

# Team Tips

ARTICLE: G-15-12-01

DATE: Original Release: December 10, 2015

Published for Polaris Dealerships, Distributors, and Service Technicians

**\*\*\*REVISED on 2/26/2016\*\*\***

## **Polaris Customer Delivery Experience (PCDX)**

There is no doubt that for a Polaris customer the process of picking up a brand new vehicle is one of the most exciting times in the ownership experience. To ensure that all Polaris dealers are equipped to deliver a world-class experience that matches the high quality and excitement of the products, PCDX was developed to create a mobile streamlined dealership delivery experience. PCDX combines the setup, registration, and delivery process into one easy to use application.

PCDX is live and ready for your dealership to start taking advantage of to deliver a consistent, professional, and enhanced customer experience.

Thank you to all the dealers who have already taken the first step of getting their entire staff trained. Feedback from fully trained dealerships is that PCDX is simplifying their operations, reducing paperwork, driving consistency from PDI through the delivery experience, establishing an electronic customer connection, and streamlining vehicle registration.

To allow for an easy transition and adoption process for your dealership, the current warranty registration system will remain operational along with PCDX until early Q3 2016.

However, we highly suggest you start using PCDX now. Starting now will allow you to:

1. Encourage all of your dealership staff to complete the five PCDX training modules – which require completion before July 1<sup>st</sup> to maintain your 2016 MSD status. Log into [UniversityofPolaris.com](http://UniversityofPolaris.com) to get started.
2. Determine how to best maximize PCDX for your dealership and establish standard operating procedures that work for you.

In early 2016 we will encourage dealers to complete their training and assist with any questions that arise as PCDX is explored and adopted. Our goal is to have the majority of Polaris dealers fully trained (Service, Sales, F&I, Warranty, etc.) and successfully using PCDX before officially retiring the dual-path registration option.

Remember, dealers who are trained and are using PCDX for PDI, Customer Registration & Delivery are:

- Saving time; approximately 10 minutes per sale
- Reducing paper waste and eliminating the need for paper PDI retention
- Improving the customer delivery experience
- Establishing a standard delivery process across their dealership to ensure a consistent setup and delivery experience regardless of which employee performs it

Don't risk losing your MSD status; set a goal now to engage and be fully trained and operational before July 1<sup>st</sup> to maintain certification and to enjoy the benefits of PCDX.

## FAQs

### What case types are available to submit an Ask Polaris cases?

Case Type #1 – Warranty Registration

Case Type #2 - PCDX

Case Type #3 – Dashboard/Northstar/ Forms/NPS/Pre-delivery/Customer Delivery/Cancel/Email

### What is the process for transfers?

Polaris is developing a real-time transfer process that will begin 3/1/2016.

The new transfer system will ensure that the VIN being transferred existed in the dealer's original inventory (i.e. VIN is not registered or a suspended registration). If the VIN is valid, it is then transferred to the correct dealer number inventory that is attempting the new PCDX. The dealer will receive the transfer and can start and finish a PCDX form that day. This includes different dealer codes, but same COMS and cash transfers.

If the dealer that is transferring a unit has started a PCDX form, they need to inactive that form to allow the receiving dealer to start a new form at their dealership. Starting a new form ensures that the unit is setup per Polaris requirements, the unit was not damaged in transit, service bulletins are completed and the selling dealership staff approves the unit is ready to retail.

### What is the process for deliveries?

Complete the PCDX form as a normal customer pick up. Under the Vehicle Inspection section there is an area labeled: Notes (optional). Type in comments about this being an off-site delivery and invoice or payment # (something that ties a payment transaction to the person/customer you are delivering to); this is an open-text field and they can put a large amount of data in it.

Continue through the form, completing the PDI section, Customer Registration, and Delivery sections. Once you have reached the last section Customer Acceptance. Enter the customer's name as required, and place a smaller X in the customer signature box.

This will allow the form to be completed and they can click on the Print button (lower right corner) to print a paper copy. We suggest making an extra copy – one to leave with the unit and the other asking the customer to sign and send back in.

