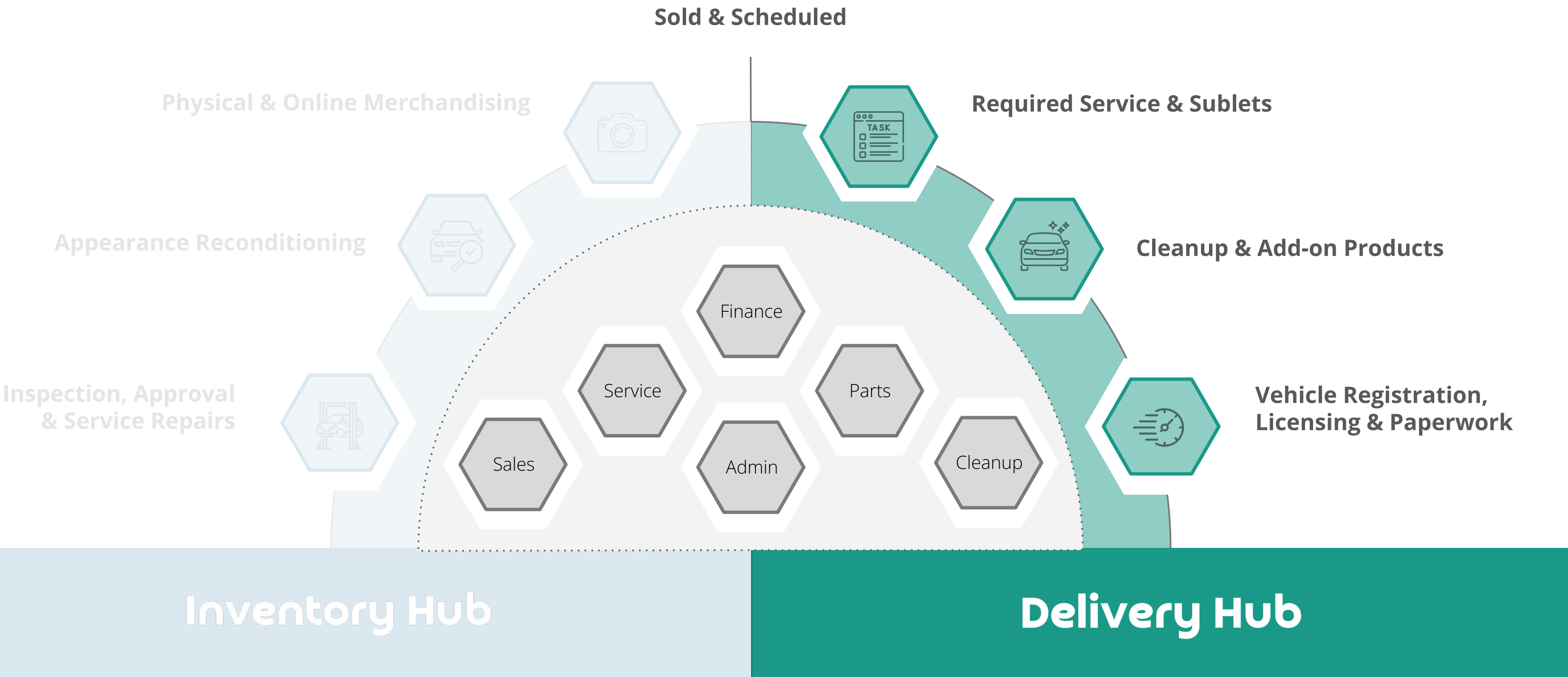
Delivery Hub

JUMP START GUIDE FOR USERS

FASTER CUSTOMER READINESS



Thank you for choosing Delivery Hub as your trusted solution for managing sold vehicle preparation! These next pages will guide you through system concepts.

As always, if you have any questions or ideas please do not hesitate to contact us - support@dealerbydesign.ca

New User Video

get.dealerbydesign.ca/newuser

Book Online Training

get.dealerbydesign.ca/training

When added to the system as a user, you will receive a Welcome email - **be sure to click the** Sign In Now **button to validate your account and set your password.**

If you do not validate your account, you will not be able to login - even if you reset your password.

Didn’t receive the Welcome email?

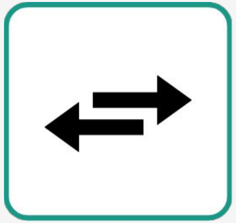
Check spam, then ask an Admin user to ‘Resend Validation’.

