

Carousel Cars User Guides

Forms Guide

Version 2.010 January 2020

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Part 1 – Introduction to Forms

The printing of the forms is probably 60% of the value of the program. In order to complete a car deal, you will need to fill out up to 10 different preprinted forms, like purchase orders, odometer statements, title applications, loan forms, legal junk, etc. My program will fill these forms out for you. Just put the form in your (impact) printer, and select the correct form, and the program will fill in the blanks. We now can generate most forms on a laser printer directly, with the background of the form stored in our database.

The Admin program, Tables tab, Car Forms button will show you the complete list of all the forms we provide. One of the widgets on that dialog box is a button to display the actual form. I have scanned almost all the forms in the system, and they can be automatically displayed by pushing that button. (Note that my scanner tops out at 8.5x11 inches, so longer forms are truncated.) Directions on how to use this function are in the Admin User Guide Part 6.

Note that there are Reports, and there are Forms. Reports are produced by the Admin program. The difference between the two is aggregation. Reports aggregate information for many cars, like all the cars currently in inventory, or all the cars sold this month. Forms deal with just one specific car, so they are found in the Deal program.



Figure 1 – Preference List of Forms

As was mentioned in the Deal Guide Part 8, once you click on the Forms tab, you will see a dropdown list of forms that are available to be printed. You can select any one with the mouse, click on the Print button, and it will print out on your selected printer. Or, you can enter the form number into the box above the print button, and then click the button (or tab).

When you first enter this screen, you will see a Preference Forms List, which is the list of forms that you use most often. The full List of forms can be found by clicking on the radio button to the lower right of the list of forms. The full list of

forms are only those forms that you actually have on hand. To activate a form that is already in my database, but not being displayed on your screen, you must use the Car Form button of the Tables tab in the Admin screen. To change the Preference forms, another feature of the Car Form button handles that. See the Admin User Guide for more details.

Any of these forms can be renamed by the dealer. I provide an Alias feature for all forms. By default, the really ugly title and form number of the form will be displayed. If an Alias was provided, then that will show up instead on the Form Selection page. So, you could say for instance "Numerica Loan Form", rather than

Numerica Promissory Note ADM16650WA 4/03.



When you select a form and click the print button, you will (usually) then see a list of printers that you can select from. There is an entry in the Forms Table to indicate which printer (impact or laserjet) should be the default. The Admin Defaults tab is actually where you would define the physical printers for hard copy or plain paper.

For printing multipart or hard copy forms, we recommend the Okidata 320 turbo or 420 printers. Epson printers will also work, they are a little cheaper, but they do not handle the paper anywhere as well as the Okidata printers.

With version 2.10, most forms are now scanned into our database, and the form can be printed on a laserjet printer. This prints the background (the image) and the foreground (the fill in the blanks part) in one pass. That way, you do not have to stock the raw forms, and in many cases, you can get by with no hard copy printer at all. Some forms, even single part, are proprietary or copyrighted and so must still be bought and printed on a hard copy printer to fill in the blanks. Multipart forms are made of a very crinkley paper that invariably jams a laser printer if you try to print these forms one page at a time. Some older inkjet printers would handle this kind of paper, but they are getting very hard to find now.

Form placement can be dealer specific. That is, if a form for some reason is not printing correctly (this usually happens when a new batch of forms gets printed, and the printer did not line things up correctly) I can adjust where the data prints, on a form by form basis, in both the X and Y positions. This is done in the CarForms function of the Admin program.

With Rev 2.010, the forms are not necessarily done in code, as they always have been before, but you can create a script that can be processed by the Deal program to produce the form. This process is described in the Text Based Forms Document. Most forms have been converted to this method. When a form is done with this method, individual items to be printed on the form can be modified in the script at a client site.

The following pages are a list of the provided forms, by type, The funny numbers are my internal way of keeping track of what form is which. You can use these numbers to print a form directly, instead of selecting a form in the combo box. Where possible I have given the form number and revision date. Where it says "impact", then you must use a hard copy printer.

So, Which forms do you absolutely need?

As Section 8 of the Deal User Guide says, we display the forms in two ways: the long display, which lists all the forms available at your facility, and the Preference list, which lists those forms that you would use almost all the time.

So, what forms are those, at least in Washington State, that you always need?

My existing dealer clients say that you absolutely need the following:

- 1) Purchase Order
- 2) Odometer Statement for selling car.

Odometer Statements are not needed for vehicles that are over 10 years old.

- 3) Title App.
- 4) Dealer Temp (if the car does not currently have a valid license plate)

The above two forms have been replaced by the online SecureAccess web site.

- 5) Buyer's Guide (to display on the car)
- 6) Disclaimer of Warranty

It appears that in Washington, if you do nothing, that there is an implied warranty on a car. This document in effect says, that as soon as the car leaves your lot, that it is theirs, As Is. If the transmission falls out on the next corner, it is their problem. You as a dealer might want to help take care of this problem because of business reasons, but with this document signed, you do not have to.

- 7) Power of Attorney

This is especially useful if there is a tradein. It allows you to sign certain documents without hauling the customer back if some problem or question comes up, or if something is missing on one of the other forms. There are some limits to this authority.

- 8) Loan forms, if the car is to be financed
- 9) Proof of Insurance
- 10) Warranty forms, if you are selling the customer a warranty.
- 11) Gap forms, if you are selling the customer a gap policy.
- 12) Trade In Odometer statement, if you are taking in a tradein

Note that on our preference screen, that certain forms will be dynamic. That is, if you aint doing a loan, then the loan forms will not show up. Or a warranty, or a tradein, or whatever. Other forms will always be there, like the purchase order.

