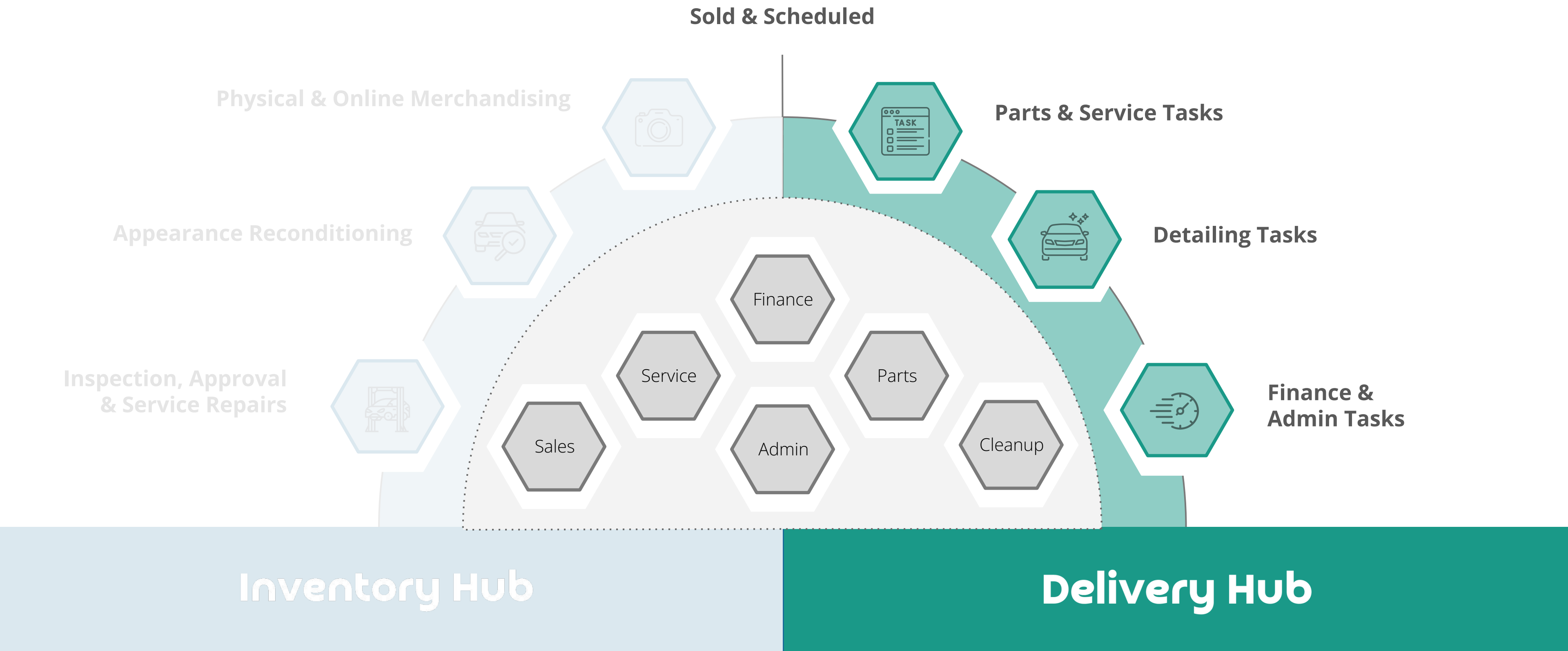
Delivery Hub

QUICK START GUIDE FOR USERS

DELIVERY HUB = FASTER DELIVERY



Thank you for choosing Delivery Hub as your go-to solution for faster sold vehicle delivery! 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 or through the customer portal.

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

WHAT'S AHEAD

CORE CONCEPTS

Foundational ideas behind how Delivery Hub works and why it matters.

KEY FEATURES + UI CALLOUTS

High-level overviews of major features followed by visual breakdowns.

KEY ACTIONS + WALKTHROUGHS

Explanations of core user actions paired with step-by-step instructions.

