

# My GM Rewards

## View & Transact Service Integration

### User Guide

#### Overview of My GM Rewards

*My GM Rewards* is a loyalty program launched by General Motors in April 2018 to provide an integrated and enhanced rewards experience for GM customers. It includes earning and redeeming points on various purchases related to the GM family, such as services, parts, accessories, OnStar services, and vehicle purchases. This program has grown to include nearly 9.5 million members and 3,900 participating GM dealers nationwide.

The Auto/Mate *My GM Rewards* integrated functionality includes **View** and **Transact** processes. These functionalities can be accessed during the following Service processes:

- **Service Estimates:** View estimated service costs and apply available *My GM Rewards* points the customer can redeem.
- **Repair Orders (ROs):** View the customer's information, including account details and redeemable points balance.
- **Service Cashiering:** Redeem the intended amount from the customer's available points balance towards the RO invoice customer-pay total.

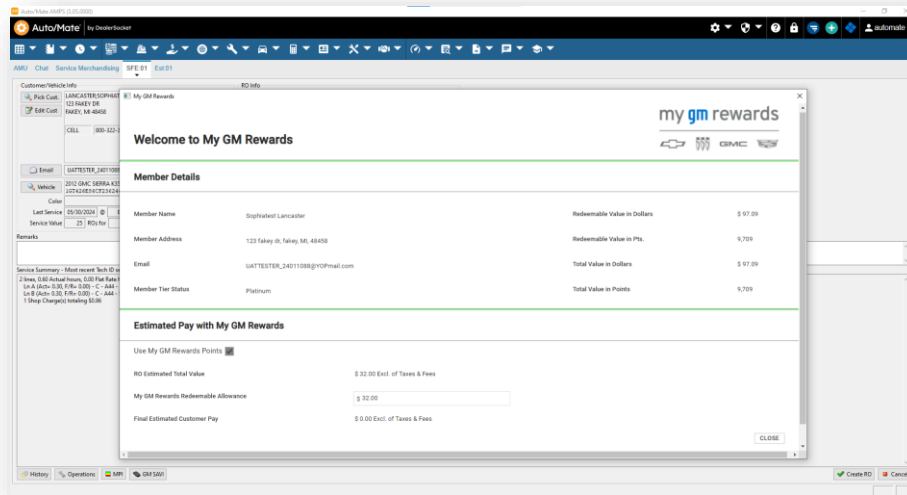
#### View Process

The *My GM Rewards* View integration provides users a seamless workflow to view a customer's *My GM Rewards* account status and available reward points that can be applied to a Service transaction.

The View Functionality can be accessed from:

- Service Estimates
- Service Program 1 – Create a New Repair Order
- Service Program 2 – Appointments
- Service Program 3 – Add a Line/Invoice a Repair Order

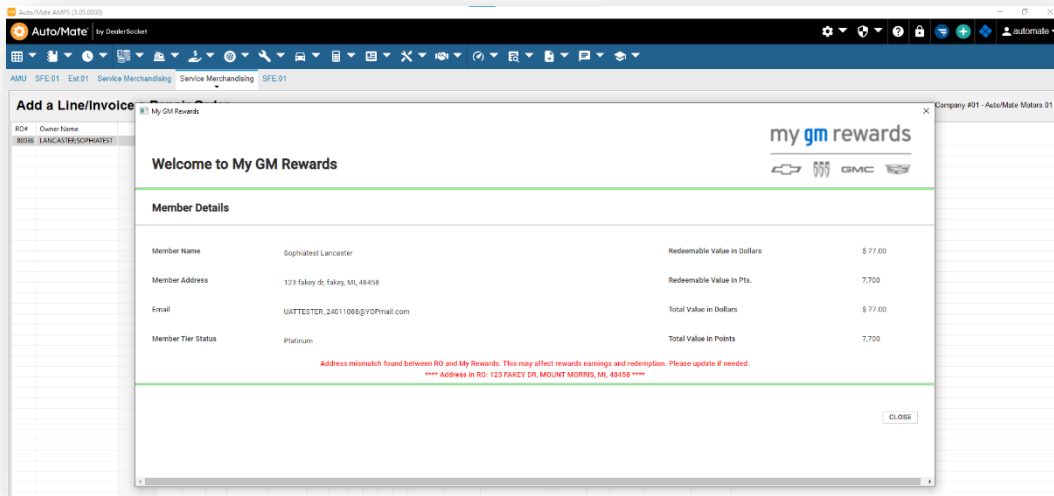
**View for Active My GM Rewards Accounts** – Screen with **GREEN** border displaying the customer's My GM Rewards active account info and redeemable value in points and dollars.