If you are selling to an out of state customer, there are some extra forms you will have to generate:

- A Buyer and Seller Out of State delivery or
 Buyer and Seller In State Delivery (Washington dealers only)
- B Title App for that state (we have Idaho, Montana, Oregon)

If you are an Idaho dealer, you will need most of the same forms as a Washington dealer:

Purchase Order

Buyer's Guide

Disclaimer of Warranty

Power of Attorney

etc

Idaho also has what is known as the "502", the
"Report of Sale and App for Certificate of Title".

This also serves as the Odometer Statement for Idaho dealers.

However, If you are delivering a vehicle to an out of state customer, then you would need

ST-104 Idaho Sales Tax Exemption Certificate

generic Odometer form

Title App for that state (we have Wa, Mt, Or)

Part 2 – Complete List of Forms

I have been displaying all the forms that I have in the system, but there are now over 1000 forms, and more get added each month. You can see the complete list of forms by bringing up the Admin program, going to the Tables tab, and clicking on the Car Forms button.

There is now a PDF picture of each of these forms available online, so that you can actually see the form that these represent.

The following sections tell you the groupings of the forms. I have attempted to use the first digit of the form number to give you some idea of what the form is used for. Thus 1xxxx will be a bank contract, and 6xxxx will be a government form. The tool in the Admin program lets you display these forms either alphabetically by their name, or by form number, or by their revision number if that is included. Most forms have a revision number at the very top or bottom of the form, along maybe with a date of the revision. A lot of these forms will magically change when you order a new batch, because somebody in the state govmnt or the warranty company or whatever had too much time on their hands, and fiddled with the form. If they are nice, they will give you a date of revision.

Up till version 2.010, all forms were produced with VB code. That was something that could only be done by me, even for tiny small changes of the forms. With version 2.010, I am converting all my forms to what I refer to as Text Based Printing forms. Now the form is described in a text file that is read in by my program when the form is being printed. This text file can be modified by me, the client, or anybody, and the client can even generate their own forms. This whole process is described in a separate document titled Text Based Forms Processing.

Also new with V2.010 is the ability to use a scanned image as the background for the form, and to print the background (the image) and the foreground (the fields) in one pass on a laser or inkjet printer. That eliminates the need to stock forms. The problem is, I can't do this unless I can obtain the copyrights to the forms, and that takes negotiation with the copyright owners. At present, I am using this technique for those government forms that are in the public domain on the internet, and with the blessing of my lawyer, Carousel has also generated its own commonly used forms.

Also new with V2.010 we have finally solved the large form problem, the problem when a form was more than 13 inches long, that we had to use a funny technique to print the forms that only allows line feed resolution. Now all forms can be printed with the windows driver, which gives you pixel resolution.

Scanned Forms and CS2PDF

1/10/2020

In the beginning, or at least in 2001, all forms that Carousel printed were on preprinted paper forms that you could only print on with a hard copy printer (eg Okidata). A few forms were generated from code, and later, a few forms were generated as Form Letters.

About 2010, Carousel started to develop a method to scan forms into a windows picture format (BMP to be exact) and then generate both the background (scanned portion) and foreground (fill in the blanks portion) on a single piece of paper using a laser or inkjet printer. This has the advantages that :

- A) You do not have to stock or even buy these forms.
- B) Carousel could develop forms (blessed by our lawyer) or use public domain forms (on government web sites) or a user generated form at no cost to our clients.
- C) Once set up, you can't screw it up. You can't put the paper in wrong so that the printout does not hit the blank spots, for instance.
- D) Microsoft generally will not break everything when they do an update to your computer.
- E) You can spool up a bunch of forms to the printer without having to wait for each form to finish printing.

The disadvantage is mostly that everything has to fit on an 8.5x11 inch piece of paper, and if you need multiple copies, you either have to copy the form generated, or generate the form multiple times.

Most forms I get start out as a PDF format document. I then print that off, scan it into BMP format, complete the process to fill in the blanks, and then ship it to you. But I am not allowed to do this with the TOCBWT xxx contract. I must in that case use the original PDF form itself. (For Legal, not technical reasons.)

So Carousel had to develop a method to do this. Sounds simple, but it took a lot of work to get done. But now that we have this method available, I will be using that technology for most all future forms that Carousel generates, and in fact, we will go back and redo some existing forms to use the original PDF, rather than the scanned version of the PDF.

This new method will be referred to as **CS2PDF**. A new program by that name has been written to accomplish that. When it is installed, you will see an icon on your desktop with that name. Generally, you will not have to run the program yourself. When the Deal (or Inventory) programs need to use it, they will start up the CS2PDF program. You will see this program appear on your desktop as a window with that name. It logs what is happening in that window. You mostly do not care about any of that, unless something does not work, so you can minimize that window.

When you use the Deal program to print one of these PDF Direct forms, you really will not do

anything different than you do now. Select the form, select the printer, and the form will print.

What is happening under the covers is, the Deal program communicates to the CS2PDF program what form has to be printed, and where to print it, and now That program physically prints the form on your printer. At the moment, you will get a message saying that the data has been sent over, but we will eliminate that message in a future revision.

I know that this seems an odd thing to do, but the Deal program is created with a 20 year old tool that did not know anything about PDF files, and so Carousel had to use a newer set of tools to do this job. We are actually converting all of Carousel to the new tools, but that will take a lot of time. Having this intermediary program handle these functions allowed us to provide the function without converting everything else first.

The end result of all this is:

- 1) Carousel can now give you a cleaner form, since we do not generate a BMP form as an intermediate.
- 2) We can now print the TOCBWT xxx form on a laser printer.
- 3) Carousel can develop or modify forms much quicker than the old method, since there are fewer steps to hop through.
- 4) Multi page forms are very easy to print with one form number, not several.

This new technology will be installed on your systems as we get around to updating your systems for any other reason, or installing any new forms.

