Document Management Software

(Confidential - For Program Use Only)

DealerDOCX™

Powered by CloudDOCX

DESCRIPTION OF PROGRAM ENGAGEMENT

Discovery Call	Partner will conduct 10 - 15 minute call with dealer to evaluate if they are the correct solution for assisting the dealer with their needs.
Solution Presentation and Live Demonstation	Partner will perform 30 - 45 minute in person or web based meeting to review the solution and perform a live demonstration.
Document Types and Volumes	Dealer will provide partner with the type of documents they would like to scan (DJ, RO, PT) and the annual volume of each document type.
Pricing Review and Agreement Execution	Partner will provide dealer with electronic quote of monthly charges based on the document types and volumes provided by the dealer. Once pricing is agreed upon partner will send a Master Service Agreement (MSA) to dealer electronically for review and execution.
Onboarding	Partner will conduct onboarding call with dealer to review process, partner will provide dealer with a users and permissions spreedsheet. Dealer list the users names and email addresses and determine which document types the user will have access to and if their is any IP restriction for loging on.
Cloud Creation	Partner will create cloud instance, all users will receive invitation email to logon for the first time. Once they logon they will be promoted to create a new password.
Supplies and UPS Instruction Guide	Patner will send dealer supplies (red totes, zip ties, fillable manifest, prepaid shipping labels) as well as an instruction guide for shipping via UPS.
Training	Once the partner receives the first batch of documents and they are processed and uploaded into the cloud the partner will provide system training for each user at the dealership(s).
Special Pricing	Dealers using Edge will qualify for special pricing and agreement terms.