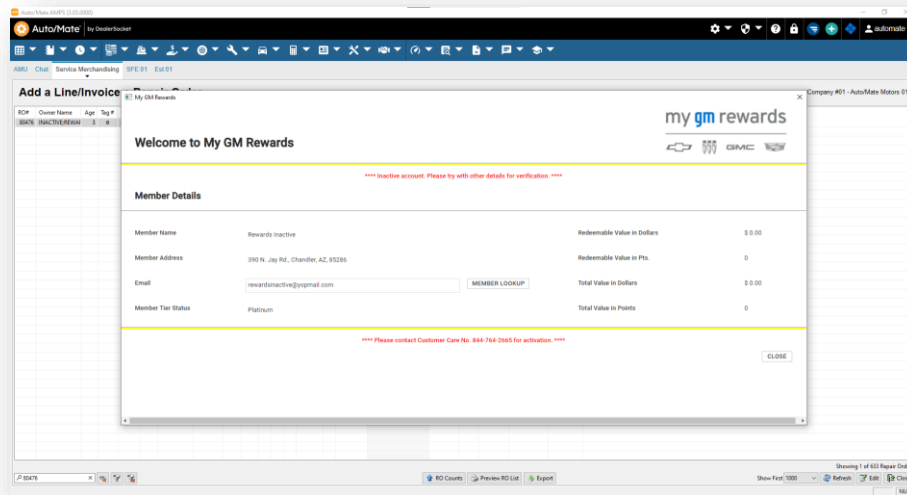
From the above screenshot, under the “Estimated Pay with My GM Rewards” section, the user can view the following information:

- **Use My GM Rewards Points (checkbox):** This checkbox is provided to apply the available My GM Rewards points and display the final estimates customer-pay amount.
- **RO Estimated Total Value:** This is the total value of the Service transaction (excluding taxes and fees) against which the customer can apply My GM Rewards points to.
- **My GM Rewards Redeemable Allowance:** This value is calculated by default; however, the user can modify the amount if desired. The criteria for the default value are as follows:
  - *If the RO Value is less than the redeemable allowance:* The DMS considers the RO value as the default value, and the user can redeem a value up to the maximum RO value. For example, if the redeemable allowance is \$100.00 and the RO value is \$70.00, then the DMS will display \$70.00 as the default value.
  - *If the RO Value exceeds the redeemable allowance:* The DMS considers the redeemable allowance as the default value, and the user can redeem a value up to the maximum redeemable allowance. For example, if the redeemable allowance is \$100.00 and the RO value is \$120.00, then the system will display \$100.00 as the default value.
- **Final Estimated Customer Pay:** This is the transaction total the customer will pay after deducting the My GM Reward points from the RO value. This does not include taxes and fees.

*Note: The integration verifies the customer's My GM Rewards account by comparing the Member Name and Email. If any mismatched are found, they will be displayed on the screen. It is suggested that the mismatch between the DMS information and the My GM Rewards account information be corrected so the customer can continue to earn and redeem reward points.*



**View for Inactive My GM Rewards Accounts** – Screen with **YELLOW** border displaying the customer's My GM Rewards inactive account info. An inactive account refers to an account that is not currently being used or is dormant.

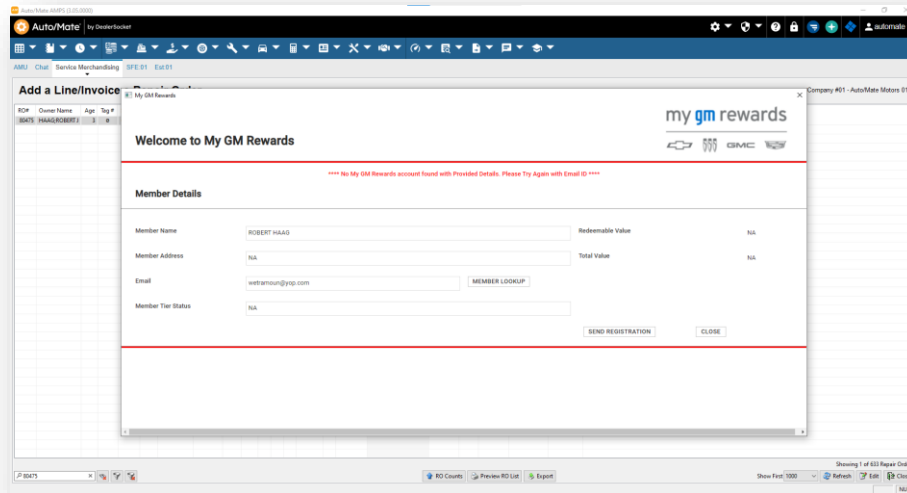


The user has two options in this scenario:

- **Search for an active account with email:** Users can enter an alternate email address in the "Email" field and select "Member Lookup" to search for a potential active My GM Rewards account for the same customer.
- **Contact Customer Care:** Users can contact GM Loyalty Customer Care at 844-764-2665 to reactive the customer's inactive My GM Rewards account.

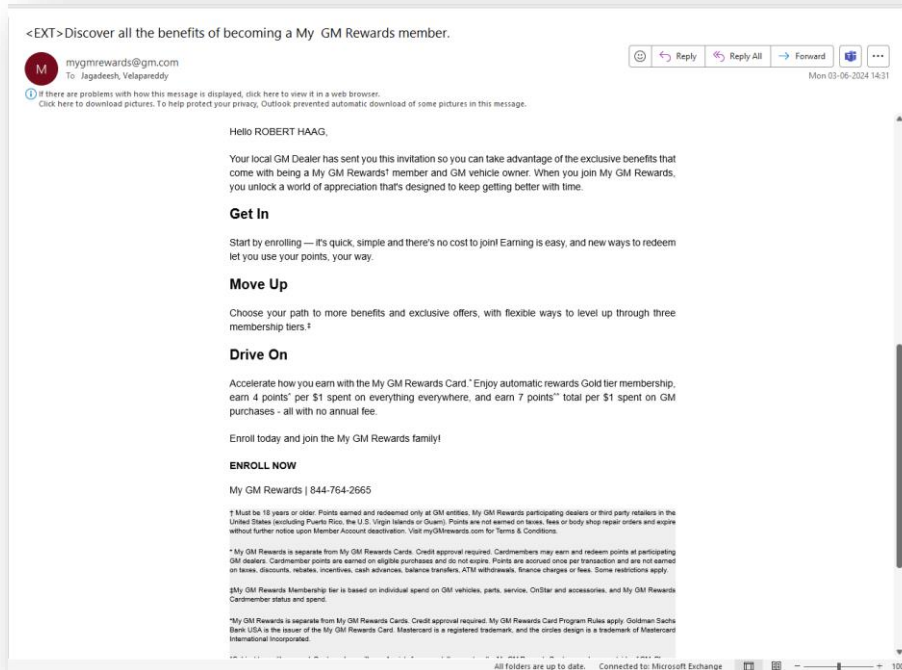
**Note:** After adding the secondary email and clicking on the "Member Lookup" button, the system will check whether an account is found with the provided email address. If the account is found successfully, the user can proceed with the workflow outlined under the "View for Active My GM Rewards Member".

**View for No My GM Rewards Account Found** – Screen with **RED** Border indicating no matching My GM Rewards account based on the customer information in the DMS.