Our database currently has 1027 forms. However, many if not most of these forms are either obsolete or redundant. Obsolete because the form is no longer used by any of my clients for whatever the reason. Redundant because, for paper and even scanned forms, when a new version of a form comes out, I have no way to know when all my clients have stopped using an earlier version of the form. For instance, I have 20 different version of the TOCBWT xxx form, dating back to 2003. I believe that if I can figure out what forms are actually being used, that I will get down to less than 300.

With the CS2PDF method, I can have just one version of these forms because when a new version comes out, I will just replace the old form with the new one and distribute that to my clients. I cannot do that with the BMP background forms because the scanning process is never exact, at least with my equipment. A PDF form is perfect everywhere (so far, at least).

The following list shows all the forms that we have (or expect to) produced in CS2PDF or scanned format. I am including forms that I intend to convert indicated with an asterisk *. Where there is an X in the form number, it means no number is assigned yet.

After this bunch gets done, lesser used forms will probably be converted also. If a dealer has a proprietary form he wants converted, that can easily be done also.

00001 Plain#	Carousel Dealer Recap
10993 CS2PDF	Carousel Wa BHPH Loan Contract w/ Lawyer Stuff
1099x Scanned#	Carousel Id BHPH Loan Contract w/ Lawyer Stuff
19010 CS2PDF	TOCBWT xxx for Washington
19011 CS2PDF	TOCBWT xxx for Washington (Reverse Calculation)
19020 CS2PDF	TOCBWT xxx for Idaho
19021 CS2PDF	TOCBWT xxx for Idaho (Reverse Calculation)
2015x CS2PDF*	TOCBWT Furnish Insurance 228RS (*Maybe)
20240 Plain#	Carousel Proof of Insurance
5017x Scanned#	Risk Based Pricing Notice
50210 CS2PDF	Report of Cash Payments > \$10K – IRS 8300 (8/2014)
502xx Scanned?	Various Credit Union Membership Applications
50270 Scanned#	Used Vehicle Recall Status Disclosure
50280 Scanned#	Authorization for Credit Card Use
60018 Laser	Wa Odometer for Selling a Car Page 1
60022 Scanned#	Wa Odometer for Selling a Car Page 2/3
60016 Laser	Wa Odometer for Buying Tradein Page 1
60026 Scanned#	Wa Odometer for Buying Tradein Page 2/3
60033 CS2PDF	Wa Vehicle Title App – TD 420-001
60076 CS2PDF	Wa Various Pre-scripted Certificate of Fact forms -- TD-420-040
60075 CS2PDF	Wa User Created Certificate of Fact forms -- TD-420-040
60094 CS2PDF	Wa Repossession Affidavit – TD-420-042
60104 CS2PDF	Wa Vessel Title Application – TD-420-289
60113 CS2PDF	WA Release of Interest for Trade In
60128 CS2PDF	WA Excise Tax Exemption for enrolled tribal member
60129 CS2PDF	Wa Dealer selling vehicle to Tribes – Rev 36 0002e
61036 CS2PDF	Id Title App ITD 3337
61050 CS2PDF	Id Sales Tax Exemption ST-104-NR
61072 CS2PDF	Id Release of Interest -- ITD 3777
61104 CS2PDF	Id Duplicate Title – ITD 3367
62034 CS2PDF	Montana Title App
63033 Scanned?	Oregon Title App (1/12)*
70053 Scanned#	Carousel Wholesale Purchase Order (Sold To)
70054 Scanned#	Carousel Wholesale Purchase Order (Bought From)
70970 CS2PDF	Carousel Purchase Order Wa w/ Financing w/ Lawyer Stuff
70971 CS2PDF	Carousel Purchase Order Wa No Financing w/ Lawyer Stuff
70975 CS2PDF	Carousel Purchase Order Id/Mt w/ Financing w/ Lawyer Stuff
70976 CS2PDF	Carousel Purchase Order Id/Mt No Financing w/ Lawyer Stuff
70981 Scanned#	Carousel Customer Recap Wa
70982 Scanned#	Carousel Customer Recap Id
79308 Scanned#	Carousel Due Bill
79414 CS2PDF	Consignment with a Licensed Idaho Dealer @ ITD 3415
79418 CS2PDF	Carousel Consignment Agreement
80056 Scanned#	Carousel Authorization for Pay Off

80077	Scanned#	Carousel Disclaimer/Implied Warranties
80078	Scanned#	Carousel Disclaimer/Implied Warranties Negotiated
80123	CS2PDF	Wa Buyer Affidavit Out of State Delivery – DOL Rev 27 0004
80124	CS2PDF	Wa Seller Affidavit Out of State Delivery – DOL Rev 27 0005
80125	CS2PDF	Wa Buyer Affidavit In State Delivery – DOL Rev 27 0002
80126	CS2PDF	Wa Seller Affidavit In State Delivery – DOL Rev 27 0003
80145	CS2PDF	Wa Release of Interest/ POA Trade in – TD-420-050
80154	CS2PDF	Wa Power of Attorney Sold Car – TD-420-050
80192	CS2PDF	Customer Choice Privacy form (was 80199)
80266	CS2PDF	Carousel Agreement and Acknowledgment of Good Will Service
80300	CS2PDF	Buyer's Guide 2017, As Is, front/back
80301	CS2PDF	Buyer's Guide 2017, Implied Warranty, front/back
80305	CS2PDF	Buyer's Guide 2017, Spanish, As Is, front/back
80306	CS2PDF	Buyer's Guide 2017, Spanish, Implied Warranty, front/back
81104	CS2PDF	Power of Attorney for Trade in Idaho
81105	CS2PDF	Power of Attorney to Sell Car Idaho

Synopsis of Generated forms

Before there was CS2PDF, but after 15 years of filling out preprinted forms, there were Scanned forms. These are forms that include the background (the image) along with the foreground. And before that, there were Form Letters, documents that any user could put together easily and have them print out in a nice word processey format. And before that, there were forms that were created with code, including backgrounds. These latter created their own backgrounds without the need for a separate image file.

