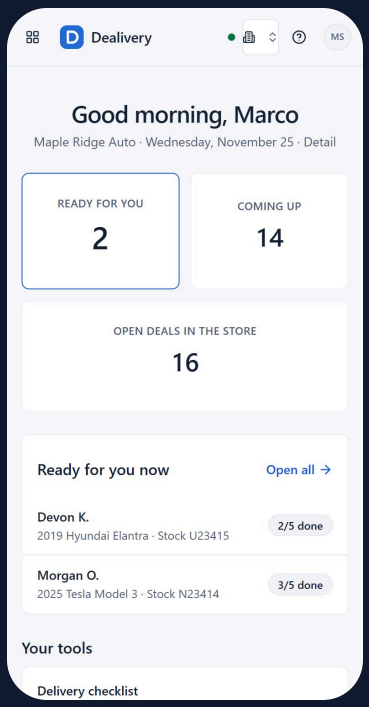
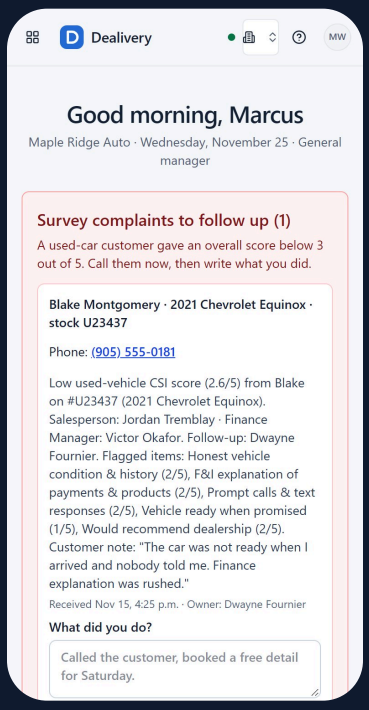
DEALIVERY

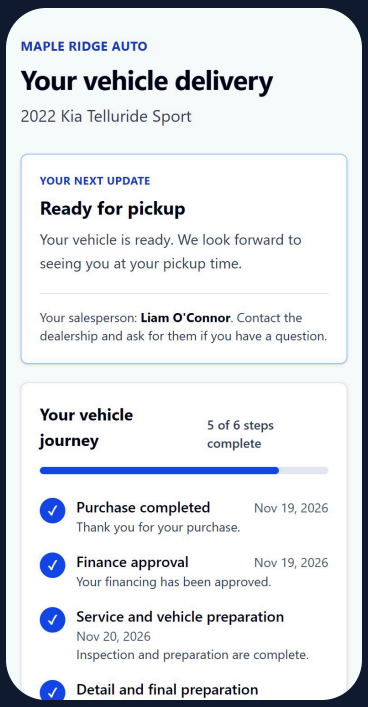
QUICK GUIDE · IN PICTURES

From handshake to keys.

What every person at the dealership sees, and what to tap. Fewer words, more screens.







ONE DEAL, START TO FINISH

Every department sees the next car

When one department finishes, the next one is told automatically. The customer gets a text along the way.

Sold
Manager adds the deal on the Deal Pad

→

Finance
Next finance manager by rotation

→

Service & parts
Safety, recalls, parts

→

Detail
Clean and ready

→

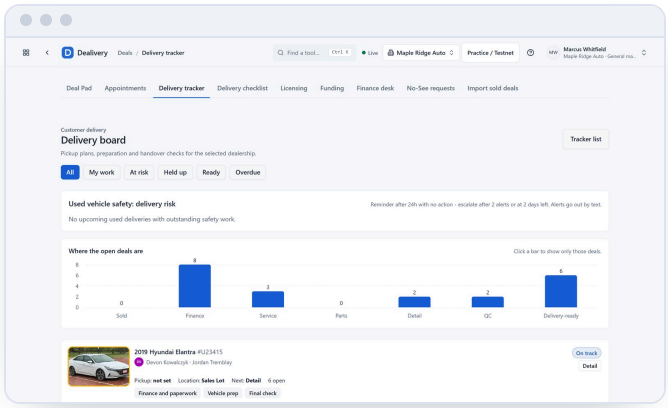
Final check
Quality check before pickup

→

Delivered
Keys handed over

WHAT THE CUSTOMER GETS

- Welcome text naming their finance manager
- Desk QR, then a tracking link once approved
- Live page shows each step
- "Your vehicle is ready" + pickup date
- Thank you + review link



One record per deal. Everyone works on the same one.

The salesperson, finance, service, detail and the GM all look at the same deal. Nobody re-types it, and nobody has to ask where it is.