CORE CONCEPTS

DELIVERY

A central file that tracks everything to complete the process of sold vehicle get-ready, like “we owe”, so nothing is missed

TASKS

The things to do for each delivery required to be considered a success and complete. Each delivery can have different tasks assigned

TASK LISTS

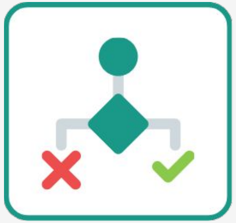
Create or modify task lists, by department or position, to organize the many tasks required to get a vehicle ready for the customer

TASK TYPE: STATIC

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

TASK TYPE: DYNAMIC

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



TASK TYPE: CONDITIONAL

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..]

TASK STAGE STATUS

Tasks can be grouped. When a group is completed, stage status changes

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

FORMS

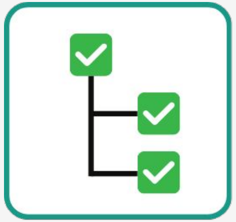
The tabs available when adding or editing a delivery, configurable by you, and made up of sections and items (checkbox, text field, or list)

FORM: SECTION

When viewing a form, the selectable items of each will be organized into Sections. Example: *Interior* and *Exterior* for the Accessories Form

FORM: FIRST LEVEL ITEMS

When you add a form item to a section, it's called a first level form item. Most are setup as a checkbox, but can also be a list or text field



FORM: SUB LEVEL ITEMS

These are the fields that appear when a first level item is selected. Sub level items are configurable to capture pertinent information

KEY FEATURES + UI CALLOUTS

DELIVERY DASHBOARD

Displays a calendar view of deliveries. One week on desktop, one day on smaller screens

DELIVERY CARD

For each scheduled Delivery, a Delivery Card displays a summary of tasks and deal information on the Delivery Dashboard

DELIVERY DEAL JACKET

Displays the details of deal information, tasks and forms, as well as notes, files, and history

HISTORY

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

TRADE IN TRACKER

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

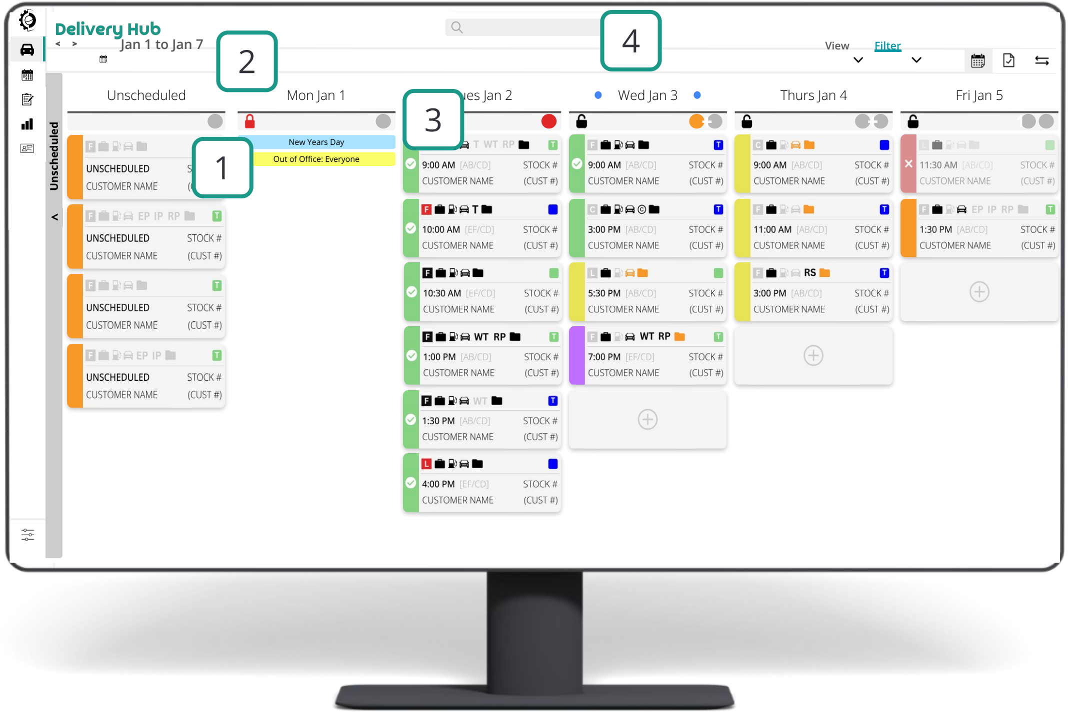
DELIVERY
DASHBOARD

1 **Delivery Card**, hover over a taskbar icon to learn more or click to open the Deal Jacket

