



## Software Installation Request Form

Dealership Name : \_\_\_\_\_

Street: \_\_\_\_\_ City: \_\_\_\_\_

State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

General Manager: \_\_\_\_\_ Finance Manager(s): \_\_\_\_\_

Agent Name: \_\_\_\_\_ Agency: \_\_\_\_\_

Agent Phone: \_\_\_\_\_ Agent Email: \_\_\_\_\_

### Product Selection:

**F&I Menu      F&I Tablet      Videos & Customer Questionnaire      Sales Desk      Service Sales Solution**

**Bi-Weekly Payment Plan:** *Save your customers' time & money on their loan. Call CTC for more info (866) 882-3110.*

**Online Reporting:** *For use with F&I Menu only. No additional fee. See next page for set-up.*

**OFAC Compliance Check:** *Unlimited use for an additional \$10.00/month. Separate form to sign.*

**Life & Disability Rates:** *Please include a copy of the rate tables with examples.*

**DMS / Menu Integration:** *For use with F&I Menu only. Separate forms & fees apply.*

### Billing Information:

**Bill to:**                  Dealership                  Agency

**Install Date:** \_\_\_\_/\_\_\_\_/\_\_\_\_      **Invoice Amount:** \$\_\_\_\_\_/month      **# of PCs to Install** \_\_\_\_\_

\*Billing will begin upon the Install Date chosen above. Software usage is not a factor used to determine Invoicing or Billing.

**Billing Name (or same as above):** \_\_\_\_\_

Street: \_\_\_\_\_ City: \_\_\_\_\_

State: \_\_\_\_\_ Zip Code: \_\_\_\_\_ Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

**Authorized Signature:** \_\_\_\_\_ **Date** \_\_\_\_/\_\_\_\_/\_\_\_\_

**FAX (518) 899-4864      PHONE (866) 684-6368**



# Service Sales Solution

## Products

Name	Rate ID	Rate Provider	Program

## Recommended Rates

Select Display amount  
 2 Rates     3 Rates

Display order (Number in the order you wish to display)  
 \_\_\_ Price    \_\_\_ Term    \_\_\_ Mileage    \_\_\_ Deductible

Enter Rate Coverages (Based upon the displays above)


## Markup

Select Markup Option (Select One)

\$ Amount \_\_\_\_\_

Percent \_\_\_\_\_

Allow users to edit Markup amount

## Discount Code

Add Discount Code at Checkout

Code \_\_\_\_\_  \$ Amount     Percent \_\_\_\_\_

Code \_\_\_\_\_  \$ Amount     Percent \_\_\_\_\_

Code \_\_\_\_\_  \$ Amount     Percent \_\_\_\_\_

## Tax Rate

Set Tax Rate \_\_\_\_\_ %

## Payment Plan (Select One)

Provider	Account ID	Account Password
<input type="checkbox"/> SPP		
<input type="checkbox"/> Paylink		
<input type="checkbox"/> SIUPreme		
<input type="checkbox"/> Other _____		

## Quote Information

Customer Reply Information

SMTP Client URL \_\_\_\_\_      Reply To Email \_\_\_\_\_

SMTP Username \_\_\_\_\_      SMTP Password \_\_\_\_\_

Logo Entry (Select One)

Email logo     Download Logo from link: \_\_\_\_\_

What Message? \_\_\_\_\_

\*\*Disclaimer: The above information is required for a quick and easy setup process. Any missing information may result in a delay in setup time frame.



# Service Sales Solution

## Username & Passwords

Please enter the username(MUST be email) and passwords for all employees that you wish to have access to the Service Sales Solution software below.

Email: \_\_\_\_\_

Password: \_\_\_\_\_

Email: \_\_\_\_\_

Password: \_\_\_\_\_

Email: \_\_\_\_\_

Password: \_\_\_\_\_

Email: \_\_\_\_\_

Password: \_\_\_\_\_

Email: \_\_\_\_\_

Password: \_\_\_\_\_

Email: \_\_\_\_\_

Password: \_\_\_\_\_

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Password: \_\_\_\_\_