00	10/23/2012	12/1/2012	Submitted			0.00	1067
PR-000604	4YDF28523D2500842	D2500842	CG285GS13	50.00	10/24/2012	12/1/2012	Submitted			0.00	1067
PR-000604	4YDF32728D2500869	D2500869	CG327RES13	50.00	10/24/2012	12/1/2012	Submitted			0.00	1067
PR-000611	4YDF33826DA740142	DA740142	HM338D813	100.00	10/25/2012	10/25/2012	Pending payment			0.00	1067

You can view that status or any information on a specific SPIFF from this screen.