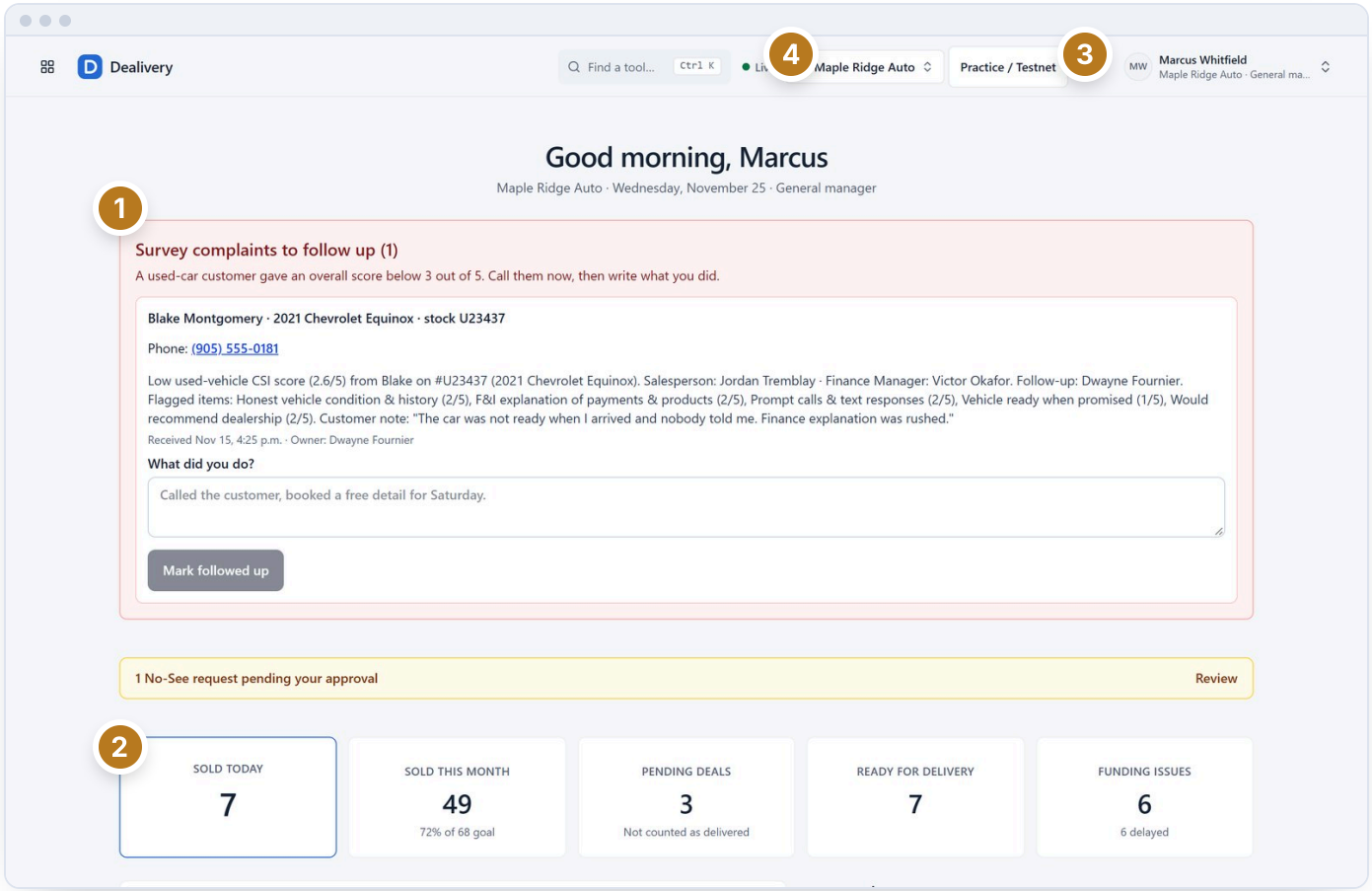
Safety · Held up · On track

Problems show as a coloured tag on the car, so they're seen right away.

THE HOME PAGE · GENERAL MANAGER

Problems first, then the numbers

Every person opens the same app. The home page shows only their own work.



1 Needs you now
Unhappy customers, held-up cars, missed pickups.

2 Today's numbers
Sold, pending, ready, funding problems. Tap one to see the list.

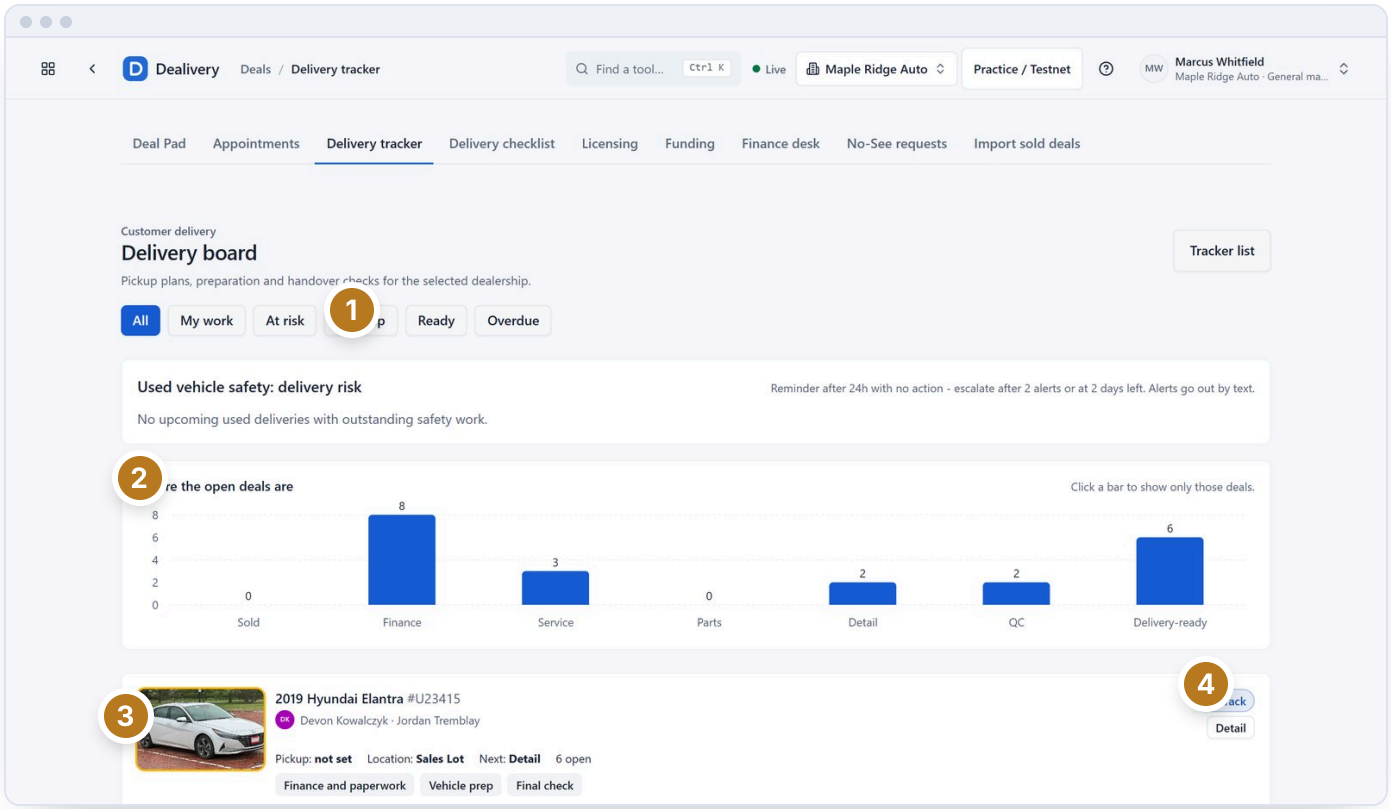
3 Help
The question mark sends a question to the Dealivery team.

