

dealivery.ca

D DEALIVERY

Staff card

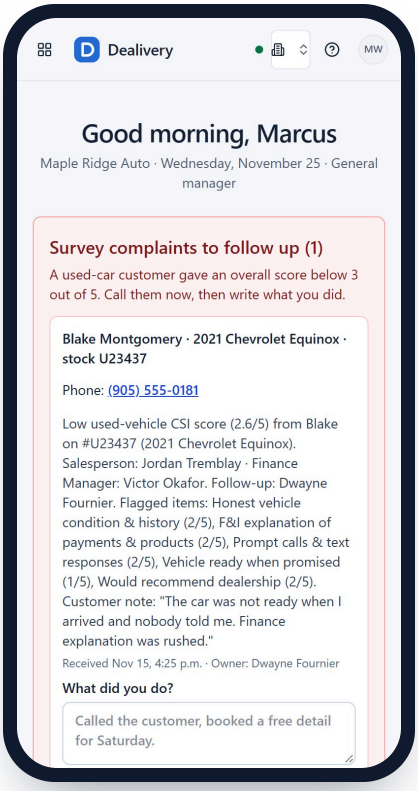
Everyone

Start here

Open **dealivery.ca** on your phone, tablet or computer. Nothing to install.

1. Sign in with your **work email**. A code is sent to it.
2. Your home page shows **only your work**: what's ready for you, what's coming up.
3. Tap **Learn Dealivery** for your day, step by step.
4. Tap the **?** at the top to ask the Dealivery team anything.

Tip Add your cell number in My profile so you get your texts.



D DEALIVERY

Staff card

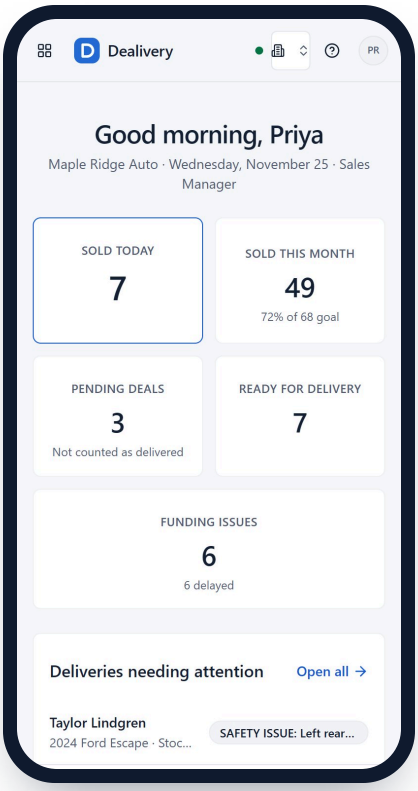
General Manager

You run the store

Watch the numbers, set up your people, step in when a deal is stuck.

1. Check the day: **problems first**, then the numbers.
2. Choose your **Deal Pad manager**.
3. Approve **No-See** requests.
4. Pressed Delivered by mistake? **Undo it** within 24 hours.

You're told about every used-car complaint (score below 3 of 5) and every No-See request.



D DEALIVERY

Staff card

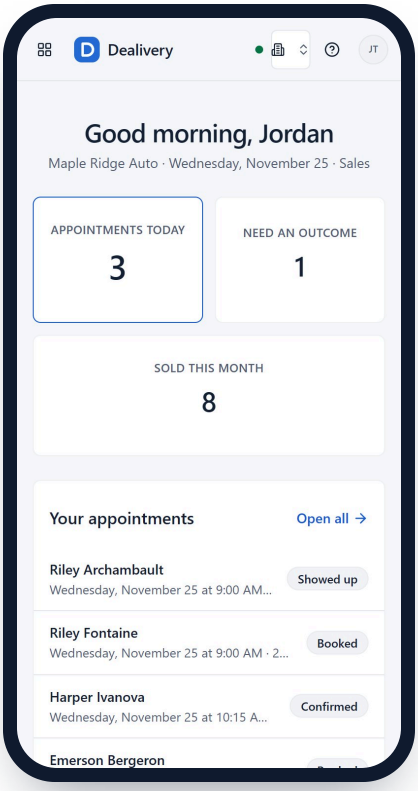
Sales Manager

You enter and assign the deals

Keep the floor moving. Only managers enter or correct deals.

