

Setup Worksheet: Instructions and Required Documents

Please complete this form using the following steps:

1. Complete ALL sections
2. Sign to confirm information is accurate
3. If you are submitting for **multiple producers** with the same program, please complete **Producer Information** page for each
4. Email completed setup and additional documentation to Century Automotive Service Corporation at apg@centuryservicecorp.com

The following documents are required for all NEW producers. Nothing will be installed until all are received by CASC.

- Current W-9
- All Required Addendums

Request Details

New Producer	Existing Producer with Changes	Dealer-Owned Warranty Company
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DM Name: _____ Today's Date: _____

Divison: _____ DM Email: _____ Effective Date: _____

Producer Information

Additional Producers?	Yes	No	Please add additional Producer Information on next sheet.
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Dealer Group (if applicable): _____

Legal Name: _____

Common Name (dba): _____

Street Address: _____

City, State, Zip: _____

State Dealer License Number: _____

Labor Manual must
include a copy with
new producer setups

All-Data

Mitchell

Factory

Dealer sells Factory Certified Pre-Owned?	Yes	No	Requested Retail Labor Rate ¹	\$	Labor Tax (if applicable)	%	Parts tax	%
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Dealership Personnel	Name	Ext	Email Address
Dealer Principal:			
Office Manager:			
Service Manager:			
F&I Manager:			
Online Portal Contact F&I:			
Online Portal Contact Office:			
Other Name/Title:			
Other Name/Title:			

¹ If the producer has a service center, this information is required.

Producer Information

Dealer Group (if applicable): _____

Legal Name: _____

Common Name (dba): _____

Street Address: _____

City, State, Zip: _____

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Mitchell

Factory

Dealer sells Factory
Certified Pre-Owned?

Yes

No

Requested Retail
Labor Rate¹

\$

Labor Tax
(if applicable)

%

Parts tax %

Dealership Personnel	Name	Ext	Email Address
Dealer Principal:			
Office Manager:			
Service Manager:			
F&I Manager:			
Online Portal Contact F&I:			
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Dealer sells Factory
Certified Pre-Owned?

Yes

No

Requested Retail
Labor Rate¹

\$

Labor Tax
(if applicable)

%

Parts tax %

Dealership Personnel	Name	Ext	Email Address
Dealer Principal:			
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Reinsurance Information

	Platinum Partner?		Reinsured?		Name of RIC	New RIC?	
VSC New/Used	Yes	No	Yes	No		Yes	No
VSC HM	Yes	No	Yes	No		Yes	No
Platinum Shield Elite (formally SAHM)	Yes	No	Yes	No		Yes	No
Platinum Shield	Yes	No	Yes	No		Yes	No
Select Care	Yes	No	Yes	No		Yes	No
Tech	Yes	No	Yes	No		Yes	No
KARR Guard	Yes	No	Yes	No		Yes	No
PDR	Yes	No	Yes	No		Yes	No
Smart Key	Yes	No	Yes	No		Yes	No
Tire & Wheel	Yes	No	Yes	No		Yes	No
Windshield	Yes	No	Yes	No		Yes	No
Maintenance	Yes	No	Yes	No		Yes	No
LWA	Yes	No	Yes	No		Yes	No
Other (explain) _____	Yes	No	Yes	No		Yes	No
Other (explain) _____	Yes	No	Yes	No		Yes	No

Deductible Options

\$0 \$50 \$100 \$200

Disappearing? Yes No

Integration Options & Lender Information

Current Menu System: _____

Current Finance Company(ies):

Ally
BMO Bank
Capital One
Chrysler
Exeter

First Investors
Ford/Lincoln
GM/AmeriCredit
Honda/Acura
Hyundai/Kia

Mazda
Nissan/Infiniti
Santander
Southeast Toyota
Stellantis

Toyota/Lexus
Volkswagen/Audi
Wells Fargo
Other

Please specify: _____

E-Contracting
E-Rating
Online Cancellations²

Notes / Special Instructions

Signatures

District Manager Signature

Date

Divisional VP Signature

Date

(P) 1 (888) 338-0389
www.centuryservicecorp.com
6565 Americas Pkwy. NE, Ste. 1000, Albuquerque, NM 87110



SETUP WORKSHEET

FINALIZED RATES

PRODUCT	Reinsured	Direct	Roadside	APG Commission	Additional Reserves	Internal Dealer Pack	Pack (Over Remit) ³	Gray Area
VSC NEW/USED								
VSC HM								
PLATINUM SHIELD								
PLATINUM SHIELD +								
PLATINUM SHIELD ELITE								
KARR GUARD CHOICE (1 PRODUCT)								
KARR GUARD CHOICE (2 PRODUCTS)								
KARR GUARD CHOICE (3 PRODUCTS)								
KARR GUARD CHOICE (4 PRODUCTS)								
KARR GUARD PLUS								
SMART KEY								
SMART KEY GIVEAWAY								
PAINTLESS DENT REPAIR								
TIRE & WHEEL COSMETIC								
MAINTENANCE - Define _____								
LWA WRAP / WRAP PL								
LWA - Define _____								

NOTES / COMMENTS

Pack Payee: _____

3 If pack commission is over remit, you must include a **Dealer Pack Addendum, W-9 of Payee** for payment, and **Direct Deposit form**. Additionally, an **email address** will be required if the Pack Payee is **not** APG, as this is where reports will be sent.

DISCLAIMER: This is neither a legal document nor a legal opinion. The information in this document should not be relied upon for legal purposes and is only general in nature. Product availability is subject to change based upon changes in state and federal legislation, laws and regulations.

User Role Assignments

	User First Name	User First Name	User Email Address	Store	Back Office	Back Office w/ Online Cancel	E-Rating	E-Contract
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								

PLEASE NOTE: PERMISSIONS CAN BE MODIFIED AS NEEDED ON A USER-BY-USER BASIS. THE ROLES LISTED ABOVE ARE BASIC ROLES.

Role Descriptions

Back Office

Contract Entry via portal from completed paper contract provided by Loan Officer.

Permissions include but are not limited to the following.

User can:

- **Look up** and **view** contracts
- **View** and **create** lienholder
- **View** and **edit** member information link (prior to submitting contract)
- **View** contract billing status (Active, Cancelled, etc)
- **Enter** contract
- **Edit** contract (prior to submission)
- **Open** cancellation quote
- **View** and **submit** remittance
- **View** all quotes
- **View** remit amount

E-Rating

F&I Manager enters vehicle info in quote tab to obtain rates.
(Rates only / No forms printed)

Permissions include but are not limited to the following.

User can:

- **Look up** and **view** contracts
- **View** and **create** lienholder
- **View** and **edit** member information link (prior to submitting contract)
- **Open** cancellation quote
- **View** and **add** quote
- **View** all quotes
- **Edit** retail
- **Discount** retail to remit (but not below remit)
- **View** remit amount

Back Office w/ Online Cancel

Online Cancellation Addendum required

Permissions include same as **Back Office** role with the following addition:

- User can **cancel** contracts (from cancellation quote)

E-Contracting

F&I Manager enters vehicle info in quote tab to obtain rates and print contract form.

Permissions include same as **E-Rating** role with the following addition:

- User can **submit** contract

Submitting a contract will create a PDF copy of the contract.