4 Your store
Groups with several stores switch here.

📱 **Works on any phone, tablet or computer.** Nothing to install. Staff sign in with their work email.

DELIVERY BOARD

Every open deal on one screen

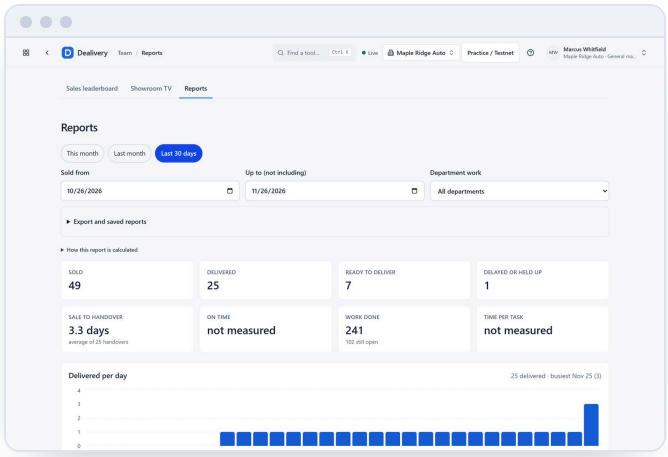


1 Filter
At risk, held up, ready, overdue.

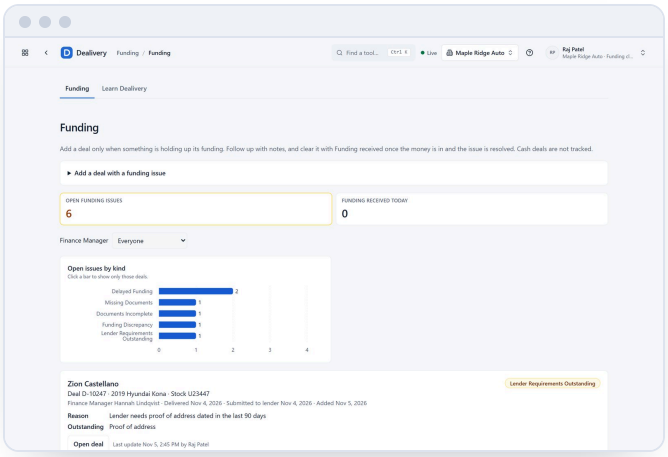
2 Where deals are
Tap a bar to see only those cars.

3 Each car
Customer, salesperson, pickup, and which department is next.

4 Status
On track, held up, or overdue.



Reports · the month at a glance, ready to print

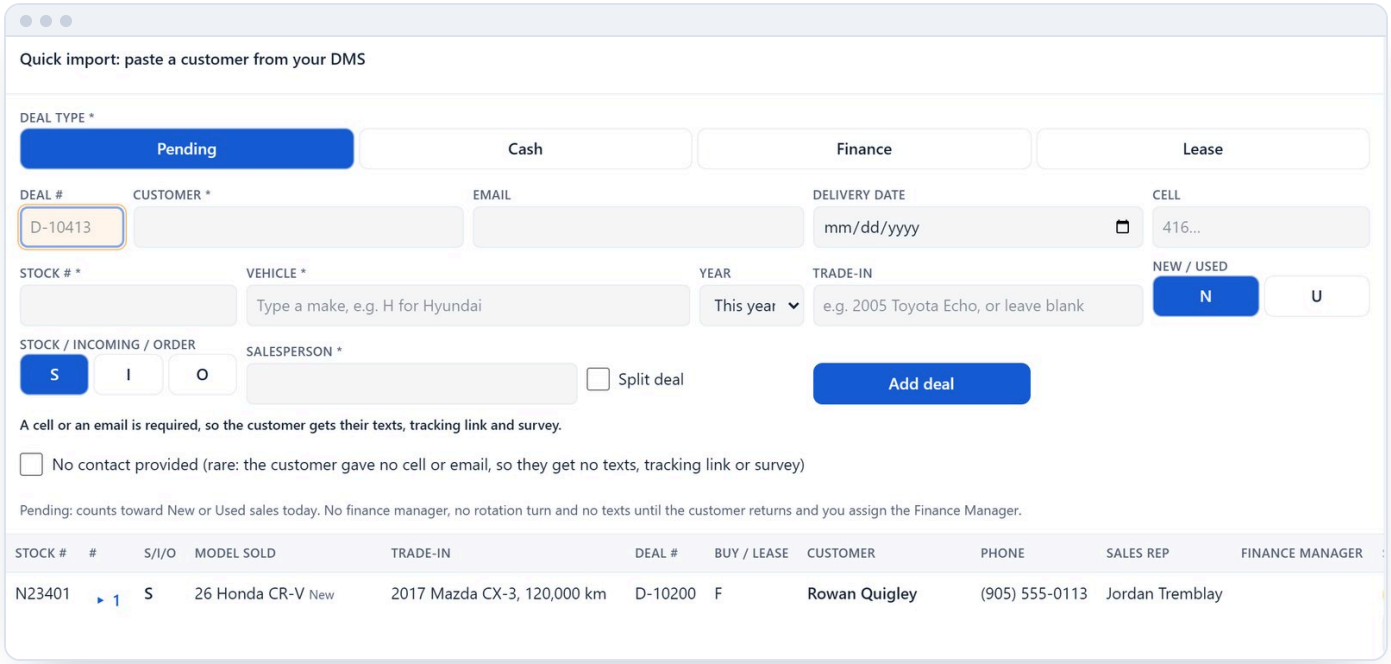


Funding · only the deals with a problem

DEAL PAD

Today's deals, entered once

The sales manager enters the sold deal. Everything else starts from here.