1. **Deal Pad**: enter the sold deal. The deal # fills itself.
2. Finance is picked **by rotation**. The customer gets a welcome text.
3. Customer back? **Assign** the pending deal.
4. Set or change the **pickup time**. The customer is texted.

Good to know The **Deal board** shows every deal as a sticker, moving by itself. Used Car Manager: you also get every used-car survey, and complaints at the same moment as the GM.



D DEALIVERY

Staff card

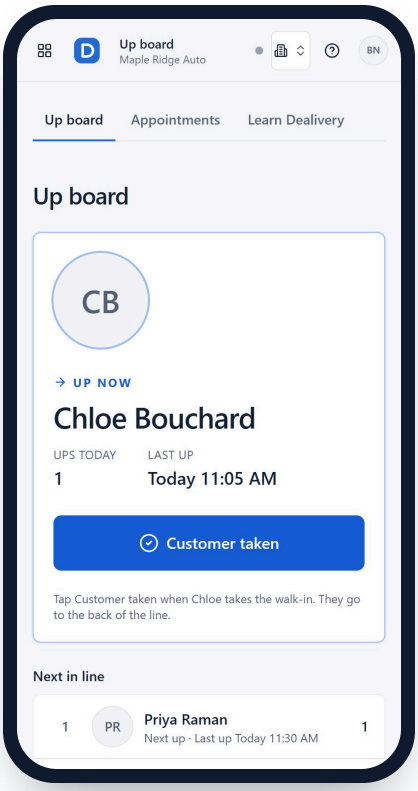
Salesperson

You sell the car and look after the customer

You see only your own customers. Tell your manager about a deal; they enter it.

1. Work your **appointments**.
2. When Detail finishes, **call the customer** to arrange pickup.
3. Tick your lines under **Vehicle ready (sales)**.
4. Pickup day: tick the **Delivery** lines. The thank-you text goes out.

You're told 24 hours before each pickup and again the morning of.



D DEALIVERY

Staff card

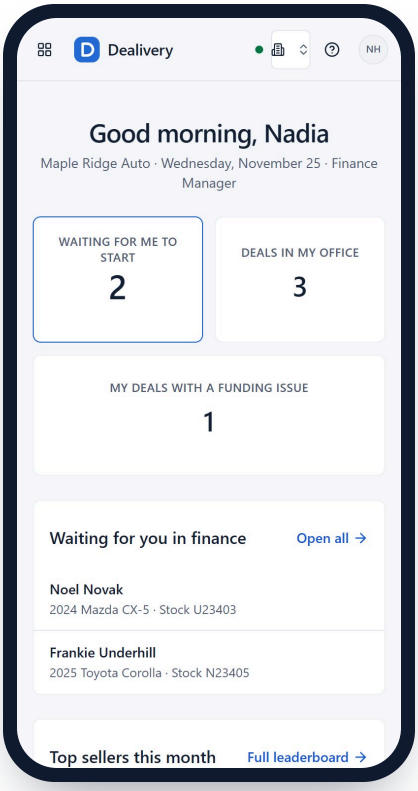
Reception

You run the front desk

Walk-ins go to the next salesperson. You book appointments.

1. Open the **Up board**. The salesperson who's up is shown large.
2. Tell the customer who's meeting them.
3. Press **Customer taken**. They go to the back of the line.
4. **Book an appointment**: name, cell or email, car, time.

Good to know The customer gets a confirmation, reminders, then "Did you attend?"



