

GENERATING THE SALES ORDER

INTENT

The intent of this guide is to provide insights, guidelines, and Best Practices to support teams involved in **Generating the Sales Order**. Reviewing sales orders on a regular basis helps Managers understand their business better by giving insight into all transactions, developing critical thinking skills, and providing opportunities to coach employees.

SAFETY & QUALITY FIRST



CRITICAL TO SAFETY

- **Article Number:** Ensure all article numbers are entered and are accurate.
 - Article numbers should tell the story of why the customer is there and address their concerns.
 - Correct article numbers focus our attention on the right things, ensuring the customer leaves safer than when they arrived.
- **Be Specific:** Document in the Notes section exactly which assemblies are being serviced.



CRITICAL TO QUALITY

- **Quality Notes:** Write notes that are simple and easy to understand, but thorough enough to cover all key details.
 - This will help the Service Team expedite the work order and prevent Return For Service (RFS) issues, ultimately creating customers for life.
- **Capture In The Moment:** When out at the vehicle, be proactive and capture notes in the moment rather than waiting until inside the building.
 - It's easy to forget important information when walking from the vehicle to the POS.
- **Capture accurate customer phone number and email address.**

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OVERVIEW AND APPROACH			
What is Generating the Sales Order?	Generating the Sales Order is critical to Our Strategy of providing an Inviting, Easy, and Safe purchase and service experience for Our Customers. Generating the Sales Order accomplishes this by providing clear instructions to the Service Area to avoid delays, thus supporting our Core Fundamental of PSE and our Happy Employee gauge.		
Who is Responsible?	Who performs Generating the Sales Order?	What certification is required to perform?	What AOR oversees Generating the Sales Order?
	Sales Associates	Sales Apprentice	Senior Assistant Manager (AM)
When to Perform?	The generation of a sales order starts by adding it to the CSL after the Visit the Vehicle inspection has been completed. Once the service work is finished and the vehicle has been bayed out, the sales order is completed. <u>Important:</u> Sales orders are editable only until the vehicle is bayed out; after bay out, sales orders CANNOT be modified.		
Benefits	<u>For Our Customers:</u> • Peace of Mind: Leave with more peace of mind knowing requested services were addressed. • Right the First Time: The Service Coordinator has a clear picture of the service(s) needed, thus reducing Return For Service. • Trusted Experts: We demonstrate we are Trusted Experts who listen, thereby validating we are the BEST!		<u>For Our People:</u> • Clear Directions: Provides the Service Area with clear directions on what needs to be completed. • Fewer Delays: Prevents bay delays that cause unnecessary wasted time, frustration, and stress in the Service Area. • Higher CDI: Mid and final benedictions can be more specific to ensure a high CDI.
	Tools Throughout the Generating the Sales Order process, you must use the following tools:		
Point of Sale (POS)			Allows you to look up fitment and quote the least expensive tire in their size. This may include creating or editing a customer record, looking up customer information, converting appointments, generating sales orders, etc.
Mobility Device			Device (and device attachments) measure and capture vehicle, customer, and assembly information in the moment. Additional information is entered into the Notes section on the device.

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ADDITIONAL SUPPORT

Tips from the Trusted Experts

REMEMBER: Proper invoicing doesn't happen at the end—it begins the moment you start speaking with the customer! Every detail we collect from that first interaction helps us tell the full story of what the customer is dealing with. To ensure a smooth process and accurate sales order, we need to:

- **Ask the right questions** – Dig beneath the surface to uncover the real issue the customer is facing.
- **Listen carefully and capture everything** – Don't just rely on what the customer says directly. Look for context clues and patterns.
- **Document clearly and to the point** – Notes should be:
 - Captured digitally so they are printed (not handwritten) on the sales order
 - Detailed enough to fully explain the situation
 - Clear and concise so they're easy to understand
 - Written with the next person in mind, especially team members in the Service Area

When we take the time to gather and communicate the right information up front, we prevent misunderstandings, avoid delays, and help deliver a safer, world-class customer experience.

