

Setup Guide for TSD's Delivery & Collection

TSD's Delivery and Collection module helps you meet your customers' needs by bringing your dealership to their driveway. Drop off service loaners and sales test drives with TSD's simple step-by-step mobile process. **Contact your TSD Sales Representative at sales@tsdweb.com for more information.**

Below, you'll find a detailed walkthrough for setting up Delivery and Collection, from the most essential setups to additional optional setup items to consider.



1. TSD must turn on the Delivery and Collection module. **Contact sales@tsdweb.com for more information.**




Why? → So you can start setting up your Delivery and Collection, including designating drivers, charging fees, limiting appointments, and more.



2. Designate employees as drivers.

Why? → So you can assign drivers to deliver and collect.

1. Go to Admin > Delivery and Collection tab and edit () the Driver Designation setting.
2. Toggle on () Enable as Driver.
3. Click SAVE. The employee will be included as an option in Delivery and Collection Driver lists.

Driver Designation 	
Driver Designation Table	
Employee	Enable as Driver
Stephanie Smith	
Veronica Fletcher	


3. Have TSD Turn on Driver GPS Tracking. **Contact sales@tsdweb.com for more information.**

Why? → Gain visibility into the location and status of your drivers.

If you have drivers using the mobile app, you and your customers can track the driver's route on a map for the duration of the trip, so your business and your customers can have accurate and up-to-date information about when a delivery or collection driver is expected to arrive to the destination.

4. Set up a service radius.

Why? → Be notified if a destination is too far away from your location (for example, so you can choose to manually charge an extra fee for the distance).

1. Go to Admin > Delivery and Collection tab and edit () the Delivery and Collection Radius (Miles) setting.
2. Enter maximum distance, in miles, from your location to which you are willing to deliver and collect.
3. Click SAVE. You won't be prevented from delivering and collecting outside of this radius, but an informative message is displayed if the destination is outside of your radius.

Delivery and Collection Radius (Miles) 



25



10


Default Value: 0

5. Set up Delivery and Collection Fees.




Why? → To charge for deliveries and collections on your appointments and agreements.


1. If you plan to tax your Delivery and Collection fees, make sure you've set up taxes first by going to Admin > Rates tab and editing () the Taxes Setup setting.
2. Go to Admin > Delivery and Collection tab and edit () the Delivery Fees Setup setting.
3. Set up a single fee for Delivery and Collection, or a separate Delivery fee and/or Collection fee, as follows:

- **Single fee for all Deliveries and Collections:** Toggle on () the Delivery and Collection fee option to set up a single fee that automatically applies once to appointments and agreements marked for delivery, collection or both.
- **Separate fees for Deliveries and Collections:** Toggle on () the Delivery option to set up a fee that only applies to appointments and agreements marked for delivery. Toggle on () the Collection option to set up a fee that only applies to appointments and agreements marked for collection.




Delivery Fees Setup 

Delivery Fees Table


FEE	ENABLE	FEE
Delivery and Collection		50.00
Delivery		0.00
Collection		0.00

Delivery Fees Setup 







Delivery Fees Table

FEE	ENABLE	FEE
Delivery and Collection		0.00
Delivery		25.00
Collection		25.00

4. Enter a Fee amount (e.g., 15.00).
5. (Optional.) If you want to apply taxes to this fee, select the tax(es) you want to apply.
6. (Optional.) For manufacturers that expose rates externally on a website, select the Exposed Externally option to make the fee available for selection on your website. **Note: This feature is sold separately. Contact your TSD Sales Representative at sales@tsdweb.com for more information.**
7. Click SAVE to save the setting.


Delivery Fees Setup 

Delivery Fees Table

FEE	ENABLE	FEE	TAXES APPLIED	EXPOSED EXTERNALLY
Delivery and Collection		50.00	* Flat tax *	
Delivery		0.00	Select Taxes	
Collection		0.00	Select Taxes	


6. Set up Delivery and Collection Appointment Caps

Why? → To prevent over-scheduling drivers by limiting the number of booked Delivery and Collection appointments that can be scheduled for pickup on each day of the week.

1. Go to Admin > Delivery and Collection tab and edit () the Delivery and Collection Appointment Caps setting.
2. Enter a cap for each day of the week, as needed, as long as it does not exceed your total daily appointment cap, which limits appointments of any type that can be scheduled for pickup on a daily basis. For example, if you have only three drivers on Monday, but five on Tuesday, you can cap Monday to three appointments, and five appointments on Tuesday.

Note: By default, each cap is blank, which means there is no limit for appointments that day. If you want to prevent any Delivery and Collection appointments from being scheduled on a certain day, enter 0.

3. Click **SAVE**. If a cap is met on a Checkout Date, an appointment cannot be booked for that day.

Delivery and Collection Appointment Cap 

Delivery Appointment Cap Table

Current Appointment Cap: 40

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Cap	5	7	5	5	10	10	5

Additional Delivery and Collection Setup Options

Some management settings are also available on the Delivery and Collection setup, as they may come in handy when it comes to your Delivery and Collection process. Consider taking advantage of the following setup options:

- **Contactless Appointments**
Why? → Offer expedited service, so customers can remotely access appointments via email and text, then submit information in advance.
- **Contactless Appointments Message**
Why? → If using Contactless Appointments, customize your email and text message.
- **Enable Customer Automobile Inspections**
Why? → Ensure customer satisfaction and a fair and transparent experience for both parties while their vehicle is in your possession.
- **Require Repair Order Number**
Why? → Make sure a Repair Order # is always entered on appointments, and/or open and close.
- **Require Customer VIN**
Why? → Make sure a customer automobile (including its VIN) is always added to opens.
- **Credit Card Required at Open and Pre-Authorization**
Why? → If using Credit Card Processing, make sure a credit card is always added to open agreements.