This button will be available to them in User Management

CORE CONCEPTS

DELIVERY CARD

Each card represents and communicates the details and status of a delivery. Clicking a card will open up the Delivery Deal Jacket



TRADE IN TRACKER

On the dashboard, under your logo, is a one-click way to see what is coming in as trade-ins

TASK LISTS

Create or modify task lists, by department or position, to organize the many tasks required to get a vehicle ready for the customer

STATIC TASKS

These tasks appear on every scheduled delivery and are configured directly to a task list

DYNAMIC TASKS

These appear as needed as they are based on form selections. Dynamic tasks are configured on a form item instead of a task list

CONDITIONAL TASKS

These tasks appear based on specific details of a delivery

E.g. Vehicle Type [If New.., If Used..] or Deal Type [If Finance.., If Lease..]

FORMS

The tabs available when editing a delivery, configurable by you, and made up of sections and items (checkbox, text field, or list)

FIRST & SUB LEVEL FORM ITEMS

When you add a form item to a section, it’s called a first level form item. Any items you attach to that item would be a sub level item.

HISTORICAL AUDIT LOG

The log of changes available for each delivery to determine timelines. From the Deal Jacket View, Sub-Header Bar, click Options → History

WATCHLIST

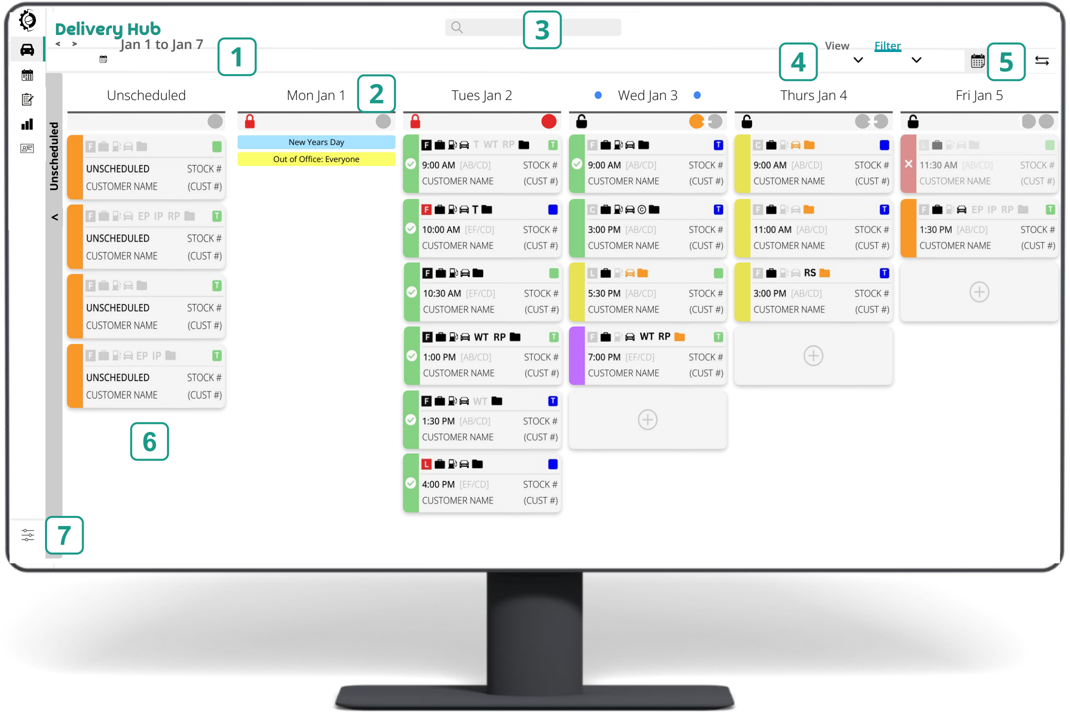
The users or roles attached to a delivery for notifications purposes.

USER SETTINGS

In the bottom left menu, where you can modify user specific settings. Here you can get an iCal link to export your deliveries to a calendar

VIEW DASHBOARD

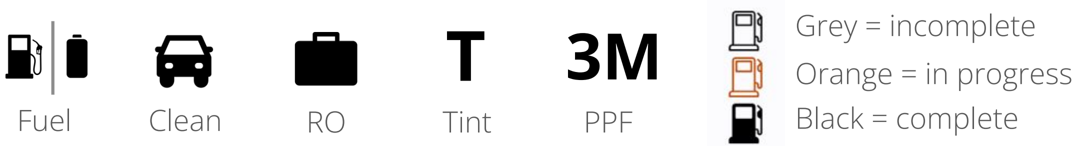
1. Week / Calendar Selection
2. Day Controls (Lock, Notes)
3. Search (Stock, VIN, Name)
4. View Options & Filters
5. Trade In Tracker
6. Unscheduled Column
7. Main Menu