1 Add the deal

Deal # fills itself. Enter moves box to box; make, model and year come from a list.

2 Finance is picked by rotation

The next finance manager gets it. No arguing.

3 Used car? Safety opens itself

Safety and recall work orders open for service.

GOOD TO KNOW

- **Pending** deals count toward store sales right away.
- Only the chosen Deal Pad manager removes a pending deal.
- Print or export the day with one button.
- Already have open deals? Bring them in from a spreadsheet.

DEAL BOARD

Your magnetic board, on screen

Same rows, same columns, same stickers. Nobody moves them by hand.



1. **Yellow is new, green is used**
   Deal number, customer and vehicle on every sticker.

2. **Stickers move themselves**
   Pending, In finance, PDI / Service, Ready, Delivered.

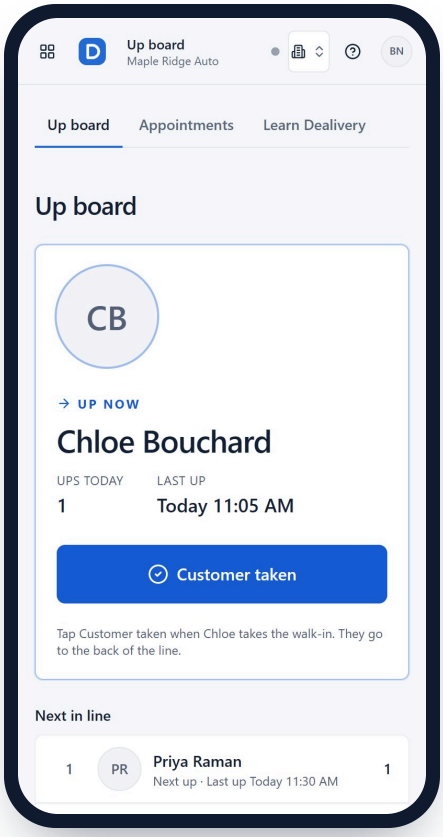
3. **Tap a sticker**
   Salesperson, finance manager and delivery status.

GOOD TO KNOW

- Refreshes itself every 30 seconds. Leave it open on a monitor.
- Delivered keeps the month; the newest show first.
- For managers and finance, like the Deal Pad.

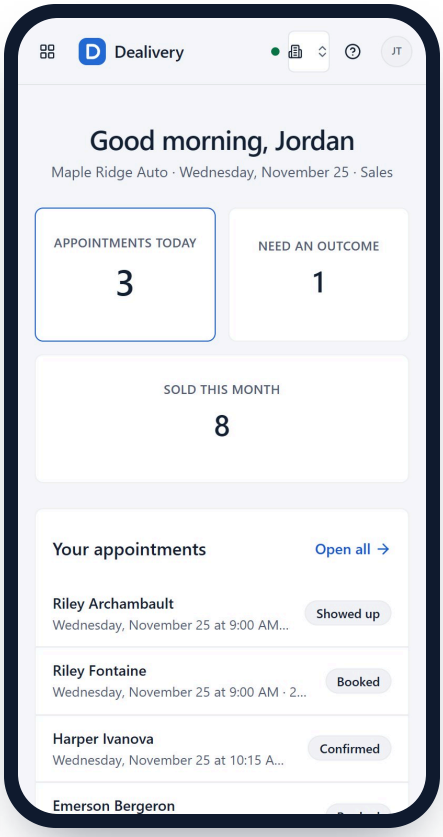
ON THE FLOOR

Who's up, who's selling



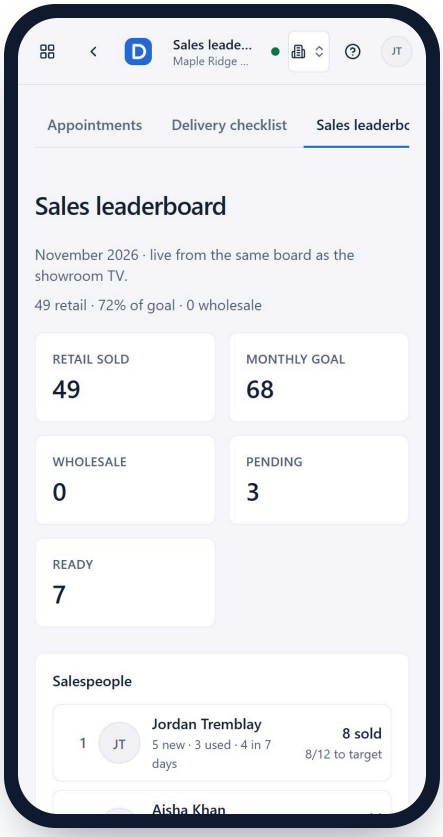
Up board

Reception taps "Customer taken". The next salesperson is up.



Salesperson's home

Today's appointments and their sales this month.



