



QUALITY MANUALS | FIRST EDITION

IAF DIGITAL CUSTOMER EXPERIENCE AND DEALER SALES MANUAL

Controlled digital retail
and verified vehicle delivery

STABLE RELEASE

Document No. IAF-MAN-DCS-001 | Revision 01

Vehicle configuration and transparent online sales
Dealer conduct and test drive operations
Physical and digital fulfilment quality

International Automotive Federation

English master text | 15 September 2026

iaf.com

Publication identity and use

IAF Digital Customer Experience and Dealer Sales Manual

This manual defines quality controls for the automotive customer journey from digital vehicle configuration to online contracting, dealer interaction, test driving and delivery. It connects accurate commercial information with the actual vehicle, customer permissions, physical readiness and digital ownership state.

Control	Publication record
Document	IAF-MAN-DCS-001 IAF Digital Customer Experience and Dealer Sales Manual
Edition and revision	First Edition Revision 01 Stable Release
Text issue	15 September 2026 English master text
Document owner	IAF Quality function and the relevant automotive technical committee
Custodian	IAF Secretariat and Document Controller
Institutional authority	Competent authority under IAF-CON-001. Publication does not amend the Constitution.
Operational adoption	Accountable operating director and competent technical leads record the actual approval, markets, scope and effective date.
Classification	Public core manual. Completed customer, technical and financial records follow their assigned access controls.

Application of requirements

“Shall” identifies a requirement when this manual is adopted by an organisation or agreement. “Should” identifies a recommendation. Worked examples are illustrative and supply no universal legal deadline, product limit or completed approval. Annexes provide record structures for controlled local implementation.

Publication and operational release

Stable Release identifies the completed publication text. Actual operating approvals, market obligations, technical validation and role authorisations shall be established by the responsible organisation. Mandatory law, applicable customer rights, approved product requirements and safe work instructions remain controlling for the specific operation.

IAF recognition

Using this manual does not itself confer membership, Corporate Recognised status, accreditation, certification or permission to use IAF marks. Those decisions follow the applicable IAF guides, independent evaluation and recorded scope.

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Using the operational annexes

Create a separate controlled record for each case. Expand the editable worksheets as needed and enter actual values, evidence links, responsible names and dates. Blank fields and worked examples are not proof of a completed activity.

1 Purpose and quality outcomes

1.1 This manual establishes a controlled customer journey from initial product information to verified vehicle delivery and early ownership support. It applies to digital channels, dealers, agents, contact centres, delivery providers and partners acting within the organisation sales process. The same factual and ethical controls shall apply across channels.

1.2 The intended outcomes are accurate configuration, transparent commercial terms, informed customer decisions, safe test driving and a vehicle whose physical and digital state matches the agreed order. A visually polished interface shall not compensate for incorrect specifications, hidden charges or a delivery record that overlooks an unresolved defect.

1.3 Each customer order shall connect the selected configuration, quoted price, contract version, payment events, allocated vehicle, inspection evidence and handover. Changes shall be attributable and communicated. The customer shall not need to reconstruct their history whenever responsibility moves between an online team and a dealer.

1.4 The accountable retail director shall provide resources and authority for quality holds and complaint resolution. Targets for conversion, registration or monthly deliveries shall not override product accuracy, customer rights or release conditions. Quality shall review both completed sales and journeys abandoned after errors or poor treatment.

2 Terms and journey states

2.1 A configuration is a versioned selection of vehicle attributes and options. A quote is a time bounded commercial offer under stated terms. A reservation holds a defined opportunity or vehicle subject to stated conditions. An order and a binding contract shall be distinguished according to the actual sales model and market requirements.

2.2 Allocation connects an order to a specific vehicle identity. Fulfilment comprises preparation, logistics and handover of the agreed vehicle and related services. Physical readiness and digital readiness are separate release dimensions. A registration event, payment receipt or transport arrival shall not independently establish delivery completion.

2.3 Digital ownership includes the intended account relationship, keys, permissions, subscriptions and connected services. It shall be distinguished from legal ownership and from finance or fleet authority. A customer account created during a test drive shall not automatically become the permanent owner account for a later purchased vehicle.

2.4 The journey dictionary shall define enquiry, configured, quoted, reserved, ordered, allocated, held, ready, handed over, cancelled and refunded. Each state shall have entry evidence and an owner. Automated systems shall prevent inconsistent states, such as a vehicle shown as delivered while an essential release hold remains open.

3 Roles authority and separation of decisions

3.1 The retail director owns channel performance and customer outcomes. Product data owners approve specifications and claims. Commercial owners approve pricing. Competent market reviewers approve contractual and consumer information. Delivery quality owns release evidence. Privacy and security functions control customer data and account protection.

3.2 Dealers and digital partners shall have written responsibilities for offers, customer contact, payments, order changes, complaints and fulfilment. Customers shall be told who is selling the vehicle and who provides related services. An agency or referral arrangement shall not obscure the accountable contracting party.

3.3 Staff may not approve their own exceptional discount, payment diversion or unresolved delivery defect where independent authority is required. Conflicts of interest involving finance, trade in valuation or partner referral shall be disclosed and managed. Incentives shall not reward withholding information or unnecessary products.

3.4 Any employee shall be able to raise a factual mismatch or safety concern. Designated quality personnel may hold an order or delivery within their authority. Lifting a hold shall require evidence and the appropriate decision maker; a month end target or a customer signature shall not serve as the release basis.

4 Market adoption and customer rights

4.1 Before offering a sales journey in a market, the organisation shall identify the selling entity, applicable customer rights, required disclosures, contract formation rules, tax treatment, vehicle registration conditions and permitted finance activities. Competent local reviewers shall maintain a controlled obligations record with ownership and review dates.

4.2 The journey shall explain rights and processes in language appropriate to the customer and channel. Cancellation, withdrawal, warranty and refund conditions shall reflect the actual market and transaction. This manual does not impose one global cooling off period or assume that every online interaction creates the same legal rights.

4.3 Mandatory rights shall not be hidden in secondary links, overridden by a blanket acknowledgement or presented as optional dealer goodwill. Where a contract includes separate providers or subscriptions, explain their responsibilities and the effect of cancellation or vehicle return on each related service.

4.4 Changes in products, sales model, territory or payment arrangements shall trigger a proportionate adoption review. Keep evidence that the live screens, printed documents and staff scripts implement the approved requirements. A reviewed contract template alone shall not demonstrate that the deployed customer journey is compliant.