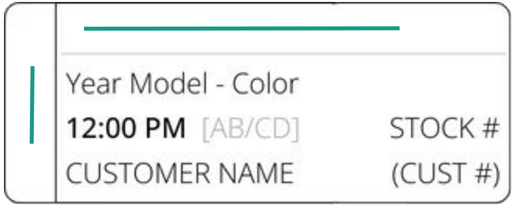
DELIVERY CARD

The Delivery Card is the heartbeat of the Dashboard, providing users with the information they need, regardless of position

It is configurable to display pertinent details. To learn about your specific setup, view the LEGEND in the bottom left corner of the dashboard



Taskbar icons represents a single task, with colour as status



Task stage represents the status of groups of tasks

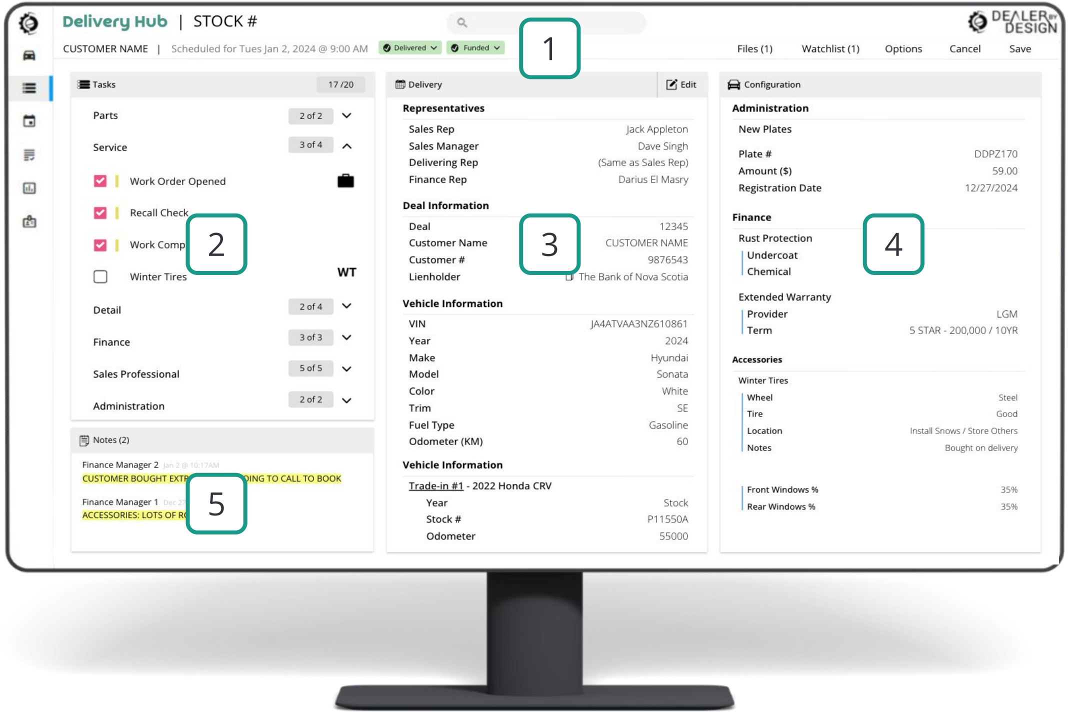
Newly scheduled	Pending complete	Pending 2 complete	Ready complete	Post tasks still to do	Delivered & complete

Symbols that will appear inside the colour bar

✔ Delivered ✗ Cancelled ? Held Up

VIEW DEAL JACKET

1. Sub-header Menu Bar
2. Active Task Lists
3. Vehicle & Deal Details
4. Delivery Configuration
5. Notes (instead of emails)



STEP 1

FINDING A DATE & TIME

When a deal is ready to be scheduled for delivery, head to the dashboard and select the + at the top or + at the bottom on the desired day

- → Use filters to see exactly what you want; like just your deliveries!
- → If a date is not known, use the 'Unscheduled' column
- → Don't see the buttons to add a delivery? The day is likely locked!
- → Dates can be locked due to time or volume limits, or manually
- → If a date is locked, deliveries cannot be added but can be moved off

Access to day controls, like lock and notes, requires the Calendar Admin user role

Not sure if a delivery has been scheduled or need to find one? **Try the Search bar!**