The background for scanned forms must be a BMP image, due to the technology that I was using when this idea came up. The problem with BMP images, is 1) you have to scan them from a paper copy, and you can never seem to get the scanning exactly square, and 2) you generally do not get the size right for a number of reasons. So, when the CS2PDF process (above) came along, that solved all these problems, because generally what I start with is a PDF image that somebody else (a government agency, a bank) generated.

Some of these forms I call White Paper (WP). These are forms that are completely generated by code, or Form Letters [FL]. Over time, these too will be converted.

Over time, most of the scanned images will convert to CS2PDF images. But for now, here are the generated forms that are not planned to be converted yet. Note that this list does NOT include private forms, forms specific to a single dealer.

```
00002 Deal Recap (Customer Copy) [wp] (see 7098x)
00003 Commission Voucher [wp]
00004 Recondition Report for 1 car [wp]
00005 Commission Voucher - Flooring [wp]
00106 Notice to Co Signer [fl]
19001 Promissary Form to Pay Pickup Payments [wp]
19002 Promissary Form to Pay Down/Insurance Payments [wp]
20240 Proof of Insurance on Plain White Paper [wp]
50080 Homeland Security Statement [wp]
50180 Recondition Report [wp]
50270 Disclosure Form for Recalled autos @ Carousel/Lawyer
Scanned
50280 Authorization for Credit Card Use @ Generic Scanned
60093 Wa Affidavit of Repossession @ TD-420-042 (12/08) Scanned
```

Part 3 – Characteristics of individual forms

Type 00000 -- Dealer Reports

- 1: Deal Recap (Dealer Copy)
- 2: Deal Recap (Customer Copy)
- 3: Commission Vouchers
- 4: Envelope Addressing
- 5: form letters

These reports are the exception. These forms print out on plain paper. They print out a summary of the deal for a car. The Dealer Recap (figure 1.1) prints everything, and the Customer Recap (figure 1.2) prints only that data that a Customer should be allowed to see (eg, his prices and costs). The following two samples are from the same deal.

You will see a bunch of funny letters down the left side of each report, and another set of letters in parenthesis just after some of the line descriptions. Those lines where there is a letter in a parenthesis are summations of those lines with the same letter on the left side of the page. For instance, the Taxable Subtotal (A) is the sum of Price and Trade In Costs, each of which have an A to the left of their line description.

These reports look kind of crummy, and they are, but their looks will get improved in a future release.

Dealer Recap Report				
Stock # 2229 car:1999 Chrysler pt cruiser None Gray/NA VIN:22KKDDJ8				
Mileage in : 10998				
Car is not yet sold				
Customer Information				
Blatherspoon ,Arthur				
234 5th st spokane WA 99222				
Company Phone Number: (509)8896665				
Social Security Number: 559-55-8874				
Driver's License: NA				
Dealer Suggested Retail Price: \$12,500.00				
Code	Item	Customer Costs	Dealer Costs	Profit
AD:Price		\$12,000.00T	\$9,847.00	\$2,153.00S
Trade In #1:				
AD:costs		(\$6,500.00)T	(\$6,799.00)	\$299.00S 55: Brown Vol
BD:Payoff		\$500.00	\$0.00	
D:WriteDown			\$400.00	
D:Down			\$13.88	(\$470.40)S
D:Reconditioning				
BD:license		\$29.50		
BE:Warrantees		\$625.00	\$505.00	\$120.00F AUL Administrators
BE:Gap Coverage		\$125.00	\$87.50	\$37.50F Premier 1000 D
No Lender Discount				
C:Taxable ST	(A)	\$5,500.00		
CD:Sales Tax @8.1%		\$445.50		
E: B&O Tax			\$56.52	(\$56.52)
C:Non Taxable ST	(B)	\$1,279.50		
C :Cash Down		(\$1,000.00)		
:Total Payment	(C)	\$6,225.00		
Finance Charges				
E: 8.5% @36 Mths		\$877.44		\$325.00F Numerica
Mthly Payment: \$197.29				
E:Sales Charges	(D)	\$6,475.00	\$3,405.36	\$1,981.60S
F:Finance Charges	(E)	\$1,627.44	\$592.50	\$482.50F
:Total Charges	(F)	\$8,102.44	\$3,997.86	\$2,464.10

Figure 001 – Dealer Recap

Customer Recap Report				
Stock # 2229 car:1999 Chrysler pt cruiser None Gray/NA VIN:22KKDDJ8				
Mileage in : 10998				
Car is not yet sold				
Customer Information				
Blatherspoon ,Arthur				
234 5th st spokane,WA 99222				
Company Phone Number: (509)8896665				
Social Security Number: 559-55-8874				
Driver's License: NA				
Dealer Suggested Retail Price: \$12,500.00				
Code	Item	Customer Costs		
AD:Price		\$12,000.00T		
Trade In #1:				
AD:costs		(\$6,500.00)T	55: Brown Volvo 740	444NNNN
BD:Payoff		\$500.00		
BD:License		\$29.50		
BE:Warrantees		\$625.00	AUL Administrators	
BE:Gap Coverage		\$125.00	Premier 1000 Deductible	
C:Taxable ST	(A)	\$5,500.00		
CD:Sales Tax @8.1%		\$445.50		
C:Non Taxable ST	(B)	\$1,279.50		
C :Cash Down		(\$1,000.00)		
:Total Payment	(C)	\$6,225.00		
Finance Charges				
E: 8.5% @36 Mths		\$877.44		Numerica
Mthly Payment: \$197.29				
E:Sales Charges	(D)	\$6,475.00		
F:Finance Charges	(E)	\$1,627.44		
:Total Charges	(F)	\$8,102.44		

Figure 002 – Customer Recap

Actually, there is a better looking version of the Customer form –70981 for Washington and 70982 for other states. It prints out with a background that can be customized with a dealer logo.