2 **Calendar Selection**, navigate week to week or select a specific time to jump to

3 **Day Controls**, atop each day is a lock, notes, and counter. Usable by permissioned users

4 **Search**, easily find a delivery by searching by stock, VIN, or name associated



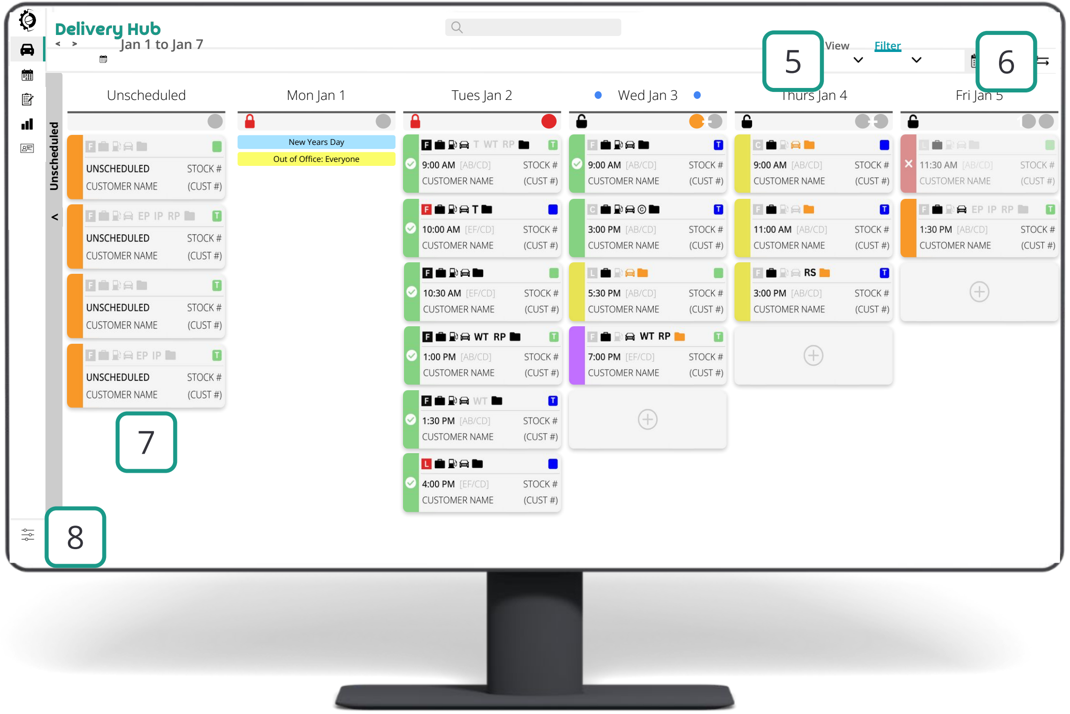
DELIVERY **DASHBOARD**

5 **View Options**, turn on filters to narrow down what is displayed on-screen

6 **Trade In Tracker**, dashboard view to see the attached trade-ins to deliveries