D DEALIVERY

Staff card

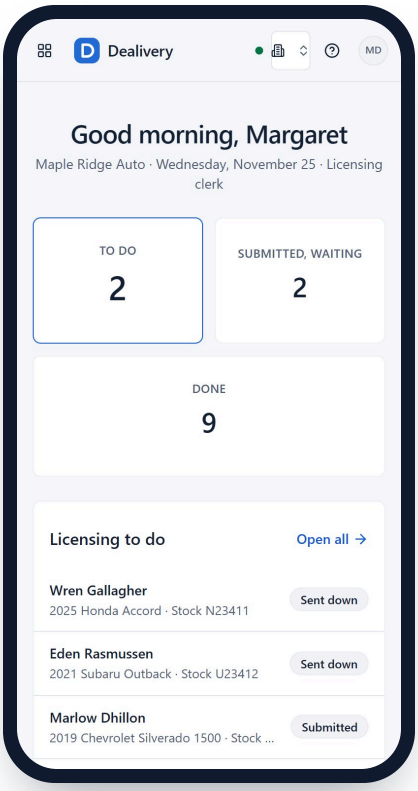
Finance Manager

The customer's contact until delivered and funded

Deals come to you by rotation. Add your cell number first.

1. Open the new file. Setting its status **starts it**.
2. **Confirm who the customer is**: they scan the desk QR, you confirm.
3. Set **Approved**, then **Set pickup time**. The customer is texted.
4. Tick your lines, press **Mark Finance complete**. Service is told.

You're told the moment a deal is assigned to you, and when the customer submits their identity.



D DEALIVERY

Staff card

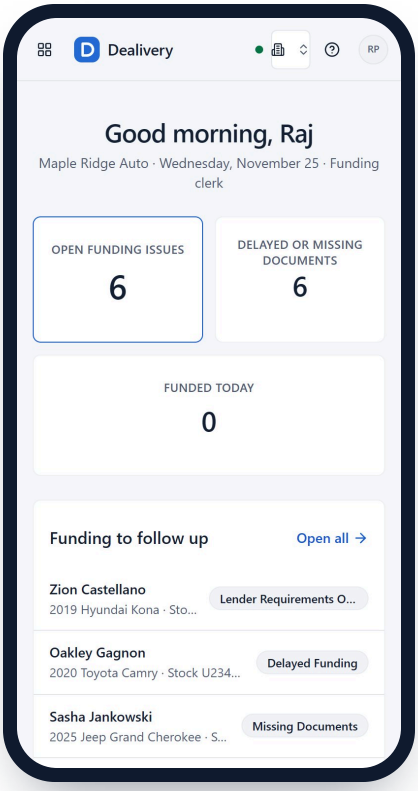
Licensing

Send the paperwork, update the status

One job, one screen: Licensing.

1. See what's **ready for you**.
2. **Send** the paperwork.
3. Mark licensing **complete**. Finance is told.

You're told when a finance manager sends a deal down.



D DEALIVERY

Staff card

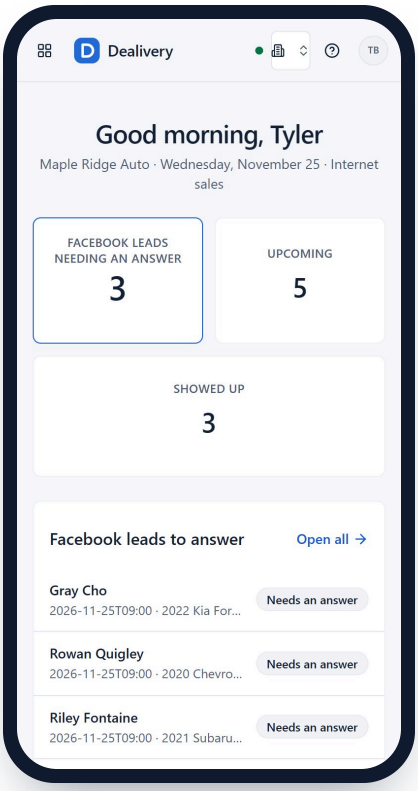
Funding

Chase the lender's money until it's funded

One screen: Funding. Cash deals are not on your list.