STEP 2

ADD TO THE CALENDAR

Once the day is selected, adding the details is quick & easy

1. Fill in the required information on the Overview tab
2. Complete information the other tabs, like Accessories, as necessary
3. Click Done to review the Deal Jacket. Click Edit if changes are needed
4. Add notes and attach files (images, PDFs, videos), as necessary
5. Click the Save button. Notifications will be sent out as per dealership setting

In setup, dealerships can configure instant or batched notifications at a set interval

If you want to see who will be notified, click Watchlist in the Deal Jacket subheader menu

STEP 3

COMPLETE TASKS

Once added, departments are to start completing their assigned tasks. As managing tasks can be complex, status is communicated several ways:

→ Tasks can be grouped together so when all are completed it changes the left side of the delivery card; the stage status

→ Tasks can have an icon on the delivery card, top bar. Colour provides status:

Incomplete (Grey/outlined) In-Progress (Orange/outlined) Complete (Black/filled)

for *staged* tasks only

→ Filter the dashboard by task list completion status, where deliveries with outstanding tasks in that list are highlighted, and greyed out if complete

Need to let others know something? Skip the email chain and leave a note instead!

STEP 4

MARK AS DELIVERED

When the customer takes possession of the vehicle, navigate to the Deal Jacket sub-header menu and change the dropdown selection from 'In Stock' to 'Delivered.' This will place a checkmark on the delivery card. If the deal is canceled or delayed, additional status options are available.

✔ Delivered ✕ Cancelled ? Held Up

After delivery, there may be post-sale tasks to complete. If required, the status stage will turn blue. Once all tasks are finished, the status bar will turn gray.

There are other things you can track in the sub-header menu, like funding!

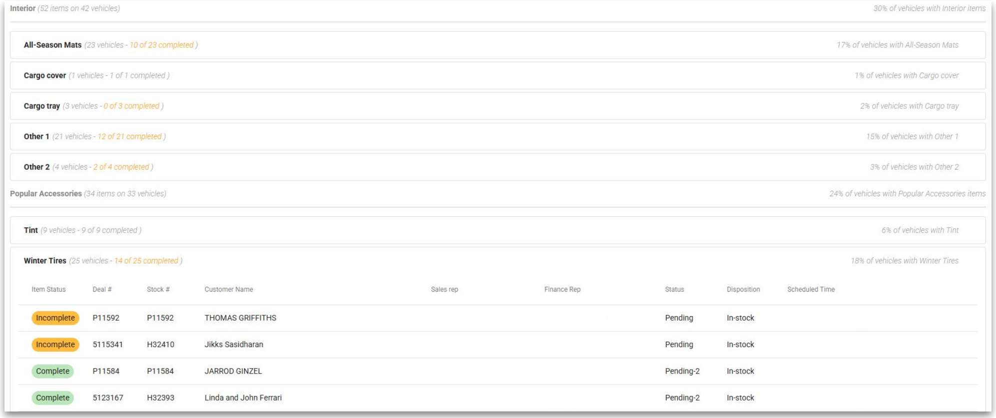
REPORTING

One of the benefits of having a single source of truth for the dealership is the reporting that is possible, based on all the data

Predefined reports for:

- Volume reports, monthly or yearly
- Form usage, by month

Need a custom report? Let our support team know



Interior (52 items on 42 vehicles) — 30% of vehicles with Interior items

All-Season Mats (23 vehicles - 10 of 23 completed) — 17% of vehicles with All-Season Mats

Cargo cover (1 vehicles - 1 of 1 completed) — 1% of vehicles with Cargo cover

Cargo tray (3 vehicles - 0 of 3 completed) — 2% of vehicles with Cargo tray

Other 1 (21 vehicles - 12 of 21 completed) — 15% of vehicles with Other 1

Other 2 (4 vehicles - 2 of 4 completed) — 3% of vehicles with Other 2

Popular Accessories (34 items on 33 vehicles) — 24% of vehicles with Popular Accessories items

Tint (9 vehicles - 9 of 9 completed) — 6% of vehicles with Tint

Winter Tires (25 vehicles - 14 of 25 completed) — 18% of vehicles with Winter Tires

Item Status	Deal #	Stock #	Customer Name	Sales rep	Finance Rep	Status	Disposition	Scheduled Time
Incomplete	P11592	P11592	THOMAS GRIFFITHS			Pending	In-stock	
Incomplete	5115341	H32410	Jikks Sasidharan			Pending	In-stock	
Complete	P11584	P11584	JARROD GINZEL			Pending-2	In-stock	
Complete	5123167	H32393	Linda and John Ferrari			Pending-2	In-stock