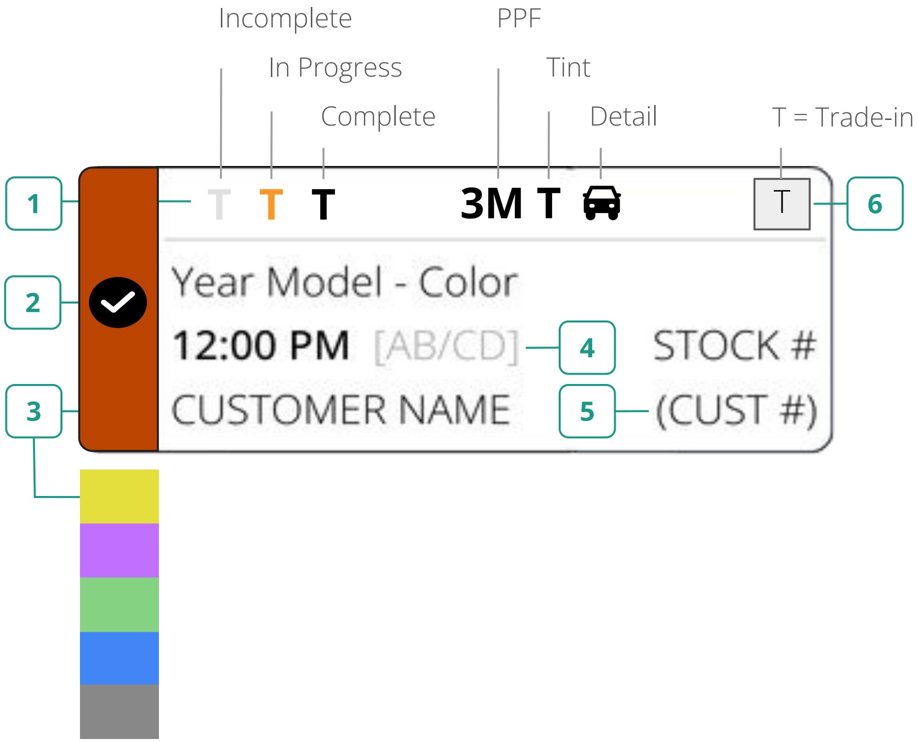
7 **Unscheduled,** deliveries without dates are scheduled here. Rolling week-to-week

8 **Main Menu & Legend**, has access to user settings, and the knowledge base for help