The Commission Voucher report gives the dealer a set of vouchers to give to the salesmen and finance guy on this deal, reporting what they made on the deal. The form is designed to be sliced into three parts.

Sales Voucher for Derek Profundo	
Printed on 10/10/2012 8:32:11 AM	
Car: 1225 -- 1998 Red Buick Century 213498734JKJBP	
Sell Date: 6/7/2001	
Customer: Joe Blow	
13344 5th St. Omaha, NE 68123 (000) 3332223	
Profit	\$909.50
%Comm	20%
Commission	\$181.80
Bonus	\$0.00
Total	\$181.80

Figure 003 – Salesman Voucher

For the envelop addressing and formletters, please see Part 4 of this document.

Type 10000 – Loan Forms

About half of these bank forms are longer than legal size, which is 14 inches long. I used to use one programming method for forms legal size and smaller, and have to use a different method for the longer forms. The difference is, the longer form method a) did not put up a dialog box, and b) I was limited to printing vertically to 1/6 inch resolution, whereas the smaller forms I can print to just about any resolution. I could also change fonts in smaller forms, but not in longer forms.

The good news is, I have finally obtained the technology to use the small form technology with large forms, and have converted all the currently used forms to this method. So now, from the point of view of the client, all the forms seem to work the same.

Most banks either use their own specific form (eg Numerica) or will use a generic form (TOCBWT xxx). The Bankers System forms do not provide a specific space for the Documentary Service Fee, and several banks got all testy about this and want this value in a specific place, which of course is not the same place as the other banks, even though it is the same form. If you look at the description for forms 127 and 129, they are the same form, but different banks want this item in different places.

R&R recently allowed Carousel to distribute their letter sized version of the xxx form. They laid down a bunch of commandments on how we can distribute this, the major ones being that a) our client has to sign a license, and b) they are not free.

Carousel has a contract that can be used for Buy Here Pay Here deals. It comes with four pages of legal stuff written by our lawyer. Although banks should accept this form, most banks will ONLY take the TOCBWT xxx form. Contact us for more information about this.

These are the hardest forms of the whole bunch to deal with, because there is so much information, and it is sometimes not easy to figure out just what they want in a specific place. Whereas most forms take me one to two hours to do, these usually take me all day.

Type 20000 – Proof of Insurance Forms

Banks get testy about another thing, and that is that you have insurance to drive your vehicle, since if it wrecks, they want to get paid off. So there is a whole series of forms, many bank specific, to fill out this information. Since the forms require information from the customer's insurance policy, a popup box will show up which will ask you for all kinds of this information, like how much coverage, policy number, what kinds of coverage, etc. Note that not all banks want the same information, funny thing. So while the popup box asks for everything that anybody has ever asked for, you only need to fill out that information that this bank actually wants.

You can fill out this popup box in advance by clicking on the InsFrm button in the Deal tab. Whenever you ask for a proof of insurance form to print, this box will pop up. However, I do

remember (eg save in the database) all this information for a customer, and if it already got filled out once, you will see that information displayed on the popup form. You can just click on Exit and then the form will print.

If you want to scream ahead, you can leave the form blank, and when I print the Proof of Insurance document, I will leave blank any place where there is an NA or whatever the default is.

Type 30000 – Warranties

Because there are so many different warranty policies, I only fill out the customer and car information, and maybe the price of the warranty and date of sale, but not the various checkboxes for the zillion different warranties out there. Although more recently, I have generated some popup boxes to deal with these checkboxes and things. Put an X in the field where you want a checkbox, and leave it blank where you do not.

I once suggested that I could create a table of warranty costs, but then one of my dealers showed me the information booklet for a few companies, and I decided that I will let you guys look all that up, and hand check the various options and types.

Type 40000 – Gap, or Collision

Gap, sometimes called Collision coverage, is to have some sort of protection in case the car gets a big boo boo. It pays off the loan on a totaled car.

As with warranty forms above, I do not fill out all the specific coverage details for these policies, since they vary so much.

Type 50000 – Other Insurance and Bank Forms

This is a catch-all for all the forms that don't fit in the previous four types. There are not many, and they are kind of weird.

I do have one health insurance coverage form that shows up on some bank loan forms. But, a dealer needs to be a licensed insurance agent to sell this and none of my dealers do sell it as of now.

Type 60000 – Government Forms

The govmnt gets heavily involved in any car transaction. There are Title Applications, Odometer Disclosures, Temporary Permits, and of course each state is different. I currently have most of the forms for Washington and Idaho, and the Montana title application. These are mostly easy to add.

The real problem is, there are several different versions of each form. Somebody in our govmnts has too much time on their hands, so they fiddle with the form, and move this field over here a twitch, and that field over there a squoach. So that the 1999 version of the form, while very similar at first glance to the 2002 version of the form, isn't the same and the fields don't match. And then to make things even more fun, sometimes an organization like WSIADA will put out their own versions of the forms, and they of course aint quite the same as the DOL version. And finally, sometimes the DOL will have holes in the rip off tab, and sometimes they won't, and that affects where the fields are.....

In Washington, they have made like five versions of the Title App, now called Certificate of Ownership, along with the Address Verification forms in the last two years. And I hear, there are more changes to come.

Anyway, to figure out just which form you need, you must look a) at the title (at the top of the form), b) at the form number (generally at the bottom of the form), and the revision date (next to the form number). And if it is WSIADA or not (which means DOL). And if you get it wrong, it usually aint my program, you picked the wrong form.

When I set up your system, I will configure the forms that you physically DO have, and I will inactivate (make not showing) those forms that you do NOT have. Sometimes you are still working on old forms. When you get the new forms, do NOT call me up and say my program just broke. Check the form number and revision date, and then call me up and we will activate the new form, if I have already seen it.