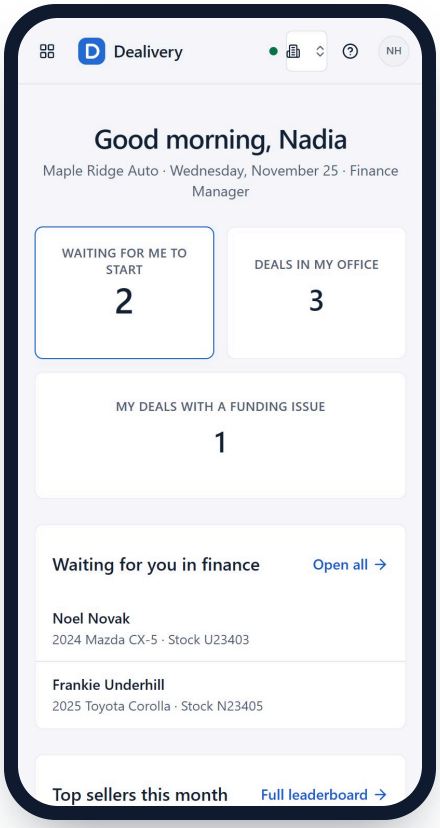
Leaderboard

The same board as the showroom TV.

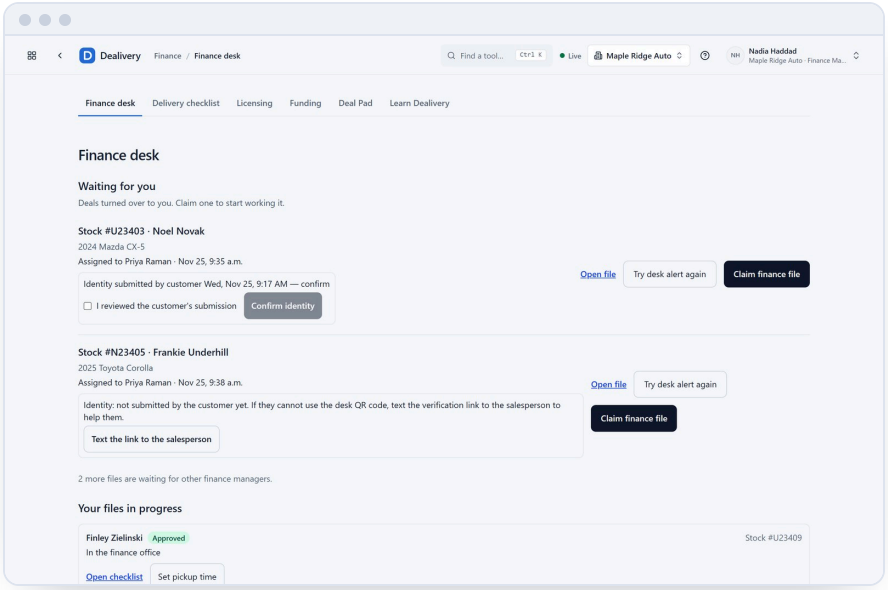
🔒 **Only reception, sales managers and the GM** can move the up board. Salespeople can see it, not change it.

FINANCE DESK

Your deals, your customers, your pickup times



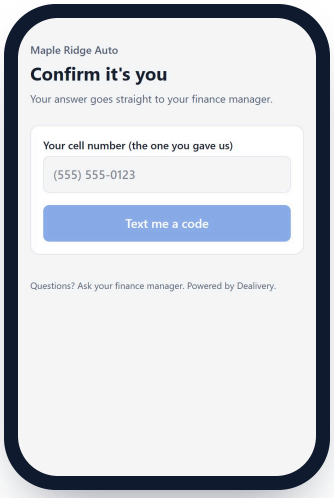
Finance manager's phone



1 Deals arrive by rotation
"Waiting for me to start" shows what's new.

2 Desk QR
The customer scans it and confirms it's them. The answer comes straight to you.

3 Set the pickup time
Save it once. The customer gets it by text right away.

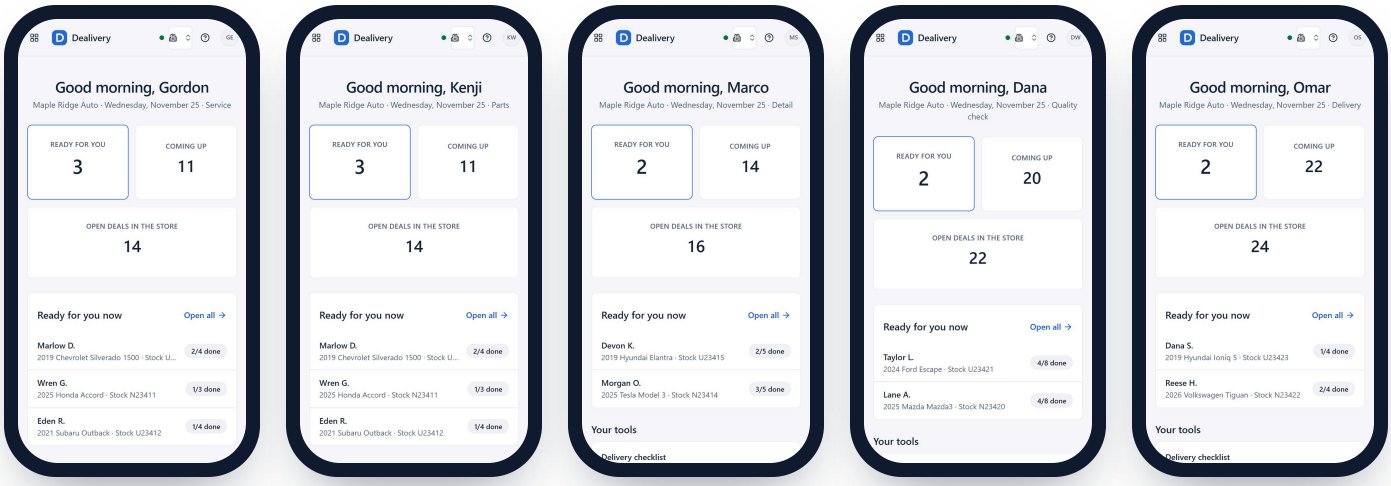


The customer confirms it's them on their own phone. No photocopier, no waiting.

