Everborn Productions

CLIENT INTAKE PACKET · FILLABLE

Tell us how your business runs.

Dealership F&I

Everything we need to build the system to how you actually sell. Fill in what you know; leave blank what you don't. Anything left blank is a question for the intake call, not an assumption we'll invent.

About two hours in week one. The builder reads every line, and the fields feed the variable sheet the build runs from.

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BEFORE WE START

Which package, and who we are dealing with.

- [ ] **Launch**
  $3,500 + $697/mo
  Every lead answered fast
- [ ] **Growth**
  $6,500 + $1,197/mo
  Plus The F&I Desk Engine
- [ ] **Full Engine**
  $9,500 + $1,697/mo
  Plus partners and the think-tank

Your name	**Title**
Email	**Cell**
Business name	**Website**
Date	**Referred by (rep or partner, if any)**

- [ ] We already own our own HighLevel account
- [ ] Regulated industry: book the week-one compliance review
- [ ] Domain, business email and phone already exist
- [ ] Starting from zero: set up domain, email and phone

How to use this packet

Type directly into the boxes and save, or print and write. Checkboxes mark what is true today. The last page is the sign-off that confirms what we'll build. Nothing in this packet asks for passwords, account numbers, or anyone's personal identifiers — we never collect those by form or email.

SECTION 1 OF 12

The store and the desk

The basics about the store and the F&I desk so we set up the account and size the build. The legal name must match the W-9 exactly for the texting registration.

Legal name as on the W-9

Units per month, new and used

F&I director, F&I managers, title clerk, controller

Current F&I PVR and product penetration

Per-vehicle-retail profit and the share of deals with each product. Rough numbers from last month are fine.

- [ ] Qualified Individual named
- [ ] Vendor safeguards addendum ready to sign

SECTION 2 OF 12

F&I managers

Everyone who works credit apps. We use this for the rotation, the re-sign and delivery calendars and the desk view. The claim window is how long a manager has to grab a new app before it moves to the next person.

F&I managers — name, cell and email, one per line

Round-robin order for credit apps

Claim window in minutes

How long one person has to grab a new lead before it moves to the next person in line. 5 is typical.

- [ ] Each manager has a calendar for re-signs and deliveries
- [ ] Desk view reviewed with a manager

SECTION 3 OF 12

Systems

The software your desk already runs. We need a daily export of deal status from the DMS. No SSN, date of birth, income or credit bureau data ever comes into the CRM.

DMS (CDK, Reynolds, Dealertrack, Tekion, PBS, Autosoft)

Credit portal (RouteOne, Dealertrack)

Contracting (paper vs. eContract share)
Roughly what percent of deals are eContracted today.

Product providers and administrators

- [ ] Daily export path for deal status agreed
- [ ] No SSN, DOB, income or bureau data flows into the CRM

SECTION 4 OF 12

Deal desk pipeline

We ship a standard set of deal stages you can rename. Contracts in transit get sorted into aging buckets and escalated when they sit too long. Tell us who gets the call at each point.

Confirm or rename each stage

CIT bucket thresholds and escalation contacts (day 7, day 15)
Contracts in transit are deals sent to the lender but not yet funded. Who hears about it at day 7 and day 15?

Standard stip list by lender
The documents each lender usually asks for: proof of income, residence, insurance and so on.

- [ ] Two-click inputs confirmed: stip received, deal funded

SECTION 5 OF 12 Lenders

Who you send paper to and who your reps are. When a lender kicks a deal back we log the reason from a pick-list, so give us the reasons you actually see.

Captives, indirect banks, credit unions with relationships

Lender rep contacts

Kickback reason pick-list

Common reasons deals come back: missing stip, income mismatch, signature, rate change and so on.

- [ ] Follow-up tasks at day 3, 7 and 10 approved

SECTION 6 OF 12 Products, cancellations and chargebacks

This drives the cancellation intake and the chargeback tracking. Refund windows come from each state's code and chargeback periods come from your own provider agreements, so we need the real documents, not a summary.

VSC, GAP and ancillary providers

States sold into and their refund windows

Chargeback statement format per provider

How each provider tells you about a chargeback: monthly PDF, portal, email. Attach a sample if you can.