The user has two options in this scenario:

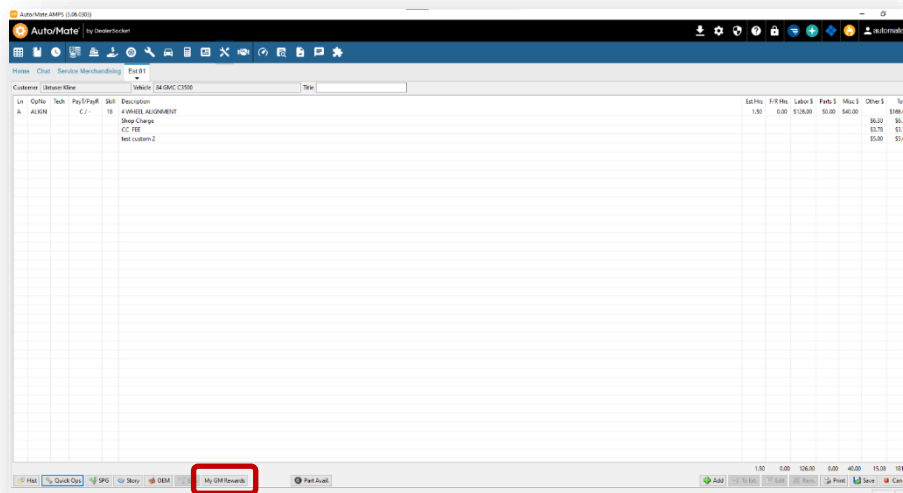
- **Search for an active account with email:** Users can enter an alternate email address in the "Email" field and select "Member Lookup" to search for a potential active My GM Rewards account for the same customer.
- **Soft Registration:** Utilize the "Email" field to enter an email address and add the "Member Name". Adding the "Member Name" will enable the "Send Registration" button. Selecting this will prompt an email to the customer containing the steps to register with *My GM Rewards*.



## Service Estimates View Integration

The Service Estimates module allows users to generate a document outlining the estimated cost of service, parts, and accessories for a customer's vehicle. With the *My GM Rewards* View integration, an active member's available reward points can be applied to the Service Estimate to show the reduced out-of-pocket expense.

After selecting a customer, vehicle, and needed services to a Service Estimate, select the "My GM Rewards" button to view the customer's account status and awards balance:



**Adding Points to Estimate:** The user can select the “Use My GM Rewards Points” checkbox, view and/or edit the “My GM Rewards Redeemable Allowance” points field and click the "PROCEED" button to add the desired amount of points towards the service estimate.

The screenshot shows the 'My GM Rewards' section in the AutoMate interface. The 'Use My GM Rewards Points' checkbox is checked. The 'My GM Rewards Redeemable Allowance' field is set to \$100.00. The 'PROCEED' button is highlighted.

Member Details	Member Name	Member Address	Member Email	Member Tier Status	Redeemable Value in Dollars	Redeemable Value in Points	Total Value in Dollars	Total Value in Points
Member Name	UATUSER KLINE	300 N. Triangle Rd., Chandler, AZ 85226	uatrewards44@gmail.com	Platinum	\$ 239.00	23,900	\$ 239.00	23,900

Estimated Pay with My GM Rewards	RD Estimated Total Value	My GM Rewards Redeemable Allowance	Final Estimated Customer Pay
Use My GM Rewards Points	\$ 120.00 Excl. of Taxes & Fees	\$ 100.00	\$ 0.00 Excl. of Taxes & Fees

When selecting “Print” the user can now see the *My GM Rewards* discount applied to the Service Estimate as well as the reduced customer-pay amount.

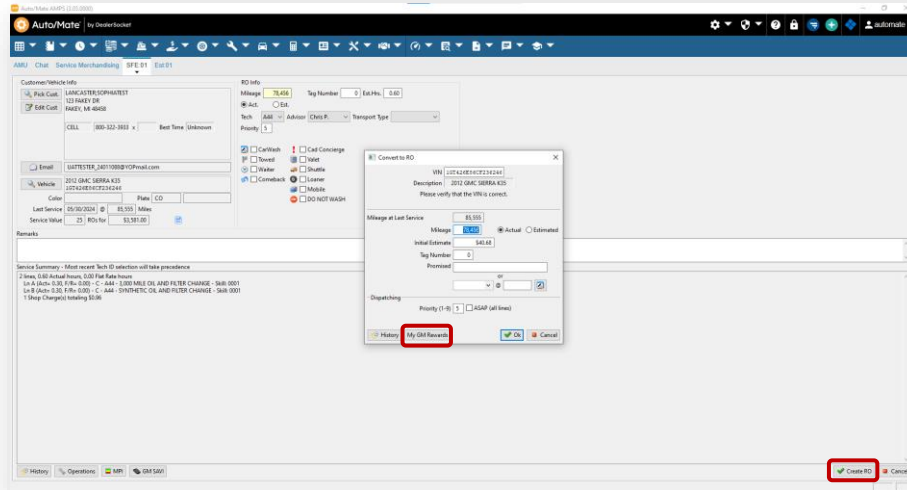
The screenshot shows the 'Service Estimate' window in the AutoMate interface. The 'Grand Total' is \$181.08, 'My GM Rewards' is -\$100.00, and 'Customer Pay' is \$81.08. The 'Print' button is highlighted.

