

ASP SaleSource® 2.0 Installation and Contact Form

NOTE: The information you submit on these pages is used in the initial setup of *your* SaleSource® 2.0. Please complete this form and sign on the reverse side. Installation cannot begin, until we receive *both* pages of this form *and* your signed Sale Processing Form.

Agency Name:			
Key Contact:		Title:	
Telephone:	Ext:	Fax:	
E-Mail Address:			
Postal Address:			
City:	State:	ZIP:	ZIP+4:
Current Company (Agency) Management System:			
Current Contact Management System (if any): <small>(ACT, Goldmine, Outlook, Access, etc.)</small>			
Company Internet Connection Type: <small>(Note: ISDN / DSL is required for running the Daily Process)</small>		Printer Model:	

How we define SaleSource® 2.0 “Users”

1. “Users” are those individuals *operating* SaleSource® 2.0 (i.e. setting up Campaigns, editing Templates, creating Strategies, defining Events, running the Daily Process, importing Prospects, adding or changing data in SaleSource® 2.0, etc.). This is a “hands-on” user of the software. Quite often this is the Agency “Administrator” in an agency organization. This might be where the *one-time charge* for the Installation Fee is applied (as well as the monthly User Fee). Note that the Installation Fee is not necessarily applied to all “Users.”
2. “Users” are those individuals who are involved in SaleSource® 2.0 marketing Campaigns and the resulting contact, relationship building and selling process. Usually these are Producers and Managers/Producers. These individuals are “Users” who, *using* SaleSource® as a process tool, create or contribute to sales and resulting commissions for their own benefit and/or that of the Agency. For example: If you are a Producer or a Telemarketer and receive Action Worksheets from SaleSource® 2.0 to set appointments and/or start the selling process (or otherwise act on Action Worksheet information), you are a “User.” If your name is used in an Event (e.g., a letter, Template, Call Sheet, Report, etc.), you are a User. If you are assigned Prospects in the Prospect Manager or in a Campaign, you are a User. If you are assigned to any role in a Campaign as a Salesperson (Producer), Manager, Account Representative or Telemarketer, you are a “User.”

Who are your SaleSource® 2.0 Users?

1	First:	Middle:	Last:	Suffix:
Title:			<input type="checkbox"/> Salesperson	<input type="checkbox"/> Manager
E-Mail Address:			<input type="checkbox"/> Account Rep	<input type="checkbox"/> Telemarketer
Telephone:				
2	First:	Middle:	Last:	Suffix:
Title:			<input type="checkbox"/> Salesperson	<input type="checkbox"/> Manager
E-Mail Address:			<input type="checkbox"/> Account Rep	<input type="checkbox"/> Telemarketer
Telephone:				
3	First:	Middle:	Last:	Suffix:
Title:			<input type="checkbox"/> Salesperson	<input type="checkbox"/> Manager
E-Mail Address:			<input type="checkbox"/> Account Rep	<input type="checkbox"/> Telemarketer
Telephone:				

Over →

ASP SaleSource® 2.0 Installation and Contact Form

Who are your SaleSource® 2.0 Users (continued)?

4	First:	Middle:	Last:	Suffix:
Title:			<input type="checkbox"/> Salesperson	<input type="checkbox"/> Manager
E-Mail Address:			<input type="checkbox"/> Account Rep	<input type="checkbox"/> Telemarketer
Telephone:				
5	First:	Middle:	Last:	Suffix:
Title:			<input type="checkbox"/> Salesperson	<input type="checkbox"/> Manager
E-Mail Address:			<input type="checkbox"/> Account Rep	<input type="checkbox"/> Telemarketer
Telephone:				
6	First:	Middle:	Last:	Suffix:
Title:			<input type="checkbox"/> Salesperson	<input type="checkbox"/> Manager
E-Mail Address:			<input type="checkbox"/> Account Rep	<input type="checkbox"/> Telemarketer
Telephone:				

If you need space for more Users, please attach a sheet.

Do you have a “Technical Support” person for your organization? Yes ___ No ___ If so, who is your *Technical Contact*?

Technical Contact:			
Telephone:	Ext:	Fax:	
E-Mail Address:			
Postal Address:			
City:	State:	ZIP:	ZIP+4:

Please *sign and date* this submission of your installation and key contacts data.

Signature:	Date:
Title:	

Please return your *signed* Installation & Contact Form to support@aspsalesource.com. You may FAX *both* pages of this form to ASP SaleSource Customer Service at (414) 258-5417. If you have questions, please call us at (888) 755-5554.