

## NEW CLIENT INFORMATION FORM

Welcome to TecAssured! Please complete as much of this form as possible and return it to our office promptly by email to [operations@EXPRESSFnl.com](mailto:operations@EXPRESSFnl.com). Don't hesitate to call our office at \_\_\_\_\_ should you have any questions.

### GENERAL CLIENT DETAILS

Business Name:		Business Website URL:	
Business Main Phone:		Business Main Fax:	
Business Address, City, State, Zip:			
<b>MAIN BUSINESS CONTACT PERSON NAME:</b>			Title:
Direct/Mobile Phone:	Time Zone:	Email:	
<b>TECHNICAL CONTACT PERSON NAME:</b>			Title:
Direct/Mobile Phone:	Time Zone:	Email:	
<b>ADDITIONAL CONTACT(S), DETAILS, PREFERENCES, ETC:</b>			
<b>COMPANY NAME FOR INVOICING (if different than above):</b>			
Billing Address, City, State, Zip:			
Billing Contact Person:			
Billing Phone:	Time Zone:	Billing Email:	
Billing Notes:			
<b>JPG or PNG LOGO FILE:</b> Please email to <a href="mailto:operations@tecassured.com">operations@tecassured.com</a>			
<b>PEN INTEGRATION REQUIRED:</b> <input type="checkbox"/> No <input type="checkbox"/> Yes, I have an account <input type="checkbox"/> Yes, I do NOT have an account			
<b>F&amp;I EXPRESS INTEGRATION REQUIRED:</b> <input type="checkbox"/> No <input type="checkbox"/> Yes, I have an account <input type="checkbox"/> Yes, I do NOT have an account			
<b>ADDITIONAL NOTES:</b>			

### INTERNAL USE ONLY

Server Setup by Date:

Database Starting Point:

Additional Notes:

## ADMIN SOFTWARE SETUP DETAILS

<b>LIVE DOMAIN NAME:</b>	<b>TEST DOMAIN NAME:</b>
<i>We can work with a custom domain. Please email <a href="mailto:operations@tecassured.com">operations@tecassured.com</a> to request details and pricing.</i>	
<b>INITIAL SYSTEM TEST USERS (LIST NAMES AND EMAILS):</b>	
<b>INSURABLE / WARRANTIED ITEMS:</b>	<b>PRODUCT TYPES:</b>
<input type="checkbox"/> Passenger Car/Trucks <input type="checkbox"/> Marine Vehicles <input type="checkbox"/> On-Road Motorcycles <input type="checkbox"/> Side-by-sides <input type="checkbox"/> Motorhomes <input type="checkbox"/> ATV <input type="checkbox"/> Pets <input type="checkbox"/> UTV <input type="checkbox"/> People <input type="checkbox"/> Scooters <input type="checkbox"/> Personal Property <input type="checkbox"/> Other: <input type="checkbox"/> Travel Trailers <input type="checkbox"/> Other: <input type="checkbox"/> Commercial Trucks <input type="checkbox"/> Other: <input type="checkbox"/> Golf Carts <input type="checkbox"/> Other: <input type="checkbox"/> Tractors <input type="checkbox"/> Other:	<input type="checkbox"/> Ancillary <input type="checkbox"/> Loyalty <input type="checkbox"/> Tire & Wheel <input type="checkbox"/> Collateral <input type="checkbox"/> Paint & Fab <input type="checkbox"/> VSC <input type="checkbox"/> Concierge <input type="checkbox"/> Paintless Dent Repair <input type="checkbox"/> Warranty <input type="checkbox"/> Etch <input type="checkbox"/> Pet Insurance <input type="checkbox"/> Windshield <input type="checkbox"/> Exterior <input type="checkbox"/> Pre-Paid Maint <input type="checkbox"/> Other: <input type="checkbox"/> GAP <input type="checkbox"/> Renter's Insurance <input type="checkbox"/> Other: <input type="checkbox"/> Home Warranty <input type="checkbox"/> Tire & Wheel <input type="checkbox"/> Other: <input type="checkbox"/> Interior <input type="checkbox"/> VSC <input type="checkbox"/> Other: <input type="checkbox"/> Key <input type="checkbox"/> Warranty <input type="checkbox"/> Other: <input type="checkbox"/> Lease Wear & Tear <input type="checkbox"/> Windshield <input type="checkbox"/> Other:
<b>PRODUCT SPECIFICATIONS:</b> <i>Please email spreadsheets, forms, etc. for each product to <a href="mailto:operations@tecassured.com">operations@tecassured.com</a></i>	
<input type="checkbox"/> Product Name <input type="checkbox"/> Insurable/Warrantied Item Type <input type="checkbox"/> End-User Form <input type="checkbox"/> Class Guides / Restrictions / Rating Criteria	<input type="checkbox"/> Rates with all bucket breakdowns including Reserves, Risk Fee, Premium Tax, Admin Fee, etc. Note that rates may not be input without all bucket breakdowns. <input type="checkbox"/> Surcharges/Options with Names, Rates, Buckets, etc.
<b>CUSTOM REPORTS:</b> <i>Please email examples, frequency, automations/triggers, etc. for each to <a href="mailto:operations@tecassured.com">operations@tecassured.com</a></i>	
<b>TRUSTED DEALERSHIP ONCE READY FOR FULL TESTING - DEALERSHIP/LOCATION NAME:</b>	
Address, City, State, Zip:	
<b>CONTACT PERSON NAME (will be provided login):</b>	Title:
Email:	Phone:

## PRICING QUOTE: