



Sales: Installation Coordinator Checklist

Sales: Proper installation requires completion of the following steps:

- 1. Customer requests installation.
- 2. **Send** Installation Planner Form.
- 3. Customer completes Installation Planner and returns it to Intec (Roze)
- 4. **Contact** the Customer and confirm installation details
 - a. **Confirm** On-Site Contact name and phone number.
 - b. **Confirm** that On-Site Contact will be present during the installation.
 - c. **Confirm** Assistant name and phone number.
 - d. **Confirm** that the Assistant will be present on-site during the installation.
 - e. **Confirm** all truck/machine information.
 - f. **Confirm** truck voltage - 12VDC or 24VDC.
 - g. **Confirm** requested system details.
 - h. **Arrange** for the systems to be shipped and held for installation.
 - i. **Confirm** the trucks will be clean and operational, the install area will have power, be safe, covered, and lighted.
- 5. **Provide** the completed Installation Planner to Roze. **Install will not be completed without this form.**
- 6. **Confirm** shipment to On-Site Contact, marked "**Hold for Installer.**"
- 7. Roze to contact installer and to contact the customer and inform them of the upcoming installation schedule.
- 8. Installer to contact the customer, confirm final schedule and details.
- 9. Installer to provide post-installation sign-off and pictures.
- 10. Sales to contact customer to follow-up, confirm satisfactory installation.

INTEC Product Details: Confirm the equipment to be installed and note any special considerations.

Sales Comments: Note any special considerations.

MARK ALL ORDERS TO A SPECIFIC PERSON'S ATTENTION AND NOTE TO "HOLD FOR INSTALLERS"