



GVM/ BTC PROCESS

System being used: Units & Dropbox

Access Type: All Staff

**** Quote customer by qualifying customers needs, vehicle type etc. Once customer wants to proceed with the quote then please complete the following. Again make sure you are checking the GVM/BTC Guide Sheet Ray has in Dropbox for whether the vehicle needs any extras such as tyres, indicators etc ****

Step 1. Convert Quote to Sales Order in Units, placing all items that need to be ordered by Lovell's on backorder as you normally would do with any other sale.

Step 2. Generate a Purchase Order in Units as normal. Print a copy of the Purchase Order for our paperwork.

Step 3. Contact customer for a copy of Registration Papers (front & back) for the vehicle to submit with Purchase Order. Also request a picture of the VIN PLATE.

Step 4. Print off & complete the manual Lovells Purchase Order located in Dropbox so that it reflects the purchase order which was created in Units. Please ensure you are selecting the correct order form whether it be Federal or State Compliance that is needed.

Step 5. Scan Units Purchase Order, Lovells Purchase Order, Customer Registration Papers Copy to Lovells for submission. It is to be faxed or emailed directly to Lovells Springs on **(02) 9820 6788** or sales@lovells.com.au. Also at this stage send Customer Registration Papers and picture of VIN PLATE to **Mike Davidson** miked@lovells.com.au.

Step 6. Lovells will then email (generally the same day) with a current lead time on kits and estimated shipping date from them. They also CC in Mike Davidson & Dragan Vasic so everyone is kept in the loop.



Step 7. You will now need to book the customer, Mike Davidson, Michael (GVM Fitter from Coopers Plains) in allowing for appropriate delivery based off shipping dates to the arrival to your store. Please allow for a few days buffering incase anything goes wrong. Firstly call **Mike Davidson** to see what dates he is available for compliance. Once he has proposed a date, contact **Lana French** to book **Michael the GVM fitter from Coopers Plains** for the installation days needed. Lastly contact the customer and advise him of the time needed for installation & compliance. Ensure this is reflected in your calendar booking system on all days that are needed.

Step 8. Keep all of the paperwork that was sent to Lovell's with a copy of the Sales Order until vehicle's booking date in a safe place.

Step 9. On the day of installation **Michael (GVM Fitter)** will need to provide you with the following:

- Completed Data Capture Form
- Brake Inertia Test Results
- Owner's Manual
- Corner Weights of Vehicle
- Lovells GVM/BTC Checklist
- Wheel Alignment Results
- 4x4 Megastore 'Fitter' Checklist

Step 10. On the day of Compliance **Mike Davidson** will need to be provided with the following:

- Lovells Manual Purchase Order Copy
- Completed Data Capture Form Copy
- Brake Inertia Test Results Copy
- Registration Papers (front & back) Copy
- Lovells GVM/BTC Checklist Copy
- Wheel Alignment Results Copy

Step 11. **Mike Davidson** will then provide you with a Certificate of Modification for compliance. You will then need to take a copy of this for our records. The original green copy will need to be put with the Owner's Manual in a little A5 envelope in the customer's vehicle ready for handover. He will also need to double check the photo of the original compliance plate and will need to inspect that the stickers have been securely attached to the vehicle in the right correct locations.

Step 12. Complete the 4x4 Megastore 'Salesperson' Checklist with **Mike Davidson** to ensure he has everything he needs and we have all the correct paperwork we need for our records.



Mike will then give you a tax invoice, take a copy of this for our paperwork and then submit the original invoice to be entered by the nominated person in your store.

Step 13. When completing the handover with customer you will need to show them where the A5 Envelope has been put and explain to them that it contains the Owner's Manual & original Certificate of Modification. You will then need to go around the vehicle and show them the following things:

- Modification Plate Location
- Tyre Loading Information
- Stickers - meaning of each one.

Step 14. Once final payment has been made and the keys have been handed over to the customer you can then finalise the paperwork. Complete and Sign Off on the 4x4 Megastore 'Salesperson' Checklist, print the customer's final tax invoice. The order of paperwork should look like this:

- Copy of Customer's Units Tax Invoice
- Copy of 4x4 Megastore Salesperson Checklist
- Original GVM/BTC Manual Purchase Order
- Copy of Units Purchase Order
- Copy of 4x4 Megastore Fitter Checklist
- Copy of Completed Data Capture Form
- Copy of Brake Inertia Test Results
- Copy of Lovells GVM/BTC Checklist
- Copy of Certification of Modification
- Copy of Wheel Alignment Results
- Copy of Registration Papers
- Copy of Force Suspension Invoice

Step 15. This can now be filed in your GVM/ BTC Folder in your store.