1. Work the **outstanding list**.
2. Say **why** a deal isn't funded. Finance is told.
3. Keep a **follow-up note**.
4. Mark the deal **funded**.

Good to know The deal's finance manager is told whenever you record a problem.



D DEALIVERY Staff card

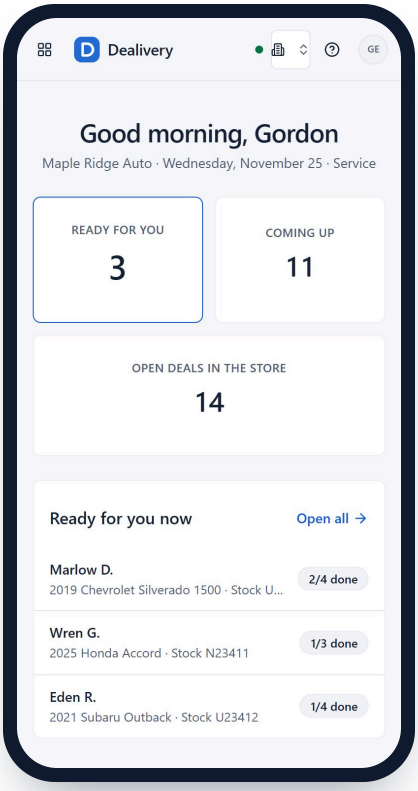
Internet Sales

Facebook Marketplace leads

Answer Facebook customers and book their visit. (Deal Pad + Facebook plan.)

1. **Book** a Facebook customer with a salesperson.
2. **Close the loop** after the visit: showed up or not.
3. **Post cars** on Facebook Marketplace.

Good to know The salesperson you choose gets a notice of the booking.



D DEALIVERY Staff card

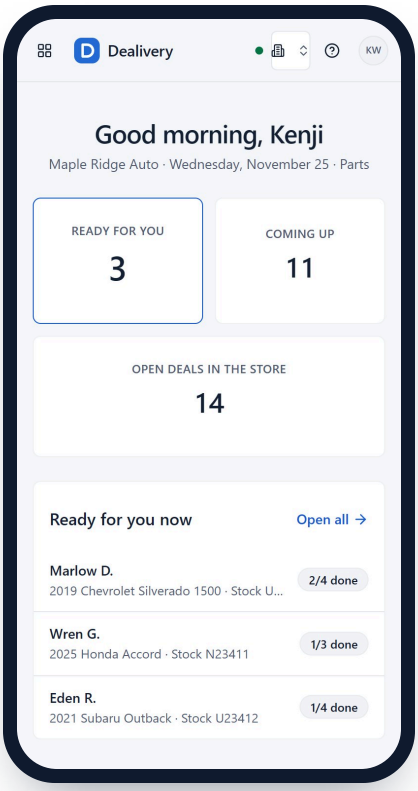
Service

Make the car safe and right

Recall and safety work comes to you the moment a deal is entered.

1. **Recall & safety alerts**: press **Accept**. Reminders stop.
2. Tick your **Service** lines. Safety inspection on every used car.
3. Press **Mark Service complete**. Detail is told.

You're told when Finance completes its section. You can start your lines early.