5 Customer needs and inclusive service

5.1 The sales process shall begin with the customer's intended use, practical constraints and priorities. Discuss seating, accessibility, driving pattern, charging access, payload, budget and service needs without assuming that one powertrain or feature is suitable for everyone. Record only information necessary to support the requested assistance.

5.2 Provide accessible alternatives for customers who cannot complete the digital journey independently. A telephone or assisted channel shall preserve equivalent price information, choice and complaint access. Staff shall not interpret disability, language difficulty or low digital familiarity as permission to make choices on the customer's behalf.

5.3 Explain technical features through practical limitations and use cases. Confirm understanding of significant conditions such as charging dependencies, subscription expiry or driver assistance limits. Avoid overwhelming the customer with a rapid sequence of acknowledgements that obscures a decision with material cost or safety implications.

5.4 The customer shall be free to pause, compare or seek advice. Pressure based on unsupported scarcity, personal circumstances or staff targets shall be prohibited. Review complaints and abandoned journeys for barriers that may not appear in conversion statistics, and assign owners to improve the affected channel.

6 Product master data and ownership

6.1 A controlled product master shall define model, variant, market, model year, powertrain, dimensions, capacities, equipment and compatibility. Each attribute shall have an accountable owner, approved source, effective period and revision history. Digital channels and dealer systems shall consume released data rather than maintain competing unofficial spreadsheets.

6.2 Distinguish standard equipment, optional equipment, accessories, subscriptions and future planned functions. Availability shall reflect the actual market and build configuration. A feature offered on another variant or in another territory shall not appear as included simply because the model family shares a marketing name.

6.3 Product changes shall identify affected configurators, price lists, quotes, orders and allocated stock. Where a change affects an existing customer commitment, the order owner shall review the impact and obtain the required agreement. Updating the website shall not silently amend an earlier contract.

6.4 Data quality checks shall detect missing units, conflicting values, obsolete options and inconsistent translations. Defects affecting customer choice shall trigger containment of the relevant offer. Corrections shall preserve the earlier published version and record whether affected customers need direct explanation or a revised option.

7 Configuration rules and valid combinations

7.1 The configurator shall enforce released compatibility rules for the selected market and vehicle version. Rules shall cover powertrain, battery, wheels, seating, towing, accessories, packages and software dependent features where relevant. A customer shall not be allowed to order an impossible combination merely because individual options are separately available.

7.2 When one selection adds, removes or changes another item, the interface shall explain the effect and price before confirmation. Hidden automatic substitutions shall be prohibited. Provide a clear route to compare the previous and revised configuration and to return to the earlier valid choice.

7.3 Rules shall distinguish technical incompatibility, commercial availability and temporary supply constraints. This distinction matters when a customer asks whether an option is unsafe, unsupported or simply unavailable for the selected build. Staff explanations shall match the actual rule reason.

7.4 Configuration changes shall create a new version and preserve the customer's selected state. The system shall test rule interactions, including unusual combinations and boundary conditions. Manual dealer overrides shall require defined authority, technical validation and evidence that the resulting order can be fulfilled as described.

8 Variant compatibility and accessory fitment

8.1 Accessory and option compatibility shall be verified against the exact vehicle configuration, including production changes and regional differences. A model name match shall not be sufficient where mounting points, electrical architecture, battery arrangement or software capability differ. The approved fitment record shall identify these conditions.

8.2 Accessories affecting load, range, visibility, sensing, towing or charging shall have accurate installation and use information. The sales journey shall disclose material limitations and any required additional equipment. An accessory shall not be advertised as universally compatible when a technical assessment is still pending.

8.3 Dealer installed items shall be included in the order, preparation plan and final inspection. Record the approved part, installer competence and required calibration or verification. A last minute accessory addition shall trigger a review of delivery timing and the affected physical or digital checks.

8.4 If a selected accessory becomes unavailable, present technically supported alternatives with clear price and functional differences. Customer acceptance shall be recorded before substitution. The original item shall not remain on the invoice or digital vehicle record after a different configuration has been supplied.

9 Images descriptions and visual accuracy

9.1 Product images, renders and interactive views shall correspond to the selected configuration or clearly identify illustrative differences. Material attributes such as body style, wheel design, seating and included equipment shall not be concealed behind a generic image that suggests a more expensive specification.

9.2 Colour appearance can vary by display and lighting; explain this where relevant and provide a practical verification route when colour choice is material. This limitation shall not excuse showing the wrong paint option or using an image that inaccurately represents the ordered finish.

9.3 Claims in captions, comparison tables and salesperson presentations shall use approved product data. Do not imply that a displayed concept feature, prototype interface or future software function is delivered with the current vehicle unless it is actually included and released for that order.

9.4 Visual assets shall have owners, version identifiers and market applicability. Quality checks shall compare screenshots with the configuration and order summary across supported devices. When a misleading image is corrected, assess whether existing quotes or orders require customer contact rather than assuming the correction resolves prior exposure.

10 Range charging and performance information

10.1 Range, charging time, energy use and performance claims shall state the relevant test basis and conditions in understandable terms. Explain material influences such as temperature, route, load, charging equipment and battery condition. An indicative calculator result shall not be presented as a guaranteed result for every customer journey.

10.2 Charging information shall distinguish connector compatibility, available power, vehicle capability and site conditions. A charger headline rating shall not be described as a constant vehicle charging rate. Show whether home installation, network access or a subscription is included, optional or supplied by another party.

10.3 Customer suitability discussions shall consider actual access to charging and typical travel needs. Staff shall not promise effortless charging everywhere or omit limitations because they may reduce conversion. Where an estimate depends on customer input, retain the assumptions and explain that changed conditions can alter the outcome.

10.4 Product owners shall review numerical claims, units and calculator logic before release and after relevant changes. If reliable data is unavailable for a variant, mark the information as unavailable or provisional in the approved manner and avoid accepting a firm performance promise into the order.

11 Driver assistance features and limitations

11.1 Driver assistance descriptions shall state the functions actually delivered, operating limits and driver responsibilities. Marketing language shall not imply unrestricted autonomous driving when the vehicle requires active supervision. Distinguish currently enabled functions from hardware preparation, future development and separately purchased entitlements.

11.2 The sales team shall explain material limitations relevant to the customer's intended use, including situations where assistance may be unavailable or require intervention. Demonstrations shall follow the approved safe method and shall never encourage distraction, misuse or deliberate exposure to a hazard to prove a feature.

11.3 Feature names and icons shall be reviewed for misleading implications across languages and markets. A disclaimer in a remote document shall not correct a prominent unsupported promise made by a salesperson or configurator. Staff shall use consistent approved explanations and record significant customer questions.