At the Vehicle – As you work through the items below, document notes *in the moment!*

Item	Goal	Examples/Considerations	Tips
Customer Concerns	Understand the root issue from the customer's point of view by asking follow-up questions where applicable.	▪ <i>"What specific problem brought you in today?"</i> ▪ <i>"When did the issue start? Has it gotten worse over time?"</i> ▪ <i>"Have you had this issue before? If so, when does it happen?"</i> ▪ <i>"Have you noticed any warning lights, sounds, vibrations, or changes in performance?"</i>	As a Trusted Expert, keep asking questions so you can truly understand the customer's situation. Make sure to document everything appropriately.
Special Instructions	Respect the customer's preferences and ensure clear communication.	• <i>"Please put customers chrome valve caps back on."</i> • <i>"Put the spare in bed of truck."</i> • <i>"40 PSI all around please."</i>	Confirm all special requests clearly in the notes so nothing gets missed.
Existing Damage	Protect the business and maintain trust with the customer.	▪ <i>Are there any scratches, dents, curb rash, or interior damage?</i> ▪ <i>Are the wheels already bent, cracked, or discolored?</i> ▪ <i>Are there any missing lug nuts, center caps, or valve caps?</i>	Be as specific as possible (e.g., "LR hub cap missing") and bring to customer's attention.
Wheel Lock Key	Avoid delays and unnecessary costs during service.	▪ <i>"Do you have a wheel lock key? Where is it stored?"</i> • <i>Turn the Wheel Lock slider on if they have a wheel lock key.</i>	Locate the wheel lock key and place it with the customer's keys/sales order.
Backup Plan	Prepare the customer and Service Team for next steps if things don't go as planned.	▪ <i>"If the tire can't be repaired, would you like us to replace it with a new one?"</i> • <i>"If the tire can't be repaired, would you like us to install the spare?"</i>	Avoid surprises! Let the customer know what decisions might need to be made and get pre-approval when possible. Document this plan clearly!

