

Paperwork Procedure for Local Moves

Introduction

Filling out the paperwork properly is essential for protecting the company. In this portion you will learn the basic process of filling out the paperwork on local jobs. It's the responsibility of the foreman to get all paperwork filled out properly.

1. Pre-Job - At the Warehouse

- Review paperwork packet prepared by the office staff
- Orange Sheet (Customer Information Sheet)
Review all information on this sheet and determine if you will need any additional supplies. Delegate your crew to gather all needed supplies such as packing materials, specialized floor covering, etc. Look for any information that might pertain to the type of customer we might be dealing with. Look for any information that might indicate exceptions to normal procedure such as a customer payment arrangements.
- Estimate paperwork
It's a good idea to look at the estimate to see what the customer expects to pay. This should help you pace the job properly.
- Packing Pull Sheet
If packing needs to be pulled for the job you will need to review this sheet prepared by the office. This will be discussed in another portion of the training.

2. At the origin address

- Valuation coverage paperwork
After the walk-through spend a few minutes with the customer discussing their coverage options. This should not be done at the end of the move because it complicates the claims process if there is damage. Make sure to explain to them their options and then have them sign the bill of lading accordingly.
- Inventory paperwork
Completing an inventory on locals is very unlikely but you should be able to do this if needed. If the customer requests an inventory then you are required to do so. The extra charge to do this is simply our normal hourly rate. You can also decide to do an inventory if you deem it necessary. There are 2 key times for you to do an inventory: a) if the shipment is coming into our storage we must have an inventory with stickers; b) if the customer has several high value items that are concerning to you. If we think we have a particular customer and they are requesting extra coverage we want to perform an inventory. Make sure that they sign each inventory sheet at the origin before you leave. If you have any questions about this contact the office.

3. At the destination address

- Bill of Lading paperwork
After the job is completed you will need to make sure to discuss the bill with the customer. Figure all charges before you spend time with the customer. It's best to do this in the truck or out of sight from the customer. If you have questions about any of the charges call the office to get clarification. It is best to spend time with the customer in an area where there

is ample space to view the paperwork; such as a kitchen counter or table. Explain to them the charges line by line in a courteous professional manner. If they have any questions do your best to answer them properly. If you are unsure let them know that you will get an answer and contact the office. Unless it is out of your control **DO NOT LEAVE THE JOB WITHOUT SIGNATURES ON THE BILL OF LADING.**

- Inventory paperwork

If inventories were performed and the shipment has been delivered, make sure to have them sign all inventory. Be willing to explain to them what information is on the inventory sheets. Unless it's out of your control, **DO NOT LEAVE THE JOB WITHOUT SIGNATURES ON THE INVENTORIES.**

- Financial paperwork

Collecting payment is critical to our success and it should not be overlooked. A customer can pay with credit card, cash, bank check, or personal check. If they pay by credit card you will need to fill out the credit card information onto our form and then call it into the office for authorization. If the office is closed you will need to contact management before you leave the job site to get permission to leave with an unauthorized credit card payment. If the customer chooses to pay with a personal check you will need to **GET THEIR DRIVERS LICENSE NUMBER AND DATE OF BIRTH.** If we don't get this information we cannot prosecute if their check does not clear.

- Customer Comment Card

Make sure to give the customer a 'Customer Comment Card'. This is the best way for us to get consistent feedback from our clients.

- Make sure to give all necessary duplicate copies to the customer

4. Post Move – returning to the office

- Take all paperwork from the job and return it to the office. It is critical that all documents and payment are returned to the office as soon as you return. Loss of paperwork and payment is a big problem.