11.4 The order and handover shall identify the delivered feature set and any activation prerequisites. Software changes affecting functionality shall follow the controlled product and customer communication process. A future capability shall not be treated as a completed delivery item or used to close a present mismatch.

12 Subscriptions and digital entitlements

12.1 The offer shall distinguish permanently included functions, time limited trials, renewable subscriptions and pay per use services. State duration, renewal behaviour, price basis, cancellation route and what happens at expiry. A trial shall not appear as a permanent included feature in the vehicle specification summary.

12.2 Explain dependencies such as connectivity, account eligibility, supported territory and compatible devices. Customers shall understand which functions remain available without a subscription and which depend on a third party. Essential safety and release requirements shall not be obscured by an optional service package description.

12.3 Entitlements shall be linked accurately to the vehicle, account or customer according to the product rules. Fleet use, resale and account transfer shall have explicit handling. A service purchased by a previous user shall not be assumed to transfer automatically with the vehicle.

12.4 At delivery, verify the promised entitlements and start dates. Do not activate a paid period early for administrative convenience without the agreed basis. Failed activation shall remain an open fulfilment issue with an owner, and the customer shall receive an honest explanation of the available remedy.

13 Price transparency and total payable amount

13.1 The customer shall see the vehicle price, selected options, mandatory charges and applicable taxes in a clear order summary before commitment. Identify the currency and whether an amount is fixed or subject to a stated verified condition. Known mandatory fees shall not appear only at the final payment step.

13.2 Optional products and services shall require an affirmative choice and shall be removable without misleading friction. The journey shall not preselect unwanted additions or imply that an optional item is necessary to obtain the advertised vehicle. Any genuine dependency shall be explained before selection.

13.3 Where a cost cannot yet be determined, state why, how it will be calculated and when a firm amount will be provided. Do not use an artificially low headline price that depends on undisclosed eligibility, financing or trade in assumptions. Comparisons shall use consistent inclusions.

13.4 Price changes shall be versioned and reconciled across website, dealer quote, contract and invoice. Existing commitments shall be reviewed under their actual terms and market obligations. A software update to the price master shall not authorise a dealer to demand an unexplained additional payment at delivery.

14 Discounts promotions and eligibility

14.1 Promotions shall state the eligibility conditions, validity period, applicable vehicles and any required combination with finance or trade in. Staff shall verify the customer actual eligibility before presenting the discounted total as available. A possible incentive shall be labelled clearly until the necessary evidence is confirmed.

14.2 Claims of limited availability or deadlines shall be supported by the actual programme or stock condition. Repeated countdown resets and invented last vehicle statements shall be prohibited. The customer shall have sufficient information to distinguish a temporary offer from an ordinary negotiated price.

14.3 Discount authority shall be assigned by role, with independent approval for exceptions. Record the reason and effect on the final payable amount. Incentives shall not be exchanged for withdrawal of a legitimate complaint, a favourable review or acceptance of an undisclosed defect.

14.4 At order confirmation, preserve the offer version and verified eligibility. If a programme changes before fulfilment, the case owner shall determine the contractual and market implications and explain the outcome. The customer shall not be surprised by a lost discount caused by an internal processing delay that was never disclosed.

15 Finance information and referral controls

15.1 Where finance is discussed, identify the provider, the dealer role and any relevant referral relationship. Only authorised personnel shall perform activities requiring specific competence or permission. General sales staff shall not promise approval, provide unsupported personalised financial advice or conceal a material commission conflict.

15.2 The customer shall receive the required finance information in a form suitable for comparison, including deposit, term, payment schedule, total amount payable, final payment and significant conditions. A low monthly amount shall not obscure a large final payment or a different total cost. Use the approved market specific calculation and disclosure process.

15.3 Credit eligibility, document collection and decisions shall follow the provider controlled route. Collect sensitive information securely and only as needed. A salesperson shall not alter income details, omit commitments or coach a customer to provide misleading information to obtain approval.

15.4 Finance approval shall remain distinguishable from vehicle order acceptance and delivery release. Explain the consequences if approval fails or expires. A finance condition shall not be represented as satisfied until verified, and changes to vehicle price or specification shall be reconciled with the financing documents before commitment.

16 Trade in valuation and condition evidence

16.1 Trade in offers shall state the vehicle identity, valuation basis, inspection assumptions, validity period and conditions that may change the amount. An online estimate shall be identified as an estimate where a physical assessment remains necessary. Explain the process before the customer relies on it to fund an order.

16.2 The assessment shall record mileage, condition, history information provided and material discrepancies using a consistent method. Photographs shall be proportionate and linked to the vehicle. Existing damage shall not be invented or exaggerated to recover a previously offered discount.

16.3 Any revised valuation shall have a documented reason and a customer review route. Separate observed condition from uncertain assumptions about repair cost or resale value. Staff with a financial interest in a particular outcome shall follow the conflict management process.

16.4 Before transfer, verify authority to dispose of the vehicle and resolve finance or ownership restrictions through the applicable process. Record keys, documents, personal property and digital account removal. The customer shall understand when possession and contractual responsibilities change, rather than relying on an ambiguous handover receipt.

17 Stock availability and delivery promises

17.1 Stock systems shall distinguish available, reserved, allocated, in transit, demonstration, held and sold vehicles. Each status shall have an owner and evidence. A vehicle subject to a safety hold, unresolved damage or another customer allocation shall not appear as immediately ready for sale and delivery.

17.2 Delivery estimates shall reflect production, transport, preparation and digital readiness dependencies. Identify whether a date is an estimate or a confirmed commitment. Do not promise a handover date solely from an unverified system forecast or a transport arrival that leaves no time for required inspection.

17.3 When availability changes, update all affected channels and contact customers whose commitments are affected. Explain alternatives, relevant rights and the next reliable milestone. Repeated automated reassurance shall not replace a real investigation into a delayed or incorrectly allocated order.

17.4 Management shall review aged reservations, duplicate allocations and optimistic promises. Staff incentives shall not encourage booking orders against unavailable inventory without disclosure. A customer decision to wait shall be recorded without treating it as permission for unlimited delay or an uncommunicated specification substitution.

18 Quote identity and version control

18.1 Each quote shall have a unique identifier, issue date, validity, selling entity and configuration version. Include vehicle specification, options, accessories, price components and important assumptions. The customer shall be able to retain the quote and understand what is included without reconstructing a browsing session.

18.2 Changes shall generate a new version showing material differences in specification, price and timing. Preserve prior versions and the customer response. A salesperson shall not overwrite an accepted quote to make a later discrepancy appear to have been agreed from the start.