D DEALIVERY

Staff card

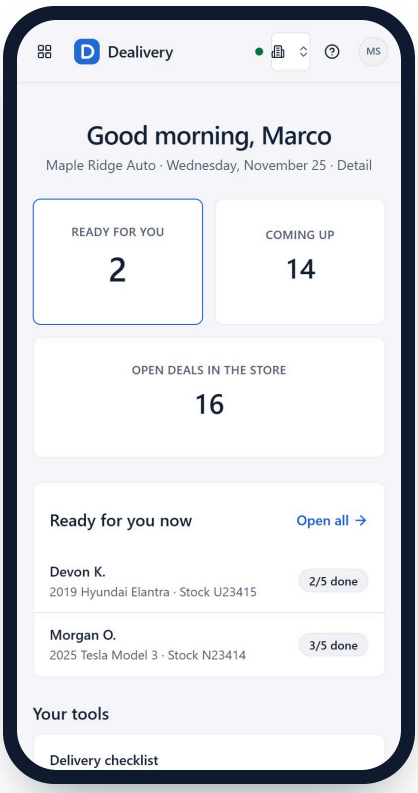
Parts

Order and track parts and accessories

You work the same Service section as Service.

1. **Add an accessory** to the deal.
2. Track it to **installed**.
3. Order **recall parts**.

You're told when Finance completes its section.



D DEALIVERY

Staff card

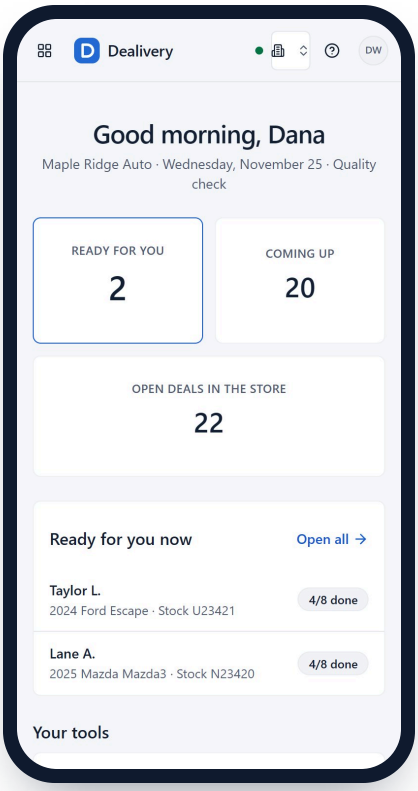
Detail

Clean the car

When you finish, the car is ready and the customer is told.

1. Open the car under **Ready for you**.
2. Tick your **Detail** lines.
3. Press **Mark Detail complete**.

You're told when Service finishes. Then the salesperson is told and the customer gets the "vehicle ready" text.



D DEALIVERY

Staff card

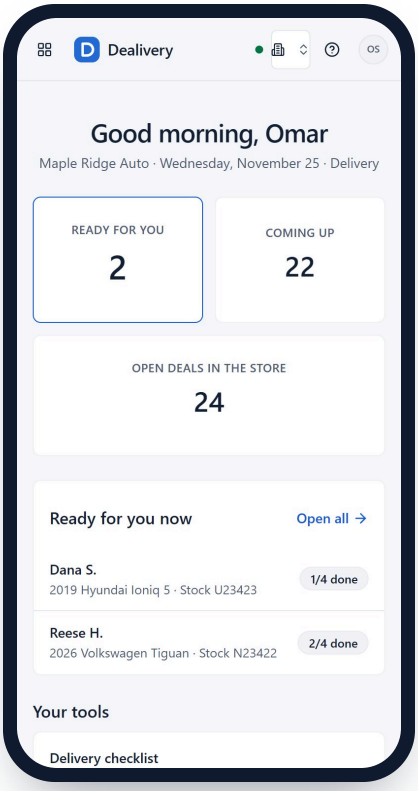
Final Check

The last check before the customer

Only you sign it off, and only you clear a problem you reported.

1. Tick the **Final quality control** lines.
2. Pass the car to **Delivery**.
3. Problem after the ready text? **Report it**. A safety problem holds the car.

Good to know The salesperson and finance are always told when you report a problem.



D DEALIVERY

Staff card

Delivery

Hand over the car and close the file

Your page is called Deliveries.

1. See what's **coming**.
2. Pickup day: tick the lines, press **Mark Delivery complete**.
3. Need a different time? **Ask for it** from the file.

Good to know The customer gets a thank-you and the review link. Used-car buyers get a survey 24 hours later.