I can print the date in big letters on the Dealer Temp and Temp Permit forms. These are the cardboard parts of the form that go on the back window of the car in lieu of a plate. Most government forms are in the public domain, and I have scanned these. The exceptions are the Washington odometer, and the Idaho 502.

Laser Odometer Forms

WSIADA now has a version of the **Washington Odometer form** that can be printed on a laser printer.

For most of my small dealers, this is the only form that they need a hard copy (eg Okidata) printer for. These dealers do not do bank forms, and do not do warranty or gap forms. Almost Every thing else they need is already in laser format by Carousel. Some clients do this by hand, which is perfectly legal. Some have bought an Okidata printer just for this. All my clients already have a laser or inkjet printer available.

The procedure is a little awkward, since Carousel is still not allowed to scan the front of the form. So you have to buy the 1st of the three pages from WSIADA. At the moment, you will not find these forms on their web page. You have to contact WSIADA directly, and sort of like in the old Speakeasy days during Prohibition, knock on the secret door, and when the slider window opens up, whisper that Dennis sent you and you need some Laser Odometer forms. These forms sell at the same price as the hard copy multicopy forms. That form that you bought is put into a laser or ink jet printer, and Carousel will fill in the blanks on that form. Then you can print the other two pages (Dealer and Customer) from a scanned image, after you punch into the popup box the serial number of the original master page that you just printed.

So, let me make that last paragraph a little more clear. Maybe...

- 1) take an original laser version odometer page that WSIADA sold you, and put it in your laser or ink jet printer. (HOW to put it in will be different for different printers. Some printers have a single form feed option. Most of those do not work very well. I have been putting my test forms into the standard paper feeder for my printer.)
- 2) print this purchased Laser page using Carousel form number 60012. That fills in the blanks on the form you just put in, the one that goes to the DOL.
- 3) then print Carousel form number 60022 twice, on plain paper. This will print the background and the foreground on plain paper. The DOL will not itself accept it, but WSIADA says it is OK for the Dealer and Customer forms (the last two in the standard triplet form you have been using up till now.)
- 4) when you print form 60022, it will ask you for the serial number at the bottom of the form you printed in step 1. That serial number will be printed on these two pages in addition to all the standard stuff that has to be there. You only have to enter this number for the first copy. The system will remember the number for the 2nd copy.
- 5) these last two forms, the ones you printed on plain paper, will have the words "DEALER or CUSTOMER COPY" at the bottom. And the serial number you printed will be at the bottom also.

6) so now you have the three pieces of printed paper -- one is the form you bought from WSIADA, and the other two are the ones that you printed directly on your printer.

So, why, you may ask, did we not just print this stuff using the standard three carbonless sets that WSIADA and DMV have been selling?

Because carbonless paper almost always crumples up when it goes through a laser or ink jet printer.

Why not just make a copy of an original form, and use that?

First, you need valid serial numbers.

Second, if you try to copy an official odometer form, you will see the word "Void" all over the background. (Ahem -- I tried that already...)

What do you do for a tradein?

Use the same procedure, but select Carousel form numbers 60016 (for the original) and 60026 (for the two other pages).

What do you do when a dealer gives you a partially filled out odometer form?

It will probably be on carbonless paper, and so will not reliably be able to be printed on anything but a bang bang printer. Break out your quill pen and inkpot and pretend you are a medieval scribe.

This may all be more trouble than it is worth if you already have an OkiDoki printer and print bank contracts and warranty forms on it. However, if this is the Only form that you print on that printer, you could make your life a little more hassle free by ripping that printer out of your system and life, and just use these forms on the printers that you already have, know, and love. If you have been filling these things out by hand, this process should be much easier and probably neater than your own crappy handwriting.

So, if you want to try this, let me know and I will give a demo. I have a few of these forms (like, most of a package) to demo with.

License Express

We can fill in the data for the Washington License Express web site. The procedure is a little strange, and is described in the G4 License Express document found on the Carousel Splash screen (the screen with all the horsies).

Type 70000 – Purchase Orders

Many dealers have their own purchase order forms printed up, with their names on it. There are a few generic forms out there. Of that bunch, I particularly like the WSIADA form E6. It gives me space for most of what I want to put on there, and gives me space to add stuff not already there.

Carousel has also generated our own scanned Purchase order. There are different versions for Washington and Idaho, with and without contract information. These have been blessed by our lawyer, and they come with two pages of legal stuff to protect the dealer.

For the WSIADA E6 and Carousel forms only, if you enter a comment for the car (using the big Exclamation point in the Deal or Inventory screens) that starts with the letters “PO:” (case sensitive), that line will be printed on the purchase order form on the same line as “Cash Price for Vehicle”. This is useful for any disclosures that you may want to make to your customer in writing.

Note that we also have the Wholesale forms (and can print both sides of the transaction), Dealer to Dealer transfer forms, and can print most Dealer Jackets. Dealer Jackets must go into the printer left edge on (eg Landscape form). The Okidata printer has a problem printing in this format unless you use a 16 point font size, for some reason. So I do. But that makes the printing rather big. A lot of the deal jackets can't fit in the Okidata printer anyway, so we recommend that you print the content on plain paper (note that the boilerplate part of the jacket also prints on this plain paper so that the jacket lettering does not bleed through). Then use a glue stick to glue the paper to the jacket. You can print the car info at Inventory time, and just leave off the sold info (which does not yet exist). Then when the car gets sold, just print this same form again, rip off the buyer information, and past that onto the form too.

I also use this area to print the Due Bill forms, sometimes known as the WeOwe. The data for these forms can be filled out in advance (there is a due bill button on the Deal tab), or just before the form prints (a popup will show up), or will automagically be entered if you used the Optional Equipment feature of the Deal program. This data is saved in the database, so you can refer back to it later. Carousel has a scanned version of this form.