DEPARTMENTS

Ready for you. Coming up. That's it.

Each department sees only its own cars, on its own phone.

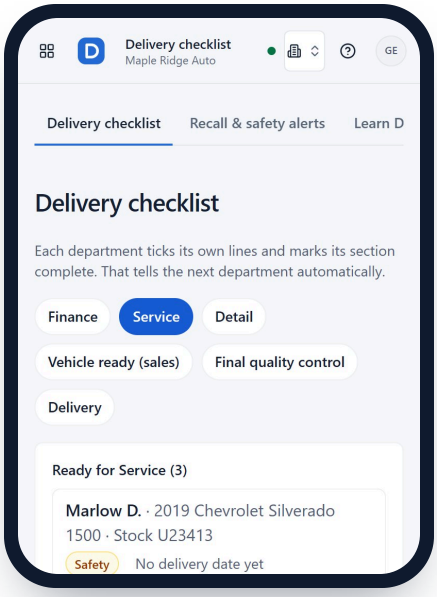


Service **Parts** **Detail** **Final check** **Delivery**

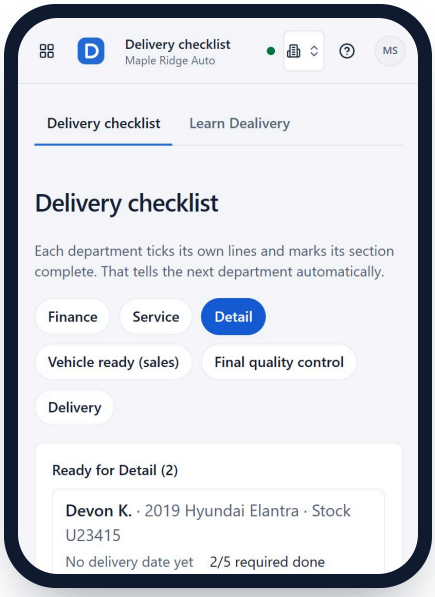
1. **Ready for you**
   Cars waiting on your department now.
2. **Coming up**
   Next in line. You can start early.
3. **Tap a car**
   Tick your lines, then mark your part done.

DELIVERY CHECKLIST

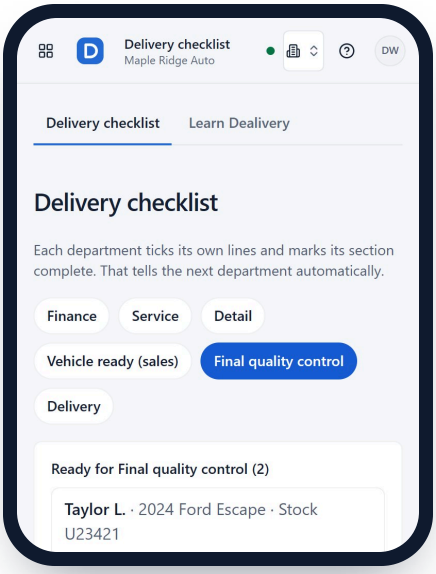
Tick your lines. The next department is told.



Service · a Safety tag means safety work first



Detail · "2/5 required done"



Final check · delivery date on each car

FOUND A PROBLEM?

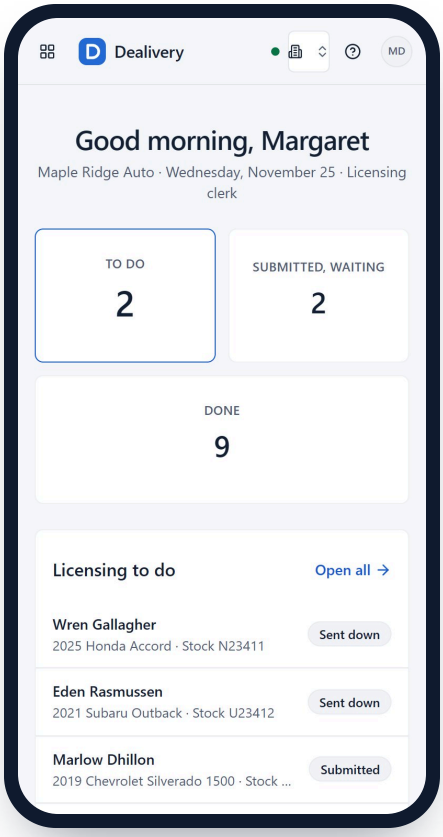
Final check, delivery, finance, the salesperson or the GM report it on the car. A safety problem puts the car on hold (**HELD UP**): it can't be delivered until it's fixed. The salesperson and finance are told.

MARKED DONE

The next department sees the car under "Ready for you". When detail is done, the customer gets the "ready" text with the pickup date.