Estimate Total Summary	Total Hours	Total Labor	Total Parts	Total Misc	Shop Charge	InternalShop	CCC FEE	Test custom 2	Grand Total	My GM Rewards	Customer Pay
Line Total	1.50	\$120.00	\$0.00	\$40.00	\$6.30	\$0.00	\$3.78	\$0.00	\$181.08	-\$100.00	\$81.08

## Service Program 1 – Create a New Repair Order & Service Program 2 – Appointments View Integration

A new button labeled “My GM Rewards” has been added to the “Convert to RO” window when

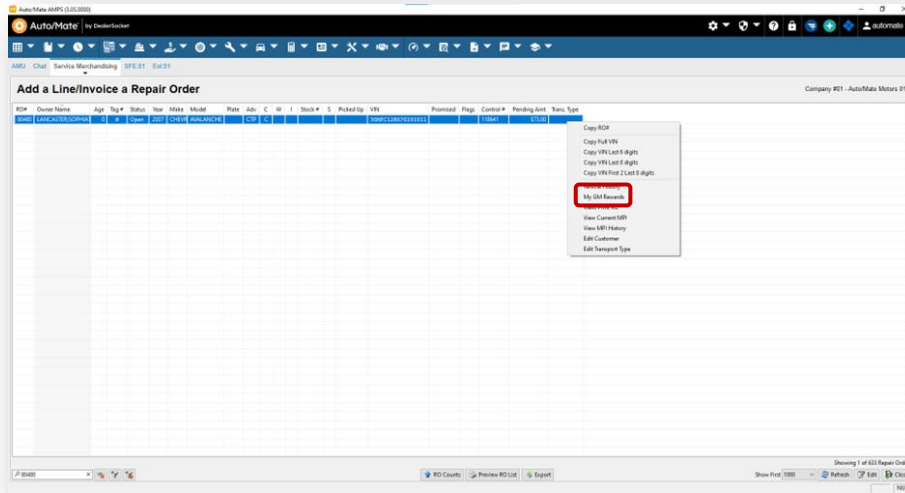
creating a repair order in Service Program. Selecting this button will launch the *My GM Rewards* View functionality, searching for and displaying the customers *My GM Rewards* account information so the user can consult with the customer on potential available points to apply to the transaction should they desire.



## Service Program 3 – Add a Line/Invoice a Repair Order View Integration

The *My GM Rewards* View integration has been added to Service Program 3 to assist users with accessing the customer's *My GM Rewards* account information and available points. This allows users to inform the customer of potential discounts on the service utilizing available points.