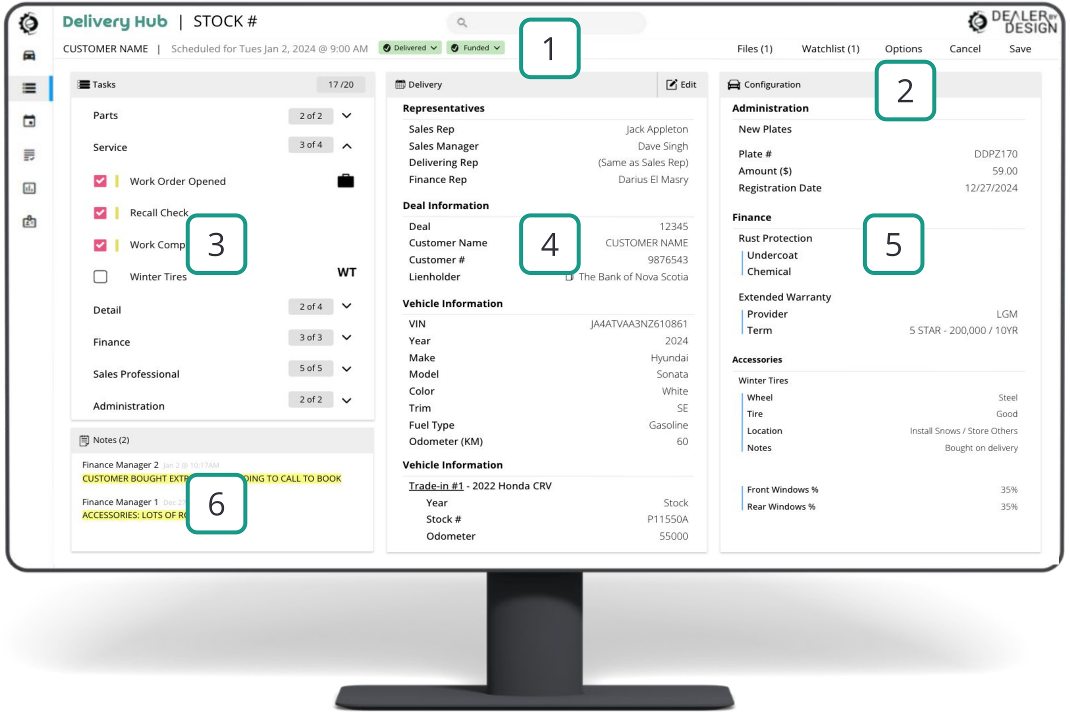
DELIVERY
CARD

1. **Taskbar icon**, each icon can represent a single task, with colour as status
2. **Delivery status,** symbol that appears inside the colour bar when changed from 'In-stock'
3. **Task stage status**, which group of tasks are complete
4. **Employee Initials** of the sales & finance rep involved
5. Configurable data display
6. **Delivery Type Colour**
   New, Used, Demo, Fleet



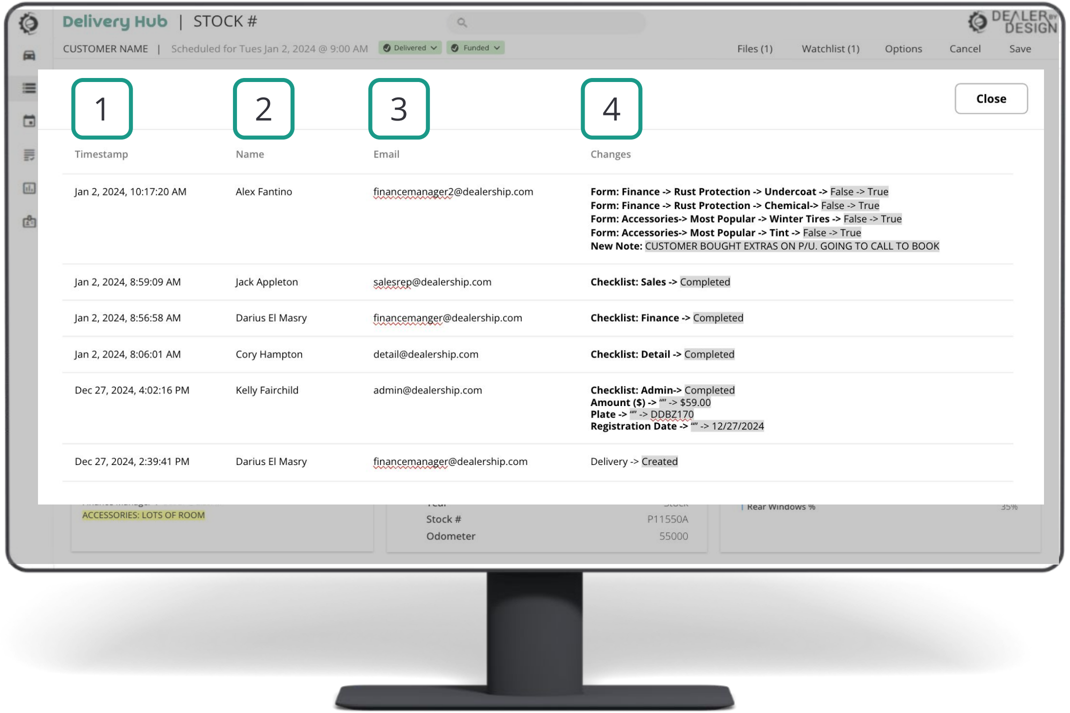
DELIVERY
DEAL JACKET

1. **Delivery & Funding Status**, easy to change dropdowns
2. **Options->History,** tracks edits creating accountability
3. **Task Lists,** where static, conditional and dynamic tasks are organized
4. **Delivery Details**, information from the Overview form
5. **Configuration Details**, the summary of all selected and entered form items
6. **Notes**, easily communicate here instead of emails