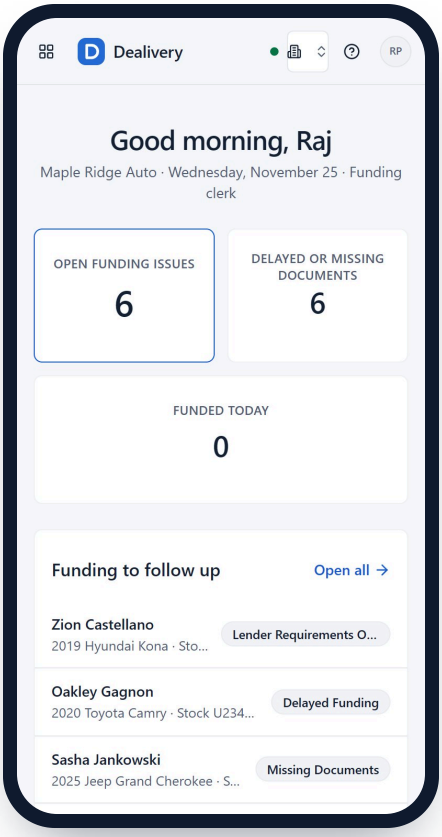
LICENSING · FUNDING · INTERNET SALES

The office sees what's left to do



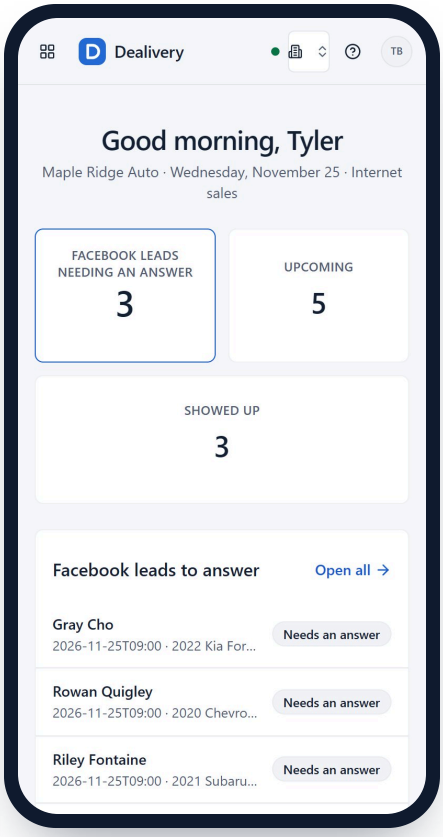
Licensing

To do, submitted, done.



Funding

Open funding problems and missing documents.



Internet sales

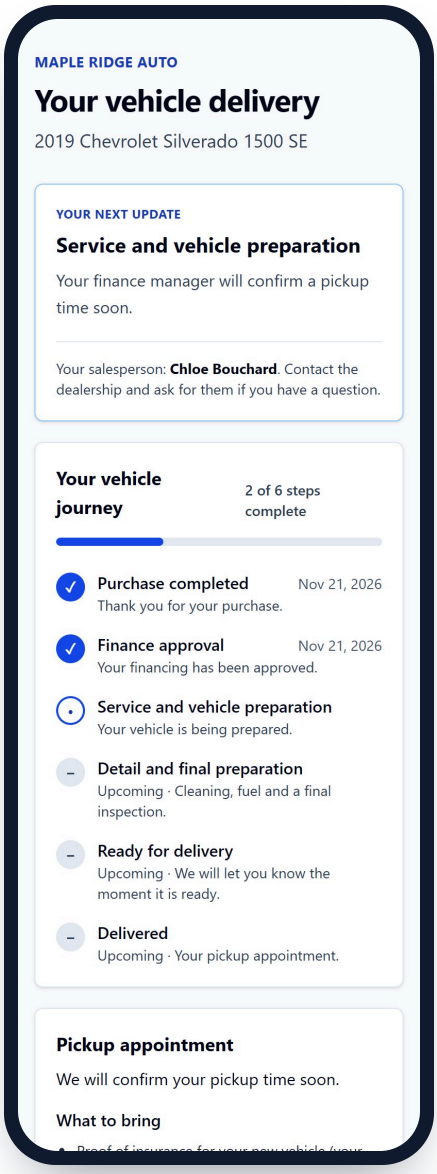
Facebook leads to answer and book.

📣 **Facebook Marketplace** (Deal Pad + Facebook plan): used inventory comes from the store's website, posts to Marketplace, and leads are booked to a salesperson.

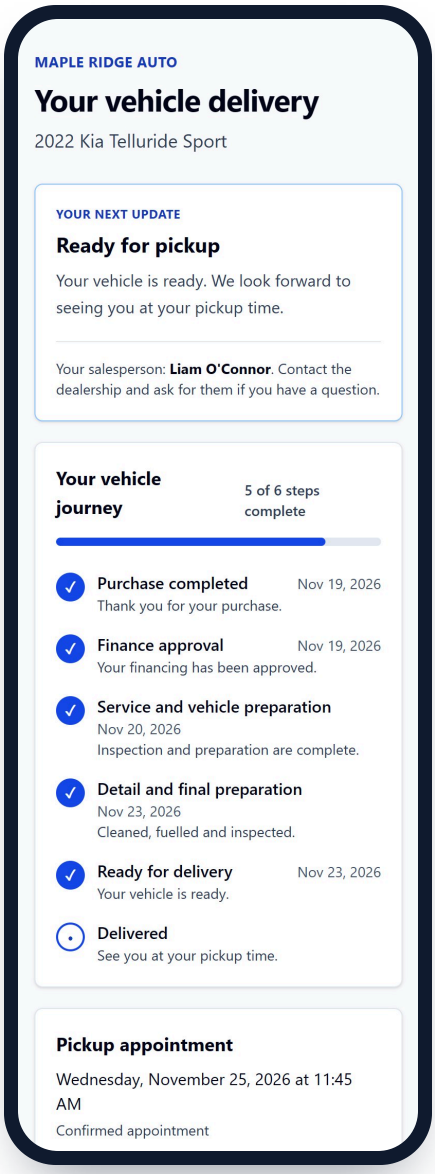
ON THE CUSTOMER'S PHONE

They always know where their car is

No app to download. The link comes by text.