18.3 The quote shall distinguish estimated trade in value, conditional incentives and pending finance from confirmed amounts. Explain any condition that must be resolved before a binding order. Avoid a single net figure that hides several uncertain components with different decision owners.

18.4 Before conversion to order, reconcile the quote against current product validity and the customer's selected terms. Resolve discrepancies explicitly. Automated conversion shall carry the exact agreed version, and manual reentry shall receive a comparison check to prevent option omissions and unintended price changes.

19 Configurator release and regression procedure

Use this procedure before releasing product rules, pricing logic, visual assets or a material user journey change.

Step and owner	Required action and retained evidence
1 Product owner	Define the affected models, markets, options, claims and effective dates. Supply approved data and expected outcomes.
2 Digital quality	Create tests for ordinary selections, incompatible combinations, price dependencies, unavailable stock and incomplete data.
3 Test operator	Run supported device, language and accessibility checks. Compare displayed configuration, images, total price and saved quote.
4 Integration owner	Verify transfer into dealer, ordering, payment and fulfilment systems without lost options or changed identifiers.
5 Independent reviewer	Review failures and retest corrections. Confirm that existing saved quotes and orders receive the intended change treatment.
6 Release owner	Record approval, deploy the controlled version, monitor live transactions and retain a rollback or containment plan.

Acceptance requires correct commercial meaning and downstream order integrity. A page that loads quickly but produces a wrong vehicle or price shall fail release.

20 Lead intake and contact preferences

20.1 Lead forms shall state the requested service and collect only information needed to respond. Separate a request for a quote or test drive from permission for unrelated marketing. Optional contact choices shall be clear, unbundled where required and respected across dealers and central systems.

20.2 The intake record shall identify source, customer request, preferred channel, relevant time constraints and the notice version presented. Staff shall not create a false consent entry because the customer provided a telephone number for a specific appointment. Purchased or transferred leads shall have a verified permitted purpose.

20.3 Contact attempts shall be proportionate and coordinated. Multiple dealers shall not repeatedly contact the same person without a clear basis and ownership. Provide an effective route to change preferences or stop optional contact while preserving necessary communications about an active order.

20.4 Lead quality reviews shall consider response accuracy and customer experience as well as conversion. Duplicate, invalid or withdrawn leads shall be handled transparently. Deleting an inconvenient lead shall not conceal a complaint, a pricing error or a failure to respond to an existing customer request.

21 Customer relationship records and channel continuity

21.1 The customer relationship record shall preserve the current request, agreed configuration, contact preferences, commitments and unresolved concerns. Access shall be limited by role and purpose. Staff shall record factual, respectful notes that another colleague can use without exposing unnecessary personal information or subjective labels.

21.2 When a journey moves from online to dealer or between locations, transfer the relevant record through an approved process. Confirm the receiving owner and customer expectation. The customer shall not lose an agreed quote or have to repeat a complaint because internal systems use different identifiers.

21.3 Duplicate records shall be merged only through a verified identity process that preserves history and avoids combining different people. Shared household contact details shall not establish that all users have the same permissions. Fleet and business relationships shall identify the authorised representative for each action.

21.4 Quality shall sample promised callbacks, unresolved tasks and changes to customer data. Overdue actions shall escalate to an accountable owner. A record marked contacted shall describe the actual outcome; an unanswered automated message shall not be represented as a completed discussion or accepted change.

22 Identity checks and sales fraud prevention

22.1 Identity verification shall be proportionate to the stage and risk of the transaction. Browsing and general enquiries shall not require the same evidence as financing, registration or release of a vehicle. The process shall identify the purpose, accepted evidence, authorised reviewer and handling of exceptions.

22.2 Where an organisation or representative purchases a vehicle, verify authority to contract, pay and receive delivery. A familiar email address or possession of a quote shall not be sufficient for a high risk change. Changes to delivery recipient or payment route shall receive independent confirmation through a trusted channel.

22.3 Fraud indicators shall prompt a fair review rather than automatic accusations. Protect legitimate customers from excessive or discriminatory checks. Staff shall avoid collecting unnecessary identity images or transferring sensitive documents through personal accounts.

22.4 Suspected impersonation, altered payment evidence or account compromise shall trigger the defined incident route. Preserve relevant records and restrict the affected action while maintaining clear customer communication. A commercial deadline shall not justify releasing a vehicle before identity and payment conditions have been verified.

23 Customer account security

23.1 Customer accounts shall use an approved authentication and recovery process appropriate to the functions they control. Protect changes to identity, payment, delivery address and digital vehicle access with additional verification where required. Passwords and recovery secrets shall never be requested by sales or delivery staff.

23.2 Account recovery shall confirm the legitimate user through a controlled route and shall not rely solely on information visible in a sales file. Record sensitive changes and notify the appropriate verified contact. A dealer employee shall not create a permanent account using their own email address for customer convenience.

23.3 Sessions on showroom devices shall end cleanly, with local data and credentials removed through the managed device process. Customers shall be able to complete sensitive steps privately. Screen sharing shall avoid exposing payment information, identity records or secret authentication codes.

23.4 Security events shall be reviewed for their effect on active orders and vehicle access. A compromised account may require temporary restrictions and a verified recovery plan. Restoration shall include checking the intended owner relationship and permissions, not merely resetting a password and assuming all prior changes were legitimate.

24 Privacy choices and data handling

24.1 The journey shall explain what customer information is used, for which purposes, by whom and for how long under the applicable privacy arrangements. Separate sales administration, financing, test drive management, connected services and optional marketing where their purposes or responsible parties differ.

24.2 Cookie and tracking choices shall be implemented accurately and shall not be presented through misleading controls. Optional tracking shall not be enabled merely because the customer continues browsing where a separate choice is required. The live system shall be tested against the stated preference, including partner integrations.

24.3 Access to customer records shall follow role and case need. Exporting an entire contact list to resolve one order shall be prohibited unless a justified approved process requires it. Retention and deletion shall consider actual obligations and disputes without keeping all information indefinitely by default.

24.4 Customer requests to access, correct or otherwise exercise applicable data rights shall enter the controlled privacy process. Staff shall preserve ongoing service continuity while the request is handled. Deleting an account shall not silently cancel a vehicle order or destroy records needed to address a legitimate complaint.

25 Accessibility and assisted digital journeys

25.1 Digital journeys shall be designed and tested for users with different visual, motor, cognitive and communication needs. Provide readable structure, clear labels, keyboard operation, understandable error messages and alternatives to information conveyed only through colour, sound or imagery.

