

United Auto Supply

Foreign & Domestic Parts Specialists

Counter staff check list.

Phone-

- Logging into the call center
- Being on DND
- Transferring calls
- No "Blind" transfers
- How to look up someone's extension
- Check your voicemail

Universe-

- Reading of the customers notes
- The header
- Change to cash mode. If changing to cash, do they want tax added
- Credit memo
- Change order from Hot Shot to Stock Order
- Change a Ship To
- Customer history on a part number
- Are you able to DP an order if the part is already pulled
- Family pricing

Cataloging-

- Are you familiar with how to find the parts. Part Search, Group, A-Z, Favorite Jobs, Recent Lookups and GM Illustrated Catalog
- Some parts per car qty. if more than the customer needs, make sure to change the qty.
- Be thorough, before you say we don't have something, did you check manufacture web site or ask your neighbor?
- GM cataloging, are you aware of the Battery, pigtail and chemical catalogs?
- Are you familiar with how to run a vin
- Do you know about Hot Words or Key Words

Transfers-

- F9 screen/ are you aware how to read it
- Do you know how to bring up the transfer schedule on our web site
- Are you aware how to bring up the closest warehouse to transfer from (G)maps
- Customer directs and how to determine if the customer is a candidate for it
- Familiar with all our locations and where they are located

Stock Orders-

- XX orders
- Customer direct XX orders
- Hot shot pricing for stock orders

Sequel Server-

- Are you able to log in
- Are you familiar with what would best help you

Buy out-

- Create a part number
- Bill a part as a BY
- Adding the shipping

Finalizing an order-

- Are you familiar with the last screen before finalizing an order.

ODT Viewer-

- Is it loaded on your PC
- Do you know how to track an order

Employee handbook-

- Do you know how to log in to review the handbook?
- Are you familiar with the policies

Hours of operations-

- Weekday hours
- Weekend hours
- Which locations to CD from on Sundays

Returns-

- Return policy instructions
- Are you able to do a Reversal

COD orders-

- Change a charge order to COD.
- Change a COD order to the correct mode..... Cash, CC, Check
- Run a CC in the TE (trans express)
- Do you have the TE instructions
- Picking the correct date for a COD ticket
- Add tax

Bulk oil Schedule-

- Procedure how to add a customer to the tanker delivery schedule

Services offered-

- DPF cleaning
- Non UAS inventory delivery
- Bulk oil delivery

ROA's (received on account)

- Run a statement
- Run a CC in TE under ROA
- Do you have the ROA directions

Web sites-

- Are you familiar with our web site
- Do you have all the manufacture's web sites in your favorites
- Do you have log in for the sites we can order from

Special orders-

- Do you have a list of manufactures with phone number, web sites and our account number
- Receiving an authorization number to order the part
- Adding the information to our web site
- Billing a special order

Counter personnel signing this confirms that all processes have been reviewed with your trainer and you completely understand each Process.

Employee

Signature _____ Date _____

Print
name _____

Trainer

Signature _____ Date _____

Print
name _____

Supervisor

Signature _____

Print
name _____ Date _____