### What do we do about customers who do not have an email address or won't provide one?

We understand that some customers may not have an email address or choose not to supply one during the PCDX process. Please make sure that the customer understands that the email provided though PCDX is for Service-related communications and unless the customer opts-in by checking the two options on the Customer Contact Preference page, they will not receive other emails from Polaris.

**NOTE:** If the customer(s) previously provided an email at an event, promotion, etc., that email will continue to receive communications. This email address will also be used to activate a my.polaris.com account, where the customer can access their mobile owner's manuals, track maintenance, and review warranty and extended service contract information.

An email address is required for PCDX and has been required for Warranty Registration since August 2015. If you have a customer that is not willing to provide an email address, we suggest that you set up a new email account for your dealership (examples: customerservice@abc.com or servicecommunications@xyz.com) and use those for your customers who are not willing to provide an email address. This way, if service-related communications are sent, your dealership will receive a copy and you can follow up with your customers. These communications will be in addition to all established dealer communications that you receive today.

By setting up this secondary dealership email, you do not have to worry about an influx of emails into your day-to-day email accounts and will still remain compliant with Polaris Dealer Requirements.

## **How do we register to obtain NVIS?**

The PCDX application was designed with flexibility in mind for Canadian dealers to obtain NVIS paperwork for customers. The PDI and Customer Registration sections need to be completed in order to Warranty Register a unit.

This allows the dealer to submit and obtain NVIS paperwork while not requiring the dealer to complete the Customer Delivery section prior to the customer accepting the unit.

## **What if we need to print a copy for a customer?**

PCDX allows you to print a copy of the form at any time in the process. Once a PCDX form has been started, navigate to the Customer Acceptance section and in the lower right hand corner you will see a Print button. When this button is clicked, the application will print a PDF copy of the current PCDX form.

**NOTE:** The printed PDF version will have fewer sections than the online application. The general warnings, customer information, and customer contact preference sections will not print on the PDF. These sections are accessible online only.

As noted in the PCDX trainings, make sure to click “save and continue” for any work that has been completed in the current form before clicking Print. If you do not click “save and continue”, the form will not print any of the work you have completed.

## **Why is the section locked by another person?**

PCDX was developed to allow up to three different dealer personnel to work on one form at a time. A different person could be working in Pre-Delivery Inspection, Customer Registration, and Customer Delivery. When you select a form to edit, enter your name, and click the drop-down menu to select a section to work in. You may see that one of your co-workers is working in the section you want to access.

You can still access that section, however, you will not be able to make any changes or mark tasks complete. Only the person who has the section locked can make updates to that particular section. As long as other sections are not locked, you can navigate/work in those sections and complete tasks.

Once your co-worker saves and exits the form he/she is working on, click save, exit and log back into the form to access the desired section. PCDX will log users out of the form after 30 minutes of inactive use.

## **Why is PCDX not listed under the Service and Warranty drop-down menu?**

If you are logged into DEX and you cannot see PCDX under the Service & Warranty menu, contact your supervisor or security administrator at your dealership and ask them to update your security/role settings by enabling PCDX.

## **Do I need a signature pad/software?**

You do not need a signature pad or third-party software package to allow personnel or customers to sign PCDX forms. PCDX was designed to be signed using a mouse (desktop or laptop computer) or using your fingers if using a tablet or smart phone.

You do not need to zoom in to enlarge the signature areas. If your dealership is using older versions of Internet explorer or Google Chrome, the signature area will not work due to software issues not controlled by Polaris Industries Inc. If you have zoomed in to sign a section, zoom out to the normal view and the signature area will work.

## **What type of tablet should my dealership purchase?**

PCDX is accessible from the Polaris Dealer Site via desktop computers, laptops, tablets, or smartphones. Apple or Android tablets and smartphones can be used.

Minimum requirements:

- Android (recommended) or Apple; Android tablets are typically more economical and are also compatible with Digital Wrench
- Front and rear facing camera