25.2 Critical actions such as reviewing price, choosing options, signing and requesting a refund shall remain usable with supported assistive technologies. Time limits shall be justified and provide an appropriate extension or recovery route. A failed form shall preserve relevant entered information securely rather than forcing repeated disclosure.

25.3 Assisted service shall support the customer's own decision. Staff shall read or explain material terms accurately and confirm selections without pressuring or substituting their preferences. Where a representative is involved, verify the scope of authority and maintain the customer privacy.

25.4 Testing shall include representative tasks with users or competent evaluators, alongside technical checks. Record barriers by severity and effect on completion. A visually attractive page shall not pass release when a customer cannot reach a mandatory disclosure, correct an error or complete the same purchase through an accessible route.

26 Automated customer assistance

26.1 Chat assistants and recommendation tools shall operate within a defined scope using controlled product and policy information. Inform customers when they are interacting with automation where appropriate and provide a practical route to a person. The system shall not invent stock, discounts, delivery dates or contractual rights.

26.2 Recommendations shall be based on relevant customer needs and disclosed commercial logic. Avoid using sensitive or unrelated personal information to manipulate urgency or price. A suggested configuration shall remain reviewable, with clear reasons and the ability to change or decline it.

26.3 High impact matters such as finance eligibility, legal rights, safety concerns and disputed payments shall escalate to authorised personnel. Automated wording shall not be accepted as a binding technical or legal determination without the controlled review required for that decision.

26.4 The owner shall retain version, approved knowledge scope, evaluation results and monitored failures. Test misleading prompts, unsupported questions and ambiguous vehicle variants. Correct material misinformation and identify affected customers where feasible; quietly updating the assistant shall not resolve an already communicated false promise.

27 Online order acceptance procedure

Use a controlled sequence that lets the customer review and correct the order before the defined commitment point.

Step and owner	Required action and retained evidence
1 Customer and channel	Select a valid configuration and show the exact vehicle, options, services and availability assumptions.
2 Commercial system	Present the total payable amount, conditional items, deposit treatment and relevant timing without hidden additions.
3 Contract owner	Identify the selling entity, contract terms, formation event and applicable cancellation or withdrawal information.
4 Customer	Review a durable summary, correct errors and provide the required affirmative instruction through the approved signature or acceptance method.
5 Order system	Validate payment or finance conditions, preserve the accepted versions and issue an accurate acknowledgement distinguishing pending from accepted status.
6 Order owner	Reconcile the downstream order, assign a contact and communicate the next milestone. Resolve any mismatch before allocation or fulfilment proceeds.

An acknowledgement shall not imply unconditional acceptance if the actual process still requires review. The customer shall be told precisely what has and has not been confirmed.

28 Reservations and deposits

28.1 A reservation offer shall define what is held, for how long, at what cost and under what conditions it becomes an order. Distinguish a specific vehicle reservation from a position in a future allocation process. Do not imply guaranteed delivery or fixed specification where those matters remain unresolved.

28.2 Deposit terms shall explain whether the amount is refundable, credited to the price or subject to stated conditions, consistent with applicable rights. The customer shall see these terms before payment. A label such as administration fee shall not obscure the actual nature of the charge.

28.3 The reservation system shall prevent duplicate commitments and shall expire or renew holds through a controlled process. Notify the customer of material changes and provide a route to respond. Staff shall not retain a deposit indefinitely because an internal order conversion task was overlooked.

28.4 Deposit receipts, order conversion, cancellation and refund shall be reconciled to the same transaction identity. If the promised vehicle becomes unavailable, the customer shall receive a clear explanation and applicable options. A different vehicle shall not be substituted automatically on the assumption that the deposit commits the customer to any available stock.

29 Contracts signatures and durable evidence

29.1 The contract record shall identify the parties, vehicle specification, commercial terms, applicable services and accepted version. The signature or acceptance process shall establish the intended signer and preserve evidence of the action. Local requirements shall determine the appropriate method and any additional formalities.

29.2 The customer shall have a reasonable opportunity to read, retain and correct the information before acceptance. Material terms shall not be hidden behind inaccessible links or changed between review and signature. Provide the completed agreement in a durable form through the verified contact route.

29.3 Electronic evidence shall connect the accepted text, time, signer verification and system event without claiming that a simple click proves every possible authority issue. Where an organisation signs, retain the representative authority. Amendments shall have their own traceable agreement and shall not overwrite the original.

29.4 Quality shall test that signed documents can be retrieved and matched to the order over the required retention period. A failed document generation or delivery event shall create an exception for resolution. Registration or payment shall not be used to conceal missing evidence of the actual agreed terms.

30 Payment integrity and reconciliation

30.1 Payment instructions shall identify the authorised recipient and approved channels. Changes to bank details or payment destination shall require controlled approval and independent verification through a trusted contact route. Staff shall not ask customers to follow a new payment instruction solely because it arrived in an urgent email.

30.2 Payment systems shall protect sensitive information and provide clear transaction status. Sales staff shall not collect full card credentials in notes, photographs or messaging applications. A screenshot or customer statement that a transfer was made shall not substitute for verified receipt and reconciliation.

30.3 Reconcile amount, currency, payer, order and payment purpose, including deposits, balance payments and refunds. Investigate duplicate, partial, excess or third party payments through the approved process. Do not release a vehicle by manually marking a disputed payment as settled without authorised evidence.

30.4 Customers shall receive accurate receipts and a route to report suspected payment fraud. Financial review shall preserve separation between receipt confirmation and sales incentives. A payment delay shall be explained factually, while any contractual consequence follows the actual terms and applicable customer rights.

31 Finance approval and order handoff

31.1 The order owner shall distinguish submitted, conditionally approved, fully approved, expired and declined finance status. Only the responsible finance provider or authorised process may confirm the decision. Staff shall not present a preliminary eligibility indication as final funding approval.

31.2 Conditions such as identity evidence, deposit, vehicle specification and delivery timing shall be tracked with owners. Changes to price, accessories or vehicle identity shall be reconciled with the finance documents before delivery. An outdated approval shall not be assumed to cover a materially different transaction.

31.3 If finance is declined or conditions cannot be met, communicate the result through the appropriate confidential route and explain available order options. Avoid pressuring the customer into a more expensive product or asking them to alter truthful information. Any new application shall follow the approved process.

31.4 The delivery release record shall verify funding conditions without exposing unnecessary financial details to all staff. Retain evidence of the authorised confirmation and any outstanding restrictions. Commercial handoff is complete only when responsibilities for payment, contract and customer communication are clear.

