

Delivery Hub

Setup Overview



Delivery Hub

SETUP GUIDE

1

Meeting: Intro + Demo

get.dealerbydesign.ca/demo

2

Form: Business Onboarding

get.dealerbydesign.ca/signup

3

Meeting: 1 Hour Kickoff + Q&A

Time & date set during step 2

4

Launch the Delivery Hub

Adding and training new users takes just minutes

Preparing for the Kickoff Call

- **How to prepare?**

We recommend completing the form at get.dealerbydesign.ca/setup to allow for more training time during the Kickoff Call, as we are able to do additional set up prior to. If the form is not completed, Settings overview may take additional time due to Q+A

- **Who should be present?**

All staff members should be present that are involved in the delivery process. If it is not possible to get all staff into a single meeting, we can arrange groups. We can also schedule individual training sessions for those that cannot attend.

Kickoff Call Agenda

- 1. Delivery Hub overview - 5 minutes**

The first portion of the meeting will be introducing the product to those that were not in previous demonstrations, to assist with 'end-user buy-in'

- 2. Review the new delivery flow - 15 minutes**

We will show how a delivery is entered into the system, updated and completed

- 3. Settings overview - 30 minutes**

We review the systems task and form settings, along with providing an admin user level understanding of the system. *All users do not need to be present for this portion*