

Pickup & Delivery Phases Checklist

SCHEDULE

- Confirm Customer Details
 - Search or create customer in Dealerware Web
 - Review and complete profile details
 - Driver License Address = Delivery Address? (If not, notate elsewhere)

- Book Contract
 - Create new contract in Dealerware Web
 - Discuss time window expectations
 - Discuss vehicle expectations (Optional - Reserve using status / physical location)

- Set Appointment
 - Send written confirmation
 - Ask about special delivery instructions
 - Note required items or Documents

DISPATCH

- Plan Trips
 - Use **Contracts** in Web or Mobile to view booked contracts for the day
 - Locate Delivery Address from Drivers License (or separate notation)
 - Plan departure based on estimated travel time (Google Maps)

- Select Vehicle
 - Choose Vehicle
 - [Optional] Search customer name in Vehicles if pre-reserved
 - Move status to "Shuttle" before departure

- Text when on the way

Arrive

- Stage Vehicle
 - Move vehicle from “shuttle” to “staged”
 - Stage interior (sanitize and reset tech interface)
 - Stage exterior (quick wipedown)

- Contact Customer
 - Text that you are outside ready
 - Call after a few minutes if no response
 - As a last resort knock on door of residence

- Start Contract
 - Assign vehicle to contract and walkaround to check vehicle issues
 - Sanitize the device until customer is comfortable with handling
 - Customer starts contract on device

Depart

- Pack-up
 - Collect all items/ bags from loaner vehicle and move to service vehicle
 - Scan customer vehicle for medications, sunglasses, gate openers

- Key Check
 - Confirm customer has key to loaner prior to leaving

- Return to Dealership
 - Get customer’s vehicle into service ASAP
 - Text customer vehicle safely delivered to the dealership

Return Customer Vehicle

- Schedule - Decide time and place once service is complete
- Dispatch - Get their car and text on the way
- Arrive - Close contract
- Departure - Item & Key Check