32 Order changes and cancellations

32.1 Customers shall have a clear route to request changes or cancellation. Record the request time, current order state, requested action and applicable terms. Staff shall acknowledge receipt and identify the decision owner rather than allowing the request to remain in an unattended general inbox.

32.2 Before agreeing a change, assess configuration validity, price, production status, finance, accessories and delivery timing. Explain the material consequences and obtain the required customer instruction. A changed option shall not silently remove another feature or reset a promised price without disclosure.

32.3 Cancellation decisions shall reflect the actual contract and applicable rights. This manual establishes no universal cancellation fee or deadline. Where a cost is legitimately due, provide a clear basis and review route. Mandatory rights shall not depend on the customer accepting a replacement vehicle.

32.4 Approved changes shall update every affected system and preserve the prior version. Cancellation shall trigger allocation release, finance coordination, payment or refund handling and communication to delivery partners. Verify completion so that a cancelled order is not shipped, registered or contacted as an active sale.

33 Refund control procedure

Use this procedure for approved refunds arising from cancellation, overpayment, correction or another justified event. Market specific timing and rights remain controlling.

Step and owner	Required action and retained evidence
1 Case owner	Record the request, reason, order, payment history and relevant contractual or customer rights assessment.
2 Authorised reviewer	Confirm eligibility and amount, with itemised deductions only where justified and permitted. Explain the decision and review route.
3 Finance operator	Verify the original payment and intended recipient. Use the approved return route; independently review any requested alternative destination.
4 Approver	Check segregation of duties, duplicate refund risk, currency and supporting evidence before authorising release.
5 Finance operator	Execute through the approved channel and record the transaction reference, date and actual status.
6 Case owner	Notify the customer accurately, reconcile the ledger and order, and follow up failed or returned payments until resolved.

A refund marked approved is not yet paid. Reports shall distinguish approval, execution and confirmed settlement, and shall identify overdue cases for action.

34 Order tracking and proactive communication

34.1 Tracking shall show meaningful milestones supported by actual evidence, such as accepted order, confirmed allocation, transport departure, inspection complete and delivery ready. Avoid decorative progress indicators that imply movement when no underlying event has occurred.

34.2 Each active order shall have an accountable contact and a communication plan proportionate to its duration and uncertainty. Explain delays with known facts and the next decision point. Where the cause is still being investigated, say so rather than inventing a reassuring date.

34.3 Material changes in specification, price, vehicle condition or delivery timing shall receive direct communication through the agreed route. An update hidden in a portal shall not be assumed to constitute informed agreement. Record the customer response and any revised commitment.

34.4 Management shall review orders with repeated date changes, stale milestones or conflicting channel messages. The root cause may be data integration, planning or ownership rather than an individual communication failure. Correct the process and assess affected customers, including those who cancelled after unreliable information.

35 Dealer conduct and fair selling

35.1 Dealer staff shall provide accurate information, respect customer choices and disclose relevant commercial relationships. The customer shall be able to compare options without intimidation or misleading urgency. Staff shall not withhold keys, documents or a trade in vehicle to pressure acceptance of additional products.

35.2 Optional accessories, protection products and services shall be explained with their actual benefits, limits and price. Do not describe an optional item as compulsory unless a verified condition genuinely requires it. A customer refusal shall be recorded without repeated pressure or a concealed change to the agreed vehicle price.

35.3 Negotiated terms shall be documented promptly. Verbal promises about repairs, included equipment, charging support or delivery shall be reconciled into the order where agreed. Staff shall not rely on an entire agreement clause as a reason to make unsupported promises during the sale.

35.4 Dealer reviews shall include observed interactions, complaints and transaction evidence. Targets and remuneration shall be assessed for behaviours they encourage. Repeated misrepresentation shall trigger corrective action, supervision or suspension of the affected activity rather than a script update alone.

36 Conflicts incentives and partner referrals

36.1 The organisation shall identify incentives that may conflict with customer needs or objective quality decisions. These include finance commissions, accessory margins, trade in targets, referral payments and registration bonuses. Define disclosure, approval and independent review appropriate to each arrangement.

36.2 Staff shall not steer a customer toward a product by concealing a relevant cheaper or more suitable available option within the agreed advisory scope. Recommendations shall be supported by the customer stated needs and accurate product information. A commission opportunity shall not become a technical requirement.

36.3 Gifts, personal relationships and interests in partner businesses shall be declared through the conflict process. An alternative decision maker shall review affected valuations, exceptions or complaints. Customer information shall not be passed to a partner merely to generate a referral fee without a valid permitted purpose.

36.4 Management shall test whether incentives correlate with cancellations, complaints, unsuitable additions or rushed deliveries. Adjust remuneration and supervision when evidence shows harmful behaviour. Meeting sales targets shall not excuse a pattern of misleading offers or unresolved fulfilment defects.

37 Showroom and demonstration readiness

37.1 The showroom shall present vehicles, prices and feature descriptions that match current approved information. Display labels shall distinguish demonstration vehicles, optional equipment and unavailable features. A display vehicle with a different specification shall not be used to imply that every advertised price includes the same equipment.

37.2 Vehicles shall be clean, secure and suitable for customer access. Control keys, charging cables, moving displays and other hazards. Staff shall inspect access routes and provide assistance without blocking customer independence. Damaged or unsafe demonstration equipment shall be removed from use.

37.3 Digital kiosks shall use managed accounts and reset between users. Customer information entered during a demonstration shall not remain visible to the next visitor. Staff shall avoid storing personal account credentials to make future demonstrations faster.

37.4 Daily readiness checks shall cover vehicle condition, price accuracy, device functionality and appointment commitments. Record defects and ownership for correction. A showroom may remain open while a specific vehicle or service is restricted, provided the restriction is effective and staff do not bypass it for convenience.

38 Test drive eligibility and authority

38.1 The test drive process shall verify the driver eligibility for the vehicle and location, including licence validity and any relevant conditions through the approved local method. Confirm insurance and permission arrangements before release. Do not assume that an ordinary customer identity check proves driving entitlement.

38.2 Explain the route, duration, supervision model, responsibilities and incident process before the drive. Any charges, deposits or potential liability terms shall be clear and consistent with applicable rights. The customer shall have an opportunity to ask questions and decline without inappropriate pressure.

38.3 Staff shall consider fitness to drive and practical needs using respectful, objective criteria. Apparent impairment, inability to understand essential controls or unsafe behaviour shall trigger a pause and an alternative arrangement. Eligibility decisions shall not rely on irrelevant stereotypes or discriminatory assumptions.

