



AGENCY NAME: \_\_\_\_\_

**Dealership Account Information**

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

DBA: \_\_\_\_\_ FEIN: \_\_\_\_\_

Company Address (for business correspondence): \_\_\_\_\_

Main Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Main Fax: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

Website: \_\_\_\_\_

DMS System: \_\_\_\_\_ Menu System: \_\_\_\_\_

- Choose Applicable:
- E-Contracting
  - Printed Forms
  - DAP

Dealership Contact (Primary)

Name: \_\_\_\_\_ Position: \_\_\_\_\_

Direct Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Cell Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

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

Address (if different from above): \_\_\_\_\_

Dealer Platform Access Level - select one (see definitions below):

- Management Personnel
- Administrative Personnel
- F&I Personnel
- Service Personnel

Dealership Contact (Office)

Name: \_\_\_\_\_ Position: \_\_\_\_\_

Direct Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Cell Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

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

Dealer Platform Access Level - select one (see definitions below):

- Management Personnel
- Administrative Personnel
- F&I Personnel
- Service Personnel

Dealership Contact (Scheduler/COVI Contact)

Name: \_\_\_\_\_ Position: \_\_\_\_\_

Direct Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Cell Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

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

Dealer Platform Access Level - select one (see definitions below):

- Management Personnel
- Administrative Personnel
- F&I Personnel
- Service Personnel



**Additional Dealer Access Portal Logins (Accounting and F&I)**

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

Title: \_\_\_\_\_

Direct Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Cell Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

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

Dealer Platform Access Level - select one (see definitions above):

Management Personnel

Administrative Personnel

F&I Personnel

Service Personnel

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

Title: \_\_\_\_\_

Direct Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Cell Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

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

Dealer Platform Access Level - select one (see definitions above):

Management Personnel

Administrative Personnel

F&I Personnel

Service Personnel

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

Title: \_\_\_\_\_

Direct Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Cell Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

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

Dealer Platform Access Level - select one (see definitions above):

Management Personnel

Administrative Personnel

F&I Personnel

Service Personnel

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

Title: \_\_\_\_\_

Direct Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Cell Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

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

Dealer Platform Access Level - select one (see definitions above):

Management Personnel

Administrative Personnel

F&I Personnel

Service Personnel



Dealership Contact (Marketing/COVI Contact)

Name: \_\_\_\_\_ Position: \_\_\_\_\_

Direct Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Cell Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

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

Dealer Platform Access Level - select one (see definitions below):

Management Personnel

Administrative Personnel

F&I Personnel

Service Personnel

Dealership Contact (Technology/Information)

Name: \_\_\_\_\_ Position: \_\_\_\_\_

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

Dealer Platform Access Level - select one (see definitions below):

Management Personnel

Administrative Personnel

F&I Personnel

Service Personnel

**Dealership Parts and Service Contacts**

Dealership Service Director

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

Direct Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Cell Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

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

Dealer Platform Access Level - select one (see definitions below):

Management Personnel

Administrative Personnel

F&I Personnel

Service Personnel

Dealership Service Manager

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

Direct Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Cell Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

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

Dealer Platform Access Level - select one (see definitions below):

Management Personnel

Administrative Personnel

F&I Personnel

Service Personnel



Dealership Parts Manager

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

Direct Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Cell Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

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

Dealer Platform Access Level - select one (see definitions below):

\_\_\_ Management Personnel

\_\_\_ Administrative Personnel

\_\_\_ F&I Personnel

\_\_\_ Service Personnel

**Definitions:**

- *Management Personnel:* Platform access including all rights listed for the positions below plus rate mark-up and price limit
- *Administrative Personnel:* Platform access to view, void and/or remit contracts, retrieve billing statements and obtain cancellation quotes
- *F&I Personnel:* Platform access to originate, rate and view quotes, print contracts for customer signatures
- *Service Personnel:* Platform access to file pre-paid maintenance claims

**Dealership Service Information**

*Complete this section for: Excess Wear and Tear, Key Fob, Pre-Paid Maintenance, Revolution Bundle, Revolution Key, Revolution Wheel, Tire and Wheel, and VSC*

**Franchise Dealership**

Franchise(s) Represented: \_\_\_\_\_

Manufacturer's Labor Rate: \_\_\_\_\_/Hour **\*Required – manufacturer's labor rate approval letter.**

Average Monthly New Car Sales: \_\_\_\_\_ Average Monthly Used Car Sales: \_\_\_\_\_

Projected New VSC Sales: \_\_\_\_\_ Projected Used VSC Sales: \_\_\_\_\_

VSC Issued As: Administrator Obligor \_\_\_\_\_ Dealer Obligor \_\_\_\_\_

Participating Dealer: \_\_\_ Yes \_\_\_ No Claim Reimbursement Process: CC \_\_\_ Check \_\_\_ ACH \_\_\_

Goodwill Manager: \_\_\_\_\_ Shop Manual Used: \_\_\_\_\_

**Non-Franchise Dealership**

Service Facility: \_\_\_ Yes \_\_\_ No

Retail Labor Rate: \_\_\_\_\_/Hour

Average Monthly New Car Sales: \_\_\_\_\_ Average Monthly Used Car Sales: \_\_\_\_\_

Projected New VSC Sales: \_\_\_\_\_ Projected Used VSC Sales: \_\_\_\_\_

VSC Issued As: Administrator Obligor \_\_\_\_\_ Dealer Obligor \_\_\_\_\_

Participating Dealer: \_\_\_ Yes \_\_\_ No Claim Reimbursement Process: CC \_\_\_ Check \_\_\_ ACH \_\_\_

Goodwill Manager: \_\_\_\_\_ Shop Manual Used: \_\_\_\_\_

***Please mark next to the relevant lenders used by your dealership.***

Honda/Acura	<input type="checkbox"/>
Chrysler/Santander	<input type="checkbox"/>
TFS/MFS	<input type="checkbox"/>
Hyundai/Kia/Genesis	<input type="checkbox"/>
Nissan/Infiniti	<input type="checkbox"/>
VW/Audi	<input type="checkbox"/>
Ally	<input type="checkbox"/>
Ford	<input type="checkbox"/>
Chase	<input type="checkbox"/>
WFDS	<input type="checkbox"/>
Capital One	<input type="checkbox"/>
Exeter	<input type="checkbox"/>
First Investors	<input type="checkbox"/>
GM Financial	<input type="checkbox"/>
Stellantis	<input type="checkbox"/>