

## Idea Room/ Service Pad Quick Guide

### Barn Management Group

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- Login into your 3-D Design room to create the metal building/ Carport.  
**\*If this is your first time creating an RTO agreement with BMG you can go through these steps and make a “test” order so that you can receive your Service Pad Login\***
- Once the building/carport has been created, go to “Sales Tools” enter
  1. Dealer Security Deposit
  2. Sales Tax %
  3. Click “Order/Buy”
  4. Click “BMG RTO Service Pad”
  5. Enter all Dealer information
    - a) Enter Delivery Location
      - i. Double verify address as is cannot be edited after this step
    - b) Click Next
  6. Enter all Customer information
    - a) Click “Pay Now” to be directed to Service Pad
  7. In Service Pad you will then follow the prompted screens to input all the customer information for the RTO contract as follows:
- **01. Payment:** Select the payment term, sales tax, and if there is a cost reduction.
- **02. Agreement Details:** Security deposit amount, payment date, and amount collected will be entered here. (The amount collected is whatever the customer paid to you at the lot)
- **03. Renter Details:** Enter in all the customer’s information here. DOB, SS number, DL number.
- **04. Co Renter Details:** If there is no co-renter click no. If so, fill out completely.
- **05. References:** Fill out all information. We would rather have references that do not live in the household.
- **06. Agreement:** You can review the contract here and sign with the dealer now or click “Sign Renter Via Email” so the customer will receive the contract digitally to sign or “Skip Renter for now” and sign later.
- **You will be returned to Service Pad Home Screen**
- Please find the customer’s order – go to “Manage Documents” – upload a valid drivers license. If the order is over \$10,000 you will need to upload proof of ownership. Ex. Homeowners Ins. Policy, Deed, or Property Tax Bill.
- **TX TIMER/AG TAX EXEMPT CARDS ARE NOT ACCEPTED. WE GENERALLY DO NOT ACCEPT ANY TAX EXEMPTIONS WITH THE EXCEPTION OF OKLAHOMA.**