38.4 Record the verified driver, vehicle, authorised passengers and agreed conditions with proportionate data handling. A change of driver or vehicle shall require rechecking the applicable conditions. A signed form shall not permit an otherwise unsafe drive or replace the dealer responsibility to provide a suitable vehicle.

39 Test fleet readiness and release

39.1 Each test vehicle shall have a controlled readiness record covering maintenance, damage, tyres, fluid conditions, required equipment and open safety actions. Check the vehicle before each assignment at the level defined by the risk and use pattern. A previous day check shall not establish current condition after intervening use.

39.2 Confirm that the vehicle specification and features match the planned demonstration. Software and entitlements shall be approved and stable for customer use. Experimental functions or unresolved diagnostic concerns shall not be included in an ordinary public road test without a separately authorised controlled programme.

39.3 Battery charge or fuel shall support the planned route with an appropriate operating margin. Charging cables and personal items shall be secured. The vehicle shall not be released with a safety restriction simply because the appointment is already waiting.

39.4 The release record shall connect vehicle identity, driver, readiness checks, keys and planned return. Defects discovered during preparation shall trigger repair, substitution with explanation or rescheduling. Staff shall not reset warnings or conceal damage to preserve the appointment schedule.

40 Test route and demonstration plan

40.1 The route shall support the customer evaluation objectives within safe and lawful conditions. Consider traffic, road type, weather, charging needs, vehicle size and driver familiarity. The plan shall avoid locations that require unsafe manoeuvres or create pressure to demonstrate performance beyond normal driving.

40.2 Before departure, explain essential controls, visibility adjustments, starting and stopping, parking and any unfamiliar operation. The customer shall be comfortable controlling the vehicle before joining traffic. Configure navigation and data logging while stationary rather than asking the driver to interact with screens during the test.

40.3 Driver assistance demonstrations shall follow a released plan with clear limits and driver responsibility. Do not create a hazard to test automatic intervention. An accompanied staff member shall prioritise safe observation over a continuous sales presentation that distracts the driver.

40.4 Define what to do if the driver becomes uncomfortable, the route is blocked or the vehicle shows a warning. The plan shall allow an early safe return or professional assistance. A test drive shall not need to complete a fixed route or duration when conditions make continuation inappropriate.

41 Test drive operating procedure

Apply the sequence to each authorised driver and vehicle. The dealer shall adapt the record to local conditions without removing essential readiness and safety gates.

Step and owner	Required action and retained evidence
1 Host	Confirm booking, driver eligibility, authority, insurance arrangements and the customer evaluation needs.
2 Fleet custodian	Verify vehicle readiness, safety action status, condition, fuel or charge and the intended feature set.
3 Host and driver	Explain controls, route, responsibilities and incident actions while stationary. Agree passengers and the supervision arrangement.
4 Driver and host	Conduct the drive within the approved plan. Avoid distraction and stop safely if conditions or vehicle behaviour become unsuitable.
5 Receiving host	Record return, condition, keys, observations and any incident or new defect. Keep a suspect vehicle unavailable pending review.
6 Customer coordinator	Discuss findings accurately, answer questions, remove personal data and agree any next step without pressuring an immediate purchase.

The test record shall describe what occurred. A successful drive does not establish a complete vehicle inspection or justify an unsupported promise about all future operating conditions.

42 Driver assistance demonstrations

42.1 Before demonstrating an assistance function, the host shall verify that it is released, enabled and appropriate for the vehicle, route and conditions. Explain what the function does, when it may be unavailable and the driver's continuing responsibility. The customer shall not be encouraged to treat assistance as unrestricted autonomy.

42.2 Demonstrations shall never deliberately create a collision risk, remove required driver attention or defeat a safeguard to make the feature appear impressive. A parking or manoeuvring demonstration shall use a suitable controlled space and the approved method, with bystanders protected.

42.3 If the function behaves unexpectedly or cannot operate under the current conditions, stop the demonstration safely and explain the limitation. Do not repeatedly attempt activation in live traffic or dismiss a warning as a normal sales demonstration issue without technical review.

42.4 Record material customer questions and any technical anomaly. The vehicle shall be held where the finding affects safe use. Sales material and training shall be corrected when repeated misunderstandings show that the feature explanation is misleading, even if the underlying product functions as designed.

43 Incidents during test drives

43.1 The test drive plan shall provide a clear response to collision, injury, breakdown, warning or other unsafe condition. Immediate actions shall prioritise people and the applicable local emergency process. Staff shall not delay assistance while attempting to determine customer liability or protect a sales result.

43.2 The host or case owner shall arrange competent support and secure the vehicle through the appropriate response. Do not ask an untrained customer to inspect damaged electrical systems or continue driving a vehicle with an unresolved safety concern. Battery related signs shall follow the incident and recovery route.

43.3 Record facts, parties, vehicle condition and available evidence without coaching accounts or assigning blame prematurely. Photographs shall be taken only when safe and proportionate. Insurance and financial decisions shall follow their own review and shall not alter the original technical or customer statement.

43.4 The vehicle shall remain unavailable until the competent function assesses and releases it. The customer shall receive an accountable contact and a clear explanation of next steps. Review the incident for vehicle, route, briefing and supervision improvements, including near misses that caused no visible damage.

44 Test vehicle return and condition review

44.1 At return, the receiving host shall confirm vehicle identity, driver, keys, mileage or usage information where relevant and reported concerns. Inspect condition using the approved method and compare it with the predrive record. Identify new findings without assuming they were caused by the customer.

44.2 Damage assessment shall distinguish visible evidence, timing uncertainty and technical significance. Automated image comparisons may support review but shall not alone determine liability or charges. The customer shall have an opportunity to provide their account and use the applicable dispute process.

44.3 Warnings, unusual behaviour and safety concerns shall transfer to technical personnel. The vehicle shall not be rebooked until the required assessment is complete. A clean exterior or an uneventful return to the showroom shall not prove that a reported intermittent fault is resolved.

44.4 Replenish and prepare the vehicle through the controlled readiness process, including data removal and any required charging. Record the next availability state. A rapid turnaround target shall not erase the previous driver observations or bypass a release hold.

45 Demonstration data removal

45.1 Test drives and showroom demonstrations may create phone pairings, navigation history, contacts, account links and stored preferences. The operation shall identify the data created by each demonstration mode and provide a verified reset method that preserves required vehicle configuration while removing customer information.

45.2 Before the next user, remove the previous user data and terminate temporary access through the approved process. Do not rely only on hiding a profile or disconnecting a phone if information remains accessible elsewhere. Check relevant vehicle and linked service interfaces for residual access.