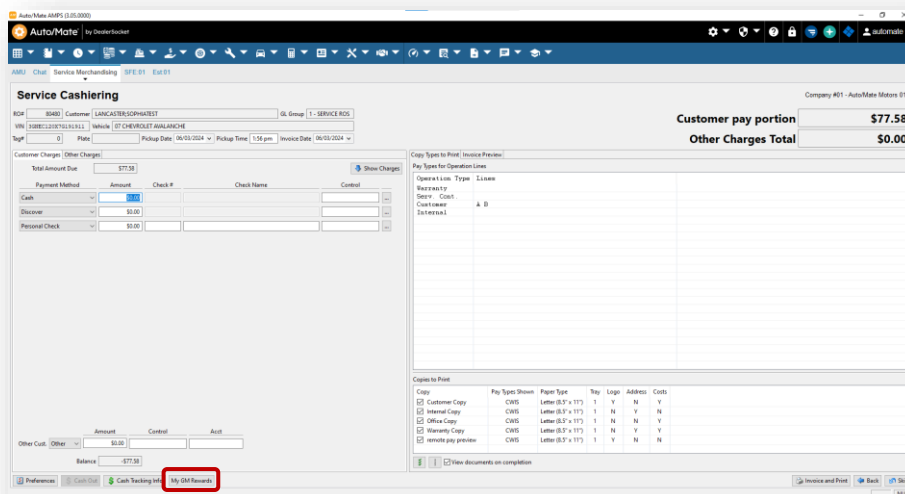
From the repair order list, users can right-click on a repair order, and then select "My GM Rewards" to launch the view functionality:



## Transact Process

The *My GM Rewards* Transact integration provides users a seamless workflow to view and redeem a customer's *My GM Rewards* points that can be applied to a Service transaction during the cashiering process.

The Transact functionality can be accessed from the Service Cashiering screen by selecting the new button labelled "My GM Rewards".



The following steps must be followed to redeem available *My GM Rewards* points:

- **Redemption Type:** This is a default value as currently, only Service redemption is available. In the future, additional redemption types of Parts and Accessories will be



integrated as GM makes these redemption types available for integration.

- **Fetch Details:** Clicking on “Fetch Details” will provide the latest details of the maximum allowable redemption amount available and enable the user to modify the value of the current redemption within the stipulated limit.

The screenshot shows the 'My GM Rewards' interface within the Auto/Mate system. The interface is divided into several sections:

- Service Cashiering:** Includes fields for ROR, Customer, VIN, Tag, and Plate. It also has a 'Payment Method' dropdown with options like Cash, Discover, and Personal Check.
- Welcome to My GM Rewards:** A header section with the 'my gm rewards' logo.
- Member Details:** A table showing member information:
 

Member Name	Sophomore Lancaster	Redeemable Value in Dollars	\$ 51.00
Member Address	123 Fakey Dr, Fakey, MI, 48408	Redeemable Value in Pts.	5,100
Email	UATTESTER_24011088@YIPmail.com	Total Value in Dollars	\$ 51.00
Member Tier Status	Platinum	Total Value in Points	5,100
- My GM Redemption:** A section with a 'Redemption Type' dropdown set to 'Service' and a 'FETCH DETAILS' button highlighted with a red box.
- Redemption Details:** A table showing redemption information:
 

Max Redem. Amount	\$ 32.00	Available Points / Dollars for Redemption	
Current Redemption	\$	Total Points / Dollars	
Last 4 Digits of Card			

On the right side, there is a summary of the transaction with a total of \$77.58 and a balance of \$0.00.

After selecting “Fetch Details”, the following steps must be completed to continue with the My GM Rewards redemption:

- **Current Redemption:** This field will default to the maximum value of rewards available to use on the Service transaction. This amount can be edited by the user should the customer like to redeem a lesser value.
- **Last 4 Digits of Card:** The user must enter the last 4-digits of the My GM Rewards Member Number or the last 4 digits of the customer’s My GM Rewards Credit Card.
- **Redeem Button:** After defining the redemption value for the current transaction and adding the valid 4-digit member number/card number, the system will enable the “Redeem” button at the bottom of the screen. Clicking this button will add the redeemed amount as one of the payment methods under the cashiering screen (un-editable), and the redeemed amount will be deducted from the total Customer Pay or Total Amount Due.

**Welcome to My GM Rewards**

**Member Details**

Member Name	Sophisticated Lancaster	Redeemable Value in Dollars	\$ 51.00
Member Address	123 Fakey Dr, Fakey, MI 48408	Redeemable Value in Pts	5,100
Email	UATTESTER_2401108@Gmail.com	Total Value in Dollars	\$ 51.00
Member Tier Status	Platinum	Total Value in Points	5,100

**My GM Redemption**

Redemption Type: Service FETCH DETAILS

**Redemption Details**

Max Redeem Amount	\$ 32.00	Available Points / Dollars for Redemption	5100 Pts / \$ 51.00
Current Redemption	\$ 32.00	Total Points / Dollars	5100 Pts / \$ 51.00
Last 4 Digits of Card	8041		

REDEEM CLOSE

**Note:** Providing an invalid Member Number/Card Number will cancel the transaction, and an error message will be displayed to the customer.