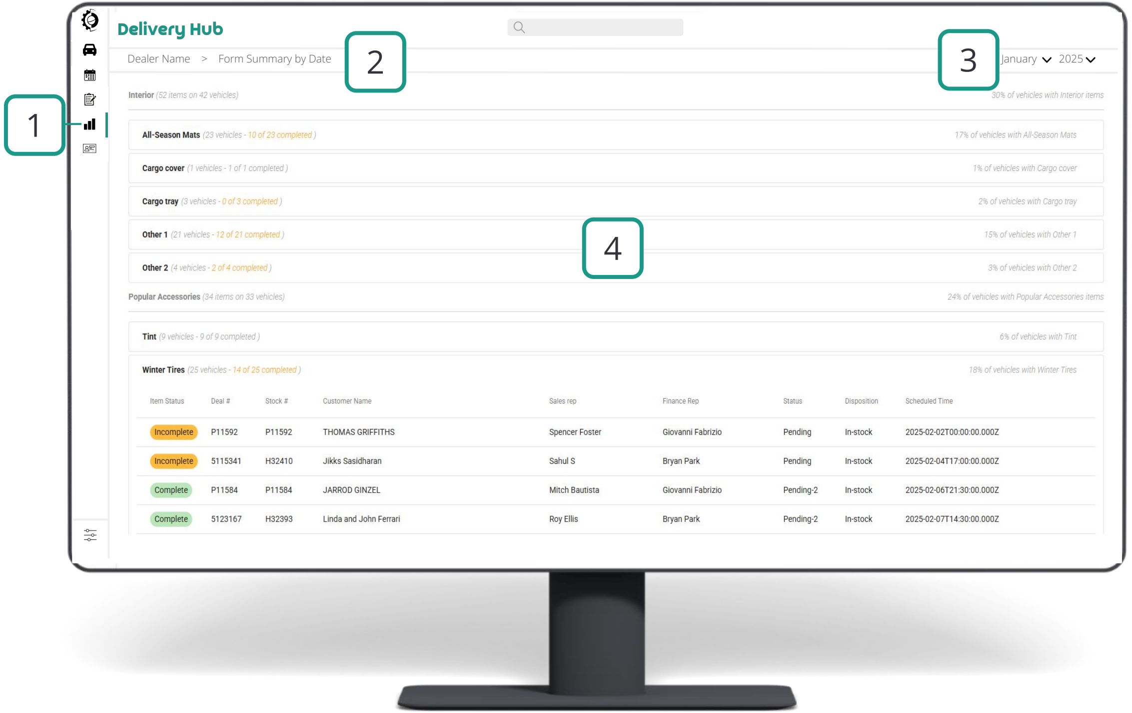
DELIVERY **HISTORY**

1. **Date/Time**, when a user saves an edit to a delivery
2. **User**, the user profile that saved the edit
3. **Email**, the associated email to the User
4. **Changes**, the logged edits per save. This shows what has been added or removed



REPORTING

1. **Reporting**, available to users with 'Reporting' permission
2. **Report Type**, choose the report type to view
3. **Report Date**, select the date range to view
4. **Report**, the system will provide a real-time report



KEY ACTIONS + WALKTHROUGHS

SCHEDULING A DELIVERY

Finding an open date on the calendar (or the unscheduled tray) to add the delivery and using the + button to start.

ADDING DELIVERY DETAILS

Easily add delivery information on the Overview and other Forms, or leave notes and attach files as necessary.

PREPARING A DELIVERY

Once scheduled, the task lists will be prefilled with the work that needs to be done. Complete all tasks and tick off to signal completion.

COMPLETING A DELIVERY

Once the vehicle is in the hands of the customer, simply change one dropdown to signal delivery completion.

POST DELIVERY ACTIONS

The process of closing a deal doesn’t end at the delivery, track post delivery tasks to ensure nothing is left unfinished.

NEXT UP: STEP BY STEP INSTRUCTIONS

SCHEDULING A DELIVERY

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!

ADDING DELIVERY DETAILS

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

PREPARING A DELIVERY

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

→ Tasks can have an icon on the delivery card taskbar. Colour provides status:

Incomplete (Grey/outlined) | In-Progress (Orange/outlined) for *staged* tasks only | Complete (Black/filled)

→ 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!

COMPLETING THE DELIVERY

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

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

POST DELIVERY ACTIONS

After delivery, there may be post-sale tasks to complete. If post tasks are present to complete, the task status stage will turn blue. Then once all tasks are marked completed, the delivery card task status bar will turn grey.

Note: Post tasks (blue) shows up when there are tasks to do, unlike the other colours