

SERVICE LATER

INTENT

The **Service Later** function is intended for committed customer transactions that will not be added to the CSL for service immediately. Using it correctly ensures accurate inventory management and prevents misuse for non-committed scenarios.

SAFETY & QUALITY FIRST



CRITICAL TO SAFETY

Not Applicable



CRITICAL TO QUALITY

Inventory Commitment

- Be clear and intentional – If you create a Service Later, you are **hiding inventory** both in-store and on the web, possibly lowering demand.

7-Day Installation Rule

- Product scheduled through Service Later must be installed within **7 days**, or the customer's authorization will drop.
- Share this information with the customer.

OVERVIEW AND APPROACH

What is Service Later?

The **Service Later** function is for committed customer transactions that require future fulfillment.

Who is Responsible?

Who performs a Service Later?

Sales Associates

What certification is required to perform?

Sales Apprentice

What AOR oversees Service Later management?

Marketing Assistant Manager

When to Perform?

Service Later transactions are performed when you have a paid in full transaction with or without an appointment.

Benefits

For Our People:

- Keeping customer information attached to stock.
- Holding inventory.
- Taking deposits.
- Documenting notes and comments to provide a more seamless experience to increase customer delight.

For Our Customers:

- Notifications on product ordering and arrival.
- Notifications on appointment information and ability to manage appointments.
- Allows for better flexibility if customers have time constraints.
- Not having to repeat information to Discount Tire in case a different employee checks the customer in.

Tools

Throughout the **Service Later** process, you must use the following tools:

Point of Sale (POS)



This is the system used to process all transactions in our stores.

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ADDITIONAL SUPPORT

Tips from the Trusted Experts

Quotes

- Use quotes for services and to save product to a customer's account without reserving the product. This allows you to track product/service conversations without impacting inventory.
- Manage quotes daily to increase demand and prevent a buildup of unneeded quotes on the list.

Inventory

- Service Later holds inventory for a customer, which means other customers online or in store will not have access to that product.

Deposits

- Deposits must be paid-in-full only. No \$25/partial deposits.
- Authorization on customer credit cards will drop off after 7 days. Product must be installed within 7 days.
- Quote to Purchases will hold funds for up to 28 days.
- Paid-in-full deposits made with Debit, Cash, or Check will not fall off.
- Inform your customer about re-authorization if the install date is past the pre-authorization limits for the tender/transaction type.

Additional Resources

Throughout the **Service Later** process, you may use the following resources:

Special Orders Best Practice	This document provides the instructions on how to process and manage Special Orders in your store.
Appointments Best Practice	This document provides the instructions you need to manage Appointments in your store.
Payment Acceptance Policy	This document provides the policies put in place to ensure we are handling our customers' payments properly.
Quote to Purchase	This document provides the instructions to follow when completing a Quote to Purchase order in your store.