**Service Cashing**

Customer: LANCASTER, SOPHISTICATED | OL Group: 1 - SERVICE BOS

Vehicle: 07 CHEVROLET SILVERADO

Company 401 - AutoMate Motors 01

**Customer pay portion** **\$77.58**

**Other Charges Total** **\$0.00**

**Total Amount Due** **\$77.58**

**Payment Method** **Amount** **Check #** **Check Name** **Control**

Cash	\$45.18			
Discover	\$0.00			
My GM Rewards - Service	\$32.00			

**Other Cust. Other** **Amount** **Control** **Auto**

**Balance** **\$0.00**

**Error Message:** The card number is incorrect. Please give correct card number for redemption.

**Copy Types to Print / Invoice Preview:**

Copy	Pay Type	Form Type	Page	Logo	Address	Costs
<input checked="" type="checkbox"/> Customer Copy	CWS	Letter (8.5" x 11")	1	Y	N	Y
<input checked="" type="checkbox"/> Internal Copy	CWS	Letter (8.5" x 11")	1	N	Y	N
<input checked="" type="checkbox"/> Office Copy	CWS	Letter (8.5" x 11")	1	N	N	Y
<input checked="" type="checkbox"/> Warranty Copy	CWS	Letter (8.5" x 11")	1	N	Y	Y
<input checked="" type="checkbox"/> Receipt Copy	CWS	Letter (8.5" x 11")	1	Y	N	N

After adding the required details and clicking the "Redeem" button, the user will be navigated back to the cashing screen. Clicking "Cancel" will void the transaction, and no points will be redeemed.

**Service Cashing**

Customer: LANCASTER SOPHIA TEST | VIN: 3GBEC120X7G181911 | Year: 2007 | Make: CHEVROLET | Model: AVALANCHE | Pickup Date: 06/03/2024 | Pickup Time: 1:55 pm | Invoice Date: 06/03/2024

**Customer Charges (Other Charges):**

Payment Method	Amount	Check #	Check Name	Control
Cash	\$0.00			
<b>My GM Rewards - Service</b>	<b>\$32.00</b>			

**Total Amount Due:** \$77.58  
**Balance:** \$45.58

**Customer pay portion:** \$77.58  
**Other Charges Total:** \$0.00

In the above screenshot where the Balance Amount is displayed as \$45.58. This indicates that out of the \$77.58 Total Amount Due, the user has entered a payment method of \$32.00 through My GM Rewards. The remaining balance of \$45.58 should be paid using other available payment methods.

**Note:** If the My GM Rewards redemption amount is desired to be edited, the user must click the "My GM Rewards" button and follow the same original process, indicating the new redemption amount before proceeding.

Clicking on the "Cash Out" button will deduct the redeemed dollars from the customer's My GM Rewards account, and subsequently, earnings will be credited to the customer's My GM Rewards account for the spending on the current transaction. The user and customer can see the My GM Rewards redemption value that was applied to the invoice.

**Service Cashing**

Customer: LANCASTER SOPHIA TEST | VIN: 3GBEC120X7G181911 | Year: 2007 | Make: CHEVROLET | Model: AVALANCHE | Pickup Date: 06/03/2024 | Pickup Time: 1:55 pm | Invoice Date: 06/03/2024

**Customer Charges (Other Charges):**

Payment Method	Amount	Check #	Check Name	Control
Cash	\$0.00			
<b>My GM Rewards - Service</b>	<b>\$32.00</b>			

**Total Amount Due:** \$77.58  
**Balance:** \$45.58

**Customer pay portion:** \$77.58  
**Other Charges Total:** \$0.00

**Invoice Details:**

VEHICLE ID	VEHICLE DESCRIPTION	DATE IN	DATE OUT	INVOICE NO
3GNEC120X7G181911	2007 CHEVROLET AVALANCHE	06/03/24 04:13	06/03/24	80480