Type 80000 – Legal Forms

Legal forms are legal documents not provided by the government (which are the type 600 forms). These include Power of Attorney, the Buyer's Guide that goes on the side of the car, and all kinds of other stuff.

Note that there are like four different types of buyer's guides, none of them have form numbers, and some require a microscope to tell the difference. While I can fill out the back of these things, because of the carbonless paper, the printing on the back will also be seen on the front, so you

might want to skip doing this.

Power of Attorney and Release of Interest forms are for trade-ins. These allow you to sign documents for the client when you have to do the legal junk to transfer their car to your name.

Type 90000 – Calibration Forms

- 997: Calibrate Impact Printer (long)
- 998: Calibrate Impact Printer (short)
- 999: Calibrate Windows Printer

These “forms” are not really forms, but are needed to set up the printer correctly so that the program will hit the form marks.

The 999 form for windows is the easiest to use, and takes care of most of the work. It prints out a series of “X” marks. The upper left mark, for instance, should be half an inch down from the top of the paper, and half an inch across from the left of the paper. If it is not, you can fix it in two ways: move the paper left or right in the printer, or set the top of form higher or lower; or go to the Admin defaults screen and fiddle with the top margin and left margin values till the 999 form prints correctly.

Once the windows printer is set up correctly, then you need to calibrate the impact printer. You have no left/right control over this except moving the paper. You can bump where things print vertically by fiddling with the Impact Top Lines default value. Note that this value is times 10 – to move one line down, use the number 10. If the value entered is not an even multiple of 10, then a half line will be generated. When the 998 (short) calibrate form is printed, line 66 should be the bottom line on the page. The 997 form will print on across to a second page, like long bank forms, and you want to be sure that there are no skipped lines around the perforations at the end of the first page. If you find this happening, you have to deal with your printer to turn this feature off.

The 90000 area is also where we put forms proprietary to a specific client.

Part 4 – Form Letters and Envelope Addressing

A new feature has been added to the Carousel Software System: formletters, and envelope addressing from the database.

So, why would you need this stuff? This started out as a request from a client to simply have a computerized way to address envelopes. For five bucks I could grab a program off the internet that would do this, but I thought that it would be much more useful if I could just get the address information out of the Customer Database, since probably most of the letters you would want to send are to recent customers. When I started talking to other clients about this, I got a request to also provide a way to generate form letters to these customers, like thank you letters.

These features are encapsulated in two programs: the form letters are part of the existing Deal program (forms section). The envelope address function is part of a new program, the Envelope Addresser program.

Since the advent of scanned forms, most of the formletters have been abandoned in favor of creating a scanned version of the form.

I. Envelope Addressing

See the new Utilities Document for more information on this.

II Customer Forms Envelope



So, you have just finished doing a deal, and you have this big wad of paper to hand over to the customer. What does he do with it? Heaven only knows. However, some dealers will put all that loose paper into an envelop for them. And some dealers will even write on the envelope what this stuff is. The Deal Program Forms section now has two new entries, #5 and #6, that will do this. They only work in landscape format, and the difference between the two is that #6 prints on the opposite side of the printer than does #5. The difference between these envelopes and the Envelope Addressing program above is that this function also prints out the description of the vehicle on the right hand side of the envelope.

D&C Cars N4906 Northwood dr Spokane, WA 99212	Stockno 2251 1976 Dodge ram Green 223DKDKIDJ
Sam Spade 333 3rd av spokane, WA 99422	

III Form Letters

Once you can address an envelope with the computer, it sort of follows that the letter that goes into the envelope could be generated by the computer too. So I was asked to generate a Form Letter Writer.

My thoughts on this were:

- a: It should start with a user defined template
- b: There should be provision for several different letters
- c: You need to merge database information into the body of the letter
- d: You need to be able to customize each letter
- e: You need to be able to add enhancements (bolding, etc) to the letter.



I have put aside Form Numbers 100-399 for such form letters.

First you have to use MS Notepad or some text editor to create the template. You need to use Notepad, and not some word processor (like MS Word, or MS Wordpad) because I need to know where the line endings are, and notepad will preserve this.

So first you generate a document that looks like the following:



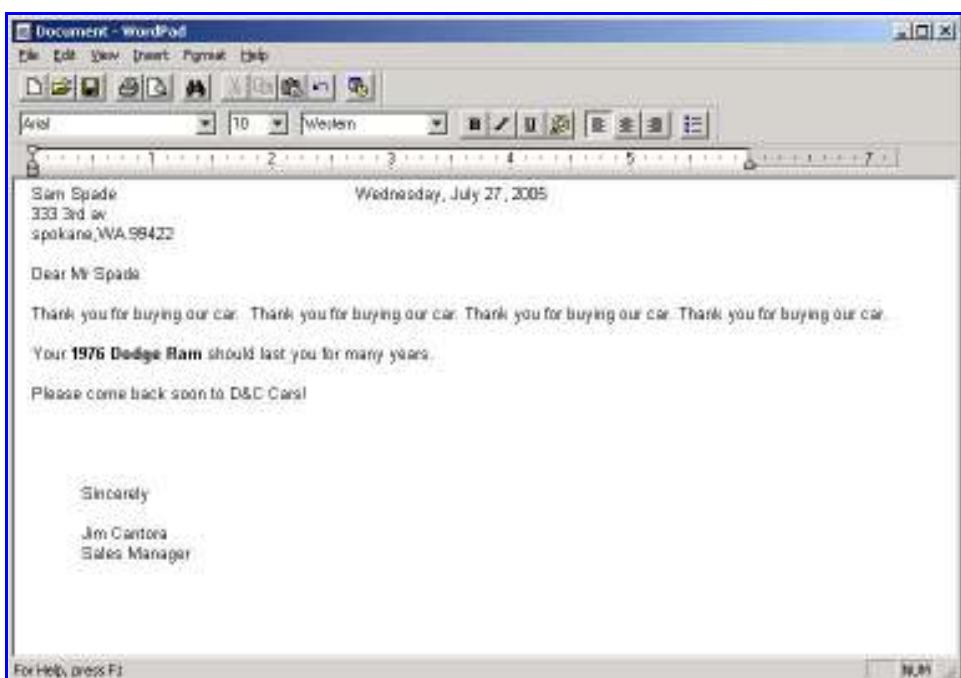
Note that there are a lot of funny symbols here, which are three asterisks, a word, and three asterisks. These are the Database Variables that I have provided so you can merge things from the database into your form letter. The complete list of Database Variables

will appear at the end of this section.

