

Sales Department -- Order Pak Checklist

TO: LACE HANCOCK -- SALES COORDINATOR
JEREMY "JT" TERRY -- USED EQUIPMENT MANAGER

SALES REP: _____

CUSTOMER: _____

ORDER FOR: _____

DATE ORDER RECEIVED FROM CUSTOMER: _____

- ORIGINAL SRA WORKSHEET (not a fax)
- CROWN ORDER SHEET (not a fax)
- MCFA CSM FORM or CROWN EA REQUEST FORM
- JCB ORDER FORM
- CUSTOMER PURCHASE ORDER RECEIVED
- SIGNED PROPOSAL
- COMPLETED CREDIT APPLICATION
- LEASE WORKUP / QUOTE FROM FINANCE COMPANY
- LEASE DOCUMENTS ORDERED FROM FINANCE COMPANY
- CAPACITY PLATE CHANGE REQUEST FORM
- DELIVERY REPORT
- MACHINE SHIPPING ORDER
- RENTAL CONTRACT IN LIEU OF M.S.O.; CONTRACT # _____
- DEC USAGE AGREEMENT
- EXTENDED POWERTRAIN CONTRACT
- DOUGLAS POWER SIZER / BATTERY & CHARGER ORDER FORMS
- SERVICE CONTRACT
- P.M. AGREEMENT CONTRACT
- APPLICATION SURVEY
- TM&R AGREEMENT CONTRACT
- USED EQUIPMENT DELIVERY REPORT (WITH WARRANTY)
- USED EQUIPMENT DELIVERY REPORT ("AS IS")
- USED "NO WARRANTY" STATEMENT
- OPERATOR'S MANUAL (NEW or USED LIFT TRUCKS)
- NEW CAPACITY PLATE FOR USED TRUCKS
- TRADE-IN INSPECTION REPORT
- USED EQUIPMENT RECEIVING REPORT (FOR TRADE UNITS)

SPECIAL HANDLING (IF ANY): _____

STANDARD %: _____ SPAR # and %: _____ TOTAL %: _____

DELIVERY TIME NEEDED: _____

FACTORY SHIP DATE: _____ DELIVERY DATE: _____

ORDER DISCUSSED WITH: B. LORENZ B. TYRA LACE JT