**Non-Customer Totals**

Charge Description	Amount	Cost
Serv Tax One	\$0.42	
Labor	\$32.00	
Customer Shop	\$3.30	
Est. charge 1	\$0.96	
Misc Chg	\$40.00	\$20.00
Misc Chg	\$1.00	
<b>Total Amount Due</b>	<b>\$77.58</b>	

**Customer Totals**

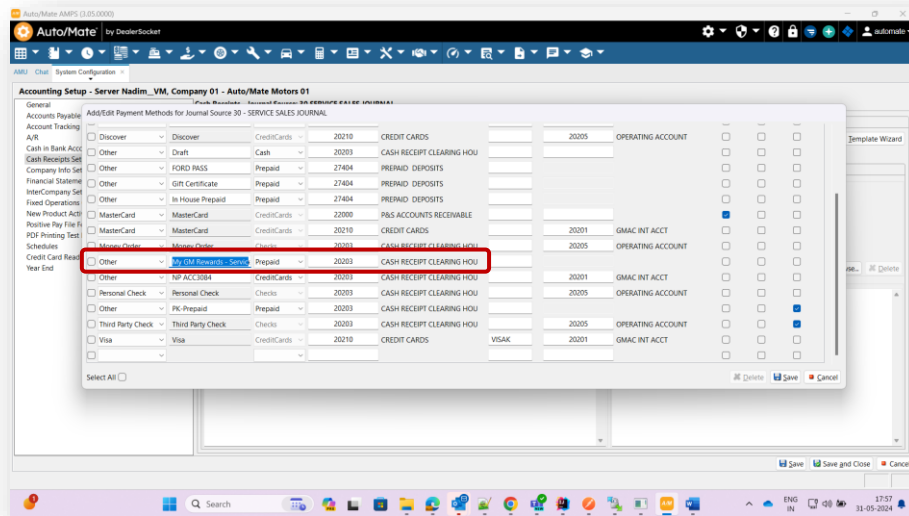
Charge Description	Amount	Cost
Visa	\$45.58	
<b>My GM Rewards - Service</b>	<b>\$32.00</b>	

## Accounting Setups

There are setups that must be completed in Accounting to accurately process the *My GM Rewards* redemption on the repair order invoice.

Navigate to “Accounting Setup” under System Configuration, and then “Cash Receipts Setup”. Under the “Receipt Setup” tab, select the Journal Source for your Service Sales Journal, and then select the “Payment Method” button. In the Payment Method setup screen, enter the following details:

- **Payment Method:** Others
- **Description:** My GM Rewards-Service
- **Category:** Prepaid & Account
- **Acct #:** Enter the G/L account of your choosing



## Participating vs. Non-Participating Dealers

Not all GM dealers are considered “Participating” *My GM Rewards* dealers. The availability of using the Auto/Mate *My GM Rewards* integration is based on the dealership status.

**View Integration:** Users will be able to view a customer’s *My GM Rewards* account status, redeemable value, and total value regardless of the dealer’s participation in the *My GM Rewards* program.

**Transact Integration:** Redemption transactions for regular *My GM Rewards* members are only for participating dealers. However, for GM 2.0 cardholders, redemptions may occur at any dealership regardless of participation status.

**Service Cashiering**

Customer: LANCASIA  
VIN: 1FT7W1C6180004343  
Tag#: 0  
Plate: BL0504

Customer Charges: Other Charges

Total Amount Due: \$41.45  
Payment Method: Cash  
Balance: \$41.45

**My GM Rewards**

Welcome to My GM Rewards

**Member Details**

Member Name	Sophiatel Lancaster	Redeemable Value in Dollars	\$ 0.00
Member Address	123 Foley St, Foley, MS, 38420	Redeemable Value in Pts	0
Email	UATTESTER_2401108@icloud.com	Total Value in Dollars	\$ 0.00
Member Tier Status	Platinum	Total Value in Points	0

\*\*\* Dealer Not Eligible - This dealer is not authorized to earn or redeem points for this customer \*\*\*

Other Cuts: Other \$0.00

Print Documents on completion