Getting ready · 2 of 6 steps



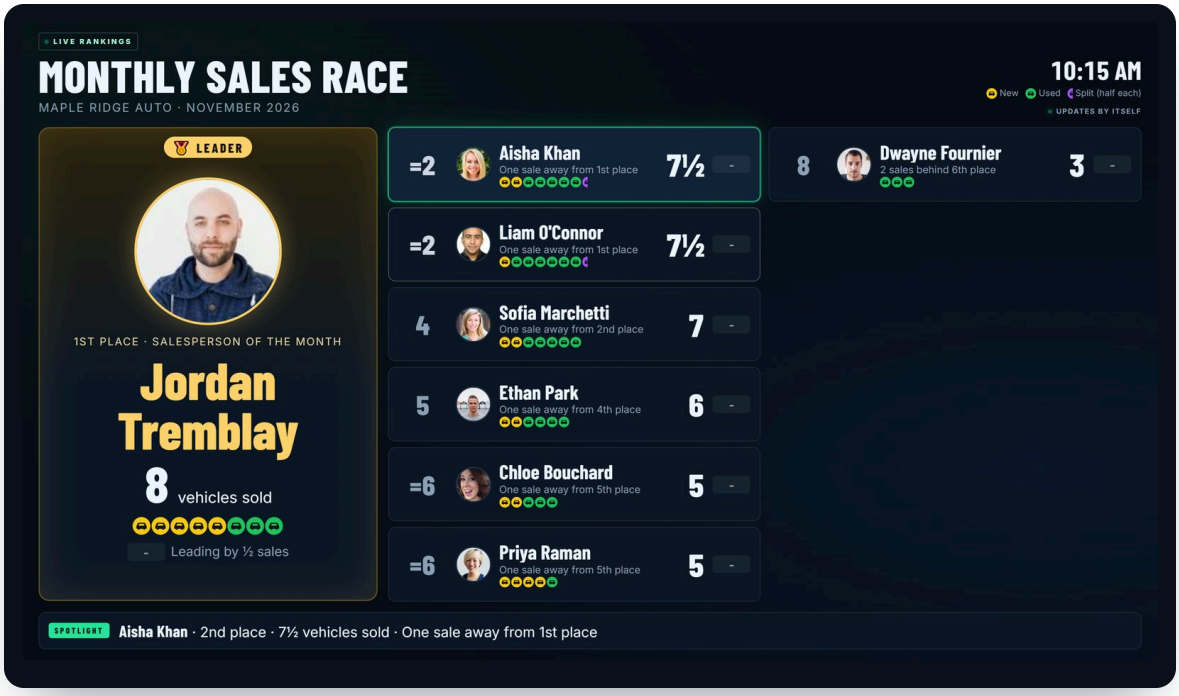
Ready for pickup · 5 of 6 steps

1. **Next update**
   What's happening now, in plain words.
2. **Their salesperson**
   Who to ask, by name.
3. **The journey**
   Each step ticks off as the car moves.

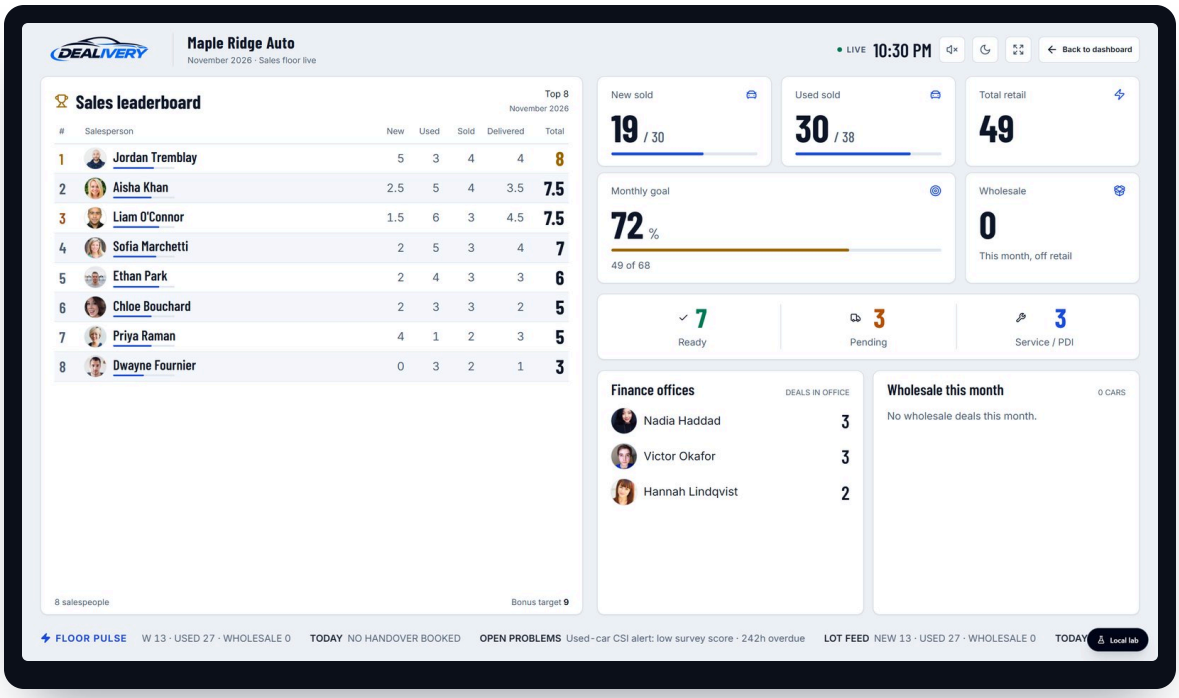
After delivery: a thank-you text and the store's review link. Used-car buyers get a short survey 24 hours later.

ON ANY TV WITH A BROWSER

The month, live on the showroom wall



Monthly sales race · updates by itself as deals are entered



Sales floor · leaderboard with Sold and Delivered, goal, ready and pending cars, finance offices

STUCK?

Help is one tap away

The question mark

At the top of every screen. Ask the Dealivery team anything.

Learn Dealivery

On every home page. Your day, step by step, for your job.

Email and phone

Business days, 8 to 5 Eastern. Same-day reply.

dealivery.ca

Sign in, or book a demo for another store.

WHO CAN DO WHAT

Set pickup times	Finance, sales managers
Move the up board	Reception, sales managers, GM
Remove a pending deal	The chosen Deal Pad manager
Undo a delivery (within 24 hours)	GM
Report a problem at handover	Final check, delivery, finance, salesperson, GM