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At the POS – Address each item below as you generate the sales order.					
Item	Goal	Examples/Considerations	Tips		
Article Numbers	Ensure every product/service is invoiced with the correct article number. The sales order should tell an accurate story about the visit.	▪ <i>Are the correct article numbers entered for each product or service?</i> ▪ <i>Are any specific line items missing (e.g., alignment)</i> ▪ <i>Do any article descriptions need to be expanded on in the notes section, so it is clear?</i> • <i>Do the article numbers accurately describe the customer’s concerns and reason for coming in?</i>	Article numbers aren’t just for internal tracking; they tell the story of what was sold, why it was needed, and how we addressed the issue. Accuracy matters!		
Return for Service	Make things right with a Can-Do Attitude and ensure customer satisfaction.	▪ <i>What work was done during the last visit?</i> ▪ <i>Why is the customer returning?</i> ▪ <i>What do we need to do differently this time to ensure we get it right?</i> ▪ <i>Document exactly what was said and who said it.</i>	Clearly document in the notes if it is a return visit and alert the Service Team. Show the customer we take repeat visits seriously and aim to get them taken care of properly.		
Customer Location	Set expectations for where the customer will be waiting and ensure efficient communication.	▪ <i>Is the customer staying onsite or leaving?</i> ▪ <i>If leaving, what’s the best way to reach them?</i> ▪ <i>What time will they be back?</i>	Don’t just assume—ask and clearly note the details so the Service Team doesn’t waste time trying to track them down.		
Verify Products, Services, and Notes	Confirm expectations before initiating anything.	▪ <i>“Just to confirm, you’re getting [X] tires and [Y] service, correct?”</i> ▪ <i>“These are the special instructions I have... does that look right to you?”</i> ▪ <i>“Is there anything else you want us to look at while the vehicle is in the bay?”</i> ▪ <i>“If we experience any unexpected issues, are you the best person to contact?”</i> ▪ <i>“Do you have any questions for me about your visit today?”</i>	Slow down here! Even if it feels repetitive, this is your last chance to clarify. Confirming upfront prevents surprises later and improves customer satisfaction.		
Additional Tips • No Notes = No Good! • Avoid phrases like “See me.” Provide clear notes that empower the Service Area employees to complete the order. • Handwritten notes are not permissible on the work order. Highlighting, however, is acceptable. • 30 seconds of review with the customer can prevent 10+ minutes of delay later on! • Inform the customer to expect a digital receipt once the work is complete. If the customer requests a paper copy, provide it to them when it prints at bay out.					
Additional Resources	Throughout the Generating the Sales Order process, you may use the following resources: <table><tr><td>Using the Mobility Device for VTV QRG</td><td>Reference this guide on how to use the mobility device for VTV and Air Check features, scan the vehicle and tire, and access the data from the POS.</td></tr></table>			Using the Mobility Device for VTV QRG	Reference this guide on how to use the mobility device for VTV and Air Check features, scan the vehicle and tire, and access the data from the POS.
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Employee:	Observer:	Store #:	Date:
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	Action	Important Steps	Key Points & Considerations	✓
GENERATING THE SALES ORDER	1. Entered Article Numbers for All Products/ Services	- Enter all article numbers accurately so the sales order tells the complete story for the customer's needs. - If a Rebate Code is used, invoice properly per current promotions.	The sales order needs to accurately convey the conversation you had with the customer, so the Service Area has a clear picture of exactly what needs to be done.	
	2. Chose Correct Return for Service Reason	Clearly document all customer feedback and details for why they are returning for service (RFS), if applicable.	While all customers are important, returning customers should be prioritized to ensure they leave safely and fully satisfied.	
	3. Verified Customer Location	Document if the customer is staying in the Customer Lounge or if they are leaving. If leaving, confirm a good contact number for them and note when they plan to return.	This avoids unnecessary delays and ensures the customer can be reached promptly if additional information is needed.	
	4. Verified Notes	Review every product and service, as well as any special instructions, with the customer.	Taking a few moments to clearly communicate expectations with the customer avoids potential delays and issues later. It also shows we are Trusted Experts.	
	5. Documented Backup Plan	Confirm an alternative plan with the customer if original plan is not possible (e.g., tire is non-repairable)	Being proactive with a backup plan prevents service delays by eliminating the need to call or locate the customer.	
	6. Explained Journey Tracker	Review Journey Tracker with the customer and ensure they know how to use it.	Technology helps customers stay in the know about the status of their vehicle.	
	7. Placed Wheel Lock Key in Sleeve	Gather keys / key cards and wheel lock key and place them in the sleeve with the finalized sales order.	This provides the Service Area with everything they need in one place to begin service on the vehicle.	
AUDITING THE SALES ORDER	1. Comparing Pricing	- Is everything on the sales order set at retail price? - If not, was there a logical explanation for the deviation? - Was a Rebate Code used and invoiced properly per current promotions?	- When invoicing a customer, don't change the established pricing. - Deviating can undermine pricing structure or the value of a service/product, which suggests a lack of confidence in our prices.	
	2. Product Recommendation	- Was Treadwell used? - Was the product in stock or special order? Core product? GBB? - Were adjustments invoiced accurately? Were labels printed with the sales order and were tires saved?	- Customers deserve the best product for their needs, when they need it. - To give Our Customers the most credit back, we need to retain the adjustment tires and tag them correctly with labels.	
	3. Certificates	Were certificates invoiced?	- Certificates are valuable to Our Customers and keeps them coming back. - Auditing certificates provides opportunities to improve CES.	
	4. Wiper Blades	Were wiper blades invoiced?	- Wiper blades are valuable to Our Customers as they provide an Unexpected Experience. - Auditing wiper blades provides opportunities to improve CES.	
	5. Service Orders	- Was tread depth 4/32 or less? 6 years old? - Was vehicle age and spare tire inspection performed?	Auditing tread depth and tire age presents opportunities to keep Our Customers safe because we can re-engage with the customer in the moment.	
	6. Comment Line	Were the instructions for the service area clear and accurate?	Clear and accurate instructions prevent bay delays.	
NOTES				