These documents must be named Formletter100.txt to Formletter399.txt, and must be put into a directory named C:\auto\formletters. Formletter100.txt will be selected by Form #100 in the Deal program Forms selection box, Formletter101.txt by Form #101, and so on.

When you run the form (Form #100 in this instance) the Database Variables will be substituted

with their actual values from the database, and the contents of the reformatted letter will be pasted into MS Wordpad, a word processor that comes with all versions of MS Windows. Wordpad will be brought to life by my program, and the contents of the letter pasted in there. (Sometimes this does not work, for some reason. Simply right click on the Wordpad screen, and then click Paste to put it there.)



The screen at the left is what you will see in the Wordpad screen, after the reformatting of the template file above. You can see that the customer name and address, the current date, the vehicle purchased, the dealership name, and the salesman's name are all merged into this letter. At this point, you can manually make any additions or revisions to this

letter that you would want (you will not affect the template by doing this). In this case, I have added bolding to the 1976 Dodge Ram. One could add personal paragraphs, about how you hope little Jimmy and Nancy all like this truck too. Click on the printer icon in Wordpad, and you can print this letter. The envelope can be addressed with the Envelope Addresser program in the first section above.

A problem came up when a client tried to create their own formletter template. They modified one of the existing templates, but that template got restored back to the original the next time I did an update. I will now reserve the 400 series of formletters for private ones, that I will not destroy on an update. Currently only 400-499 are protected, but more could be if the need arises.

Below is the current list of Database Variables that you can use. More are easy to add. I just need to know what it is you would want. They have to be something that would be in the database for that deal.

– Buyer Information

FULLNAME	Buyer Full Name
UFULLNAME	Preceding U means force upper case
LASTNAME	Buyer Last Name
FIRSTNAME	Buyer First Name
ADDRESS	Buyer Address
UCADDRESS	Buyer Address in upper case
CITYSTZIP	City, State and Zip as one variable
UCCITYSTZIP	uppercase
CITY	Buyer City
STATE	Buyer State
ZIP	Buyer Zip
HPHONE	Buyer Home Phone number (xxx yyyyyyy format)
WPHONE	Buyer Work Phone number
CPHONE	Buyer Cell Phone number
DOB	Buyer Date of Birth
SSN	Buyer Social Security Number
COMPANYNAME	Buyer's Company Name
BUYER2NDB	2 nd banana – either Co buyer or Spouse
2NDSSI	2 nd Banana Social Security Number
2NDBBDAY	2 nd Banana Birthday

– Current Date

DATE	Current date, formatted as Monday, July 15, 2006
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– Vehicle Information

STOCKNO	Vehicle information
CARYEAR	Vehicle year
MAKE	Vehicle make
MODEL	Vehicle model
VIN	Vehicle vin
COLOR	Vehicle primary color
PLATENO	Vehicle License Plate number
SELLDATE	When the vehicle was sold, as mm/dd/yyyy
SELLDATEMM	Sell Date in mmm dd,yyyy format
SALESMAN	Primary salesman for the deal
SELLPRICEN	Selling Price as \$9,999.99
SELLPRICET	Selling Price written out ("One Thousand, two ...")
SELLPRICEUT	Selling Price written out, upper case

– Finance Information	
INTERESTRATE	Interest Rate (as 9.99)
MONTHLYPAYMENT	Monthly Payment (as \$999.99)
PAYMENTMONTHS	Number of payments
DATE1STPAYMENT	Date of first payment (as mm/dd/yy)
– Dealer Information	
SALESMAN	Who sold this car
DEALERNAME	Dealer Name
DEALERADDRESS	Dealer Address
DEALERCITY	Dealer City
DEALERSTATE	Dealer State (2 letters)
DEALERZIP	Dealer Zip
DEALERPHONE	Dealer Phone number
DEALERFAX	Dealer Fax number
DEALERCITYSTZIP	Dealer City, State Zip
– Finance Company	
FINANCECO	Finance Company Name
***FINANCECOADDRESS	Finance Company Address
FINANCECOCITYSTATEZIP	– Finance Company City, State and Zip
– Insurance Company	
INSURANCECO	Insurance Company Name
INSURANCEAGENT	Insurance Agent
INSURANCEPHONENO	Insurance Company Phone Number
INSEXPDATE	Insurance Policy Expiration Date
INSCOMPDED	Insurance Comprehensive Deductible Amount
INSCOLLDDED	Insurance Collision Deductible Amount

Form 103 Vehicle Consignment Agreement

To make form 103 work, first enter the desired payment to the owner upon sale of the car in the Wholesale Suggested Retail price (car cost part of the inventory program). Then create a phony deal, using the car owner as a potential seller of the vehicle. This is so I can connect the owner to this vehicle. Once you have done those two things, you can print out form #103 from the deal form list.

Formletters 400-499

These are restricted form letters, and are available for use only by the specific customer that provided the text to me. These are mostly legal forms whose legal wording is in question, eg, did a lawyer ever see this stuff or not? Since I don't know, I cannot deliver them to other people than the one who gave it to me.

<see comments>