Cancellation intake owner

- [ ] Statutory refund clock verified against each state's code, not the summary table
- [ ] Chargeback periods pulled from the store's own provider agreements

SECTION 7 OF 12

Declined-product campaign

A follow-up sequence for customers who passed on protection products at delivery. It mentions products only in general terms, never price or coverage, and stops the moment someone replies.

Delivery event source

Products to reference generically

F&I conversation booking link

- [ ] No pricing, payment or coverage claim in any touch
- [ ] Stops on reply

SECTION 8 OF 12

Title and tag

So the system can count down temp-tag expiry and flag titles that are running late. Tell us how long a temp tag is good for in your state and how much out-of-state work you do.

Temp-tag validity period

Out-of-state title volume

Title service bureau, if any

- [ ] Expiry countdown thresholds set

SECTION 9 OF 12

Partners

Outside contacts that touch the F&I desk. Partner statements show counts and dollars only, never customer names. The credit application and bureau pull never go to the credit repair partner.

Credit union direct-lend contacts

Insurance agents for binders

Credit repair partner for the turndown lane

Who declined customers go to. We route them there and bring them back when they are ready.

Employer purchase programs

- [ ] Partner statements carry counts and dollars, never people
- [ ] The credit application and bureau pull never go to the credit repair partner
- [ ] Counter cards handed in person

SECTION 10 OF 12

Compliance

Who reviews templates and how the store handles adverse action and menu presentation. Adverse action notices stay in your system of record, not in the CRM, and nothing goes live before the week-one compliance review.

Compliance counsel

Adverse action procedure and system of record

Where declined-credit notices are generated and stored today, for example the credit portal.

Menu presentation standard

The menu process you require, for example a four-column menu on every deal.

Template approval process

- [ ] Compliance review booked in week one
- [ ] Never-list wired into templates
- [ ] Adverse action stays out of the CRM
- [ ] MFA and roles enabled

SECTION 11 OF 12

Phone and texting

What we need to set up the tracked F&I line and register it for texting. The privacy policy needs a texting clause and the consent wording on the credit-app page has to match the registration. We prepare the paperwork; the store submits it.

Tracked F&I line

Privacy policy URL with SMS clause

Consent wording on the credit-app page

- [ ] Sample messages contain no finance or credit words
- [ ] Client submits the registration; we prepare it

SECTION 12 OF 12

Reporting

Who gets the 7am contracts-in-transit email, the weekly and monthly reports, and who can see the dashboard.

7am CIT email recipients

Weekly and monthly report recipients

Dashboard viewers

- [ ] PVR, penetration by producer, look-to-book, CIT days, kickback rate and chargeback rate wanted

THE NEVER-LIST FOR DEALERSHIP F&I AND THE DESK

What our automations will never say.

Tick each line to confirm you've read it. These are the rules every template is checked against before it goes live.

- [ ] A credit score. Any score. Ever.
- [ ] A score range or band, or a tier, grade or bucket: Tier 1, A paper, subprime, special finance, second chance.
- [ ] An approval threshold, or any statement of a credit decision or its reason. A decision goes out as a compliant adverse action notice, never as a text.
- [ ] Anything derived from a consumer report: bureau flags, trade-line counts, derogatory items, bankruptcy or repossession history.
- [ ] A payment amount, term, down payment, APR, rate or finance charge, including in an estimate.
- [ ] Guaranteed approval, everyone approved, no credit no problem.
- [ ] SSN, DOB, driver's license number, bank or card numbers in any message body or CRM note.
- [ ] The customer's income, employment details or stip document contents in any message.
- [ ] Any customer PII to a referral partner. A partner statement is counts and dollars, never names.
- [ ] Warranty or extended warranty for a VSC; product pricing presented as fixed where the state or provider doesn't permit it; any claim a product is required to obtain financing.

ANYTHING ELSE

What we didn't ask.

The three tasks eating the most time each week

What a great first 90 days looks like

Tools we already pay for (and which ones we actually use)

Anything else we should know

SIGN-OFF

This is what we'll build.

By signing you confirm the package chosen on page 1, that the information in this packet is accurate to the best of your knowledge, and that every automated template will be reviewed by your compliance contact before it goes live.

Signature

Date

Printed name

Title

What happens next

Within two business days you get a one-page brief and a fixed quote. Week one is intake and foundation; week four is handoff. everbornproductions@gmail.com · (916) 541-3415.