45.3 Customers shall be advised to avoid entering unnecessary sensitive information into demonstration systems. Staff shall not photograph private screens or retain account credentials. If the customer needs help removing data from their own device, provide guidance without taking possession of secret authentication information.

45.4 The readiness record shall identify completion of the reset and any unresolved platform issue. A vehicle with residual customer access shall remain restricted from further demonstration until corrected. Retain only the evidence needed to show the process occurred, not copies of the personal content removed.

46 Vehicle allocation and identity reconciliation

46.1 Allocation shall link one accepted order to a specific vehicle identity through an authorised process. Compare model, variant, market, colour, options, accessories and relevant software or hardware capability. A similar vehicle shall not be treated as interchangeable when the customer selected attributes differ.

46.2 The allocation system shall prevent duplicate commitments and identify holds, prior use and condition status. A demonstration or previously damaged vehicle shall not be represented as an untouched new allocation without the required accurate disclosure and agreement. Vehicle history shall remain traceable across locations.

46.3 Before logistics release, reconcile the physical identity with system records and documents. Resolve transcription errors, label mismatches and unexpected configuration differences. A transport provider shall receive the correct destination and handling requirements without unnecessary customer data.

46.4 Changes after allocation shall create a controlled reassignment with customer communication where material. Update finance, registration, inspection and digital provisioning records consistently. The original identity shall remain in the audit trail so that an error cannot be hidden by overwriting the order.

47 Physical predelivery inspection

47.1 The predelivery inspection shall follow an approved vehicle specific checklist and competent task instructions. Cover condition, required assembly, tyres, fluids, safety equipment, accessories and functional checks appropriate to the vehicle. Define measured acceptance criteria where needed and record actual results for critical items.

47.2 Confirm open safety actions, delivery holds and required campaigns against the current vehicle identity. A completed cleaning or registration step shall not override an unresolved stop delivery condition. Required remedial work shall be performed and verified before the vehicle is released.

47.3 Inspect for transport damage, storage effects and installation defects. Findings shall be classified by technical significance and customer impact, with a clear repair or disclosure route. A defect shall not be concealed through cosmetic preparation or omitted because the customer is unlikely to notice it immediately.

47.4 The inspection record shall identify inspector, date, instruction revision, results and closure evidence. If the vehicle is stored, transported or modified after inspection, define the recheck required before handover. An earlier pass shall not establish readiness after a material intervening event.

48 Transport custody and arrival checks

48.1 Vehicle logistics shall preserve identity, condition, keys and handling restrictions through each custody change. The transport plan shall identify approved carriers, loading methods, destinations and incident contacts. Special vehicle conditions shall be communicated to competent providers before acceptance.

48.2 At dispatch and receipt, record visible condition and material exceptions using a consistent method. Photographs shall be linked to the correct vehicle and time. Unclear images or unsigned handovers shall not be treated as conclusive proof that damage occurred at a particular stage.

48.3 Arrival checks shall reconcile the vehicle, accessories, keys and documents with the shipment and order. New warnings, damage, missing items or signs of unsuitable handling shall trigger a hold and technical assessment. The dealer shall not proceed to customer handover simply because transport has been paid.

48.4 Logistics claims shall follow the warranty and damage management process while customer fulfilment remains actively managed. Separate responsibility disputes from the decision to repair, replace or delay the vehicle. The customer shall receive accurate information about a material change affecting the agreed delivery.

49 Damage defects and customer disclosure

49.1 Any damage or defect found before delivery shall be recorded with vehicle identity, evidence, technical assessment and proposed disposition. Distinguish safety significance, functional impact and cosmetic condition. Staff shall not decide that a defect is immaterial solely because it can be hidden during presentation.

49.2 Repair shall follow an approved method with appropriate competence and verification. Assess whether the event affects contractual description, value, warranty or required disclosure in the market. The responsible customer and technical functions shall determine the communication and options using actual facts.

49.3 Customer agreement, where relevant, shall be informed and specific. Explain the condition, completed or proposed repair and any remaining consequence. A general delivery acceptance form shall not substitute for disclosure of known material damage or remove mandatory rights.

49.4 Unresolved defects shall remain on the release record with an owner and decision. Essential safety or conformity requirements shall block handover. A permissible noncritical outstanding item shall have a documented arrangement without being relabelled as completed, and shall be tracked to verified closure.

50 Software and digital predelivery readiness

50.1 The vehicle shall have the approved software baseline, configuration and required completed campaigns for its delivery scope. Confirm package identities and installation evidence through the software quality process. A download record alone shall not prove installation, correct configuration or successful functional verification.

50.2 Digital readiness shall include promised features, account provisioning, keys, subscriptions, connectivity and relevant customer services. Check actual operation through an authorised method without exposing credentials. Distinguish a backend order entry from a working entitlement in the intended vehicle and customer context.

50.3 Essential functions and required release checks shall be completed before handover. A salesperson shall not ask the customer to install an unverified essential update later to meet a delivery target. Where a noncritical service can legitimately be deferred, explain its effect and record a specific completion plan.

50.4 The digital inspection record shall link vehicle identity, software state, entitlement status, verifier and outstanding items. Changes after inspection shall trigger the relevant recheck. A physical inspection pass shall not close a failed digital release gate.

51 Account and digital key transfer

51.1 Transfer of digital access shall establish the intended customer or fleet relationship through verified authority. Distinguish ownership, primary user, additional driver and service roles. The delivery team shall not grant permanent access to a temporary representative without the appropriate instruction.

51.2 Revoke previous demonstration, dealer, transport and temporary user access as required by the product process. Verify the intended keys and permissions in the actual vehicle and service platform. Deleting a visible profile shall not be assumed to remove every remote access token or shared key.

51.3 The customer shall perform secret authentication steps privately through the approved channel. Staff shall not request passwords, keep recovery codes or send digital keys through an unapproved messaging route. Provide assistance that preserves the customer's control of their account.

51.4 Test the agreed access method and explain additional user management, lost device response and transfer considerations. If the essential access method fails, retain the relevant delivery hold and arrange a verified remedy. A customer signature shall not convert an unusable required key into a completed handover.

52 Charging and ownership orientation

52.1 For electrified vehicles, orientation shall explain the charging equipment actually supplied, compatible use, routine checks and the approved response to warnings. Demonstrate connection and disconnection only under safe conditions using suitable equipment. Avoid improvised adapters or unsupported promises about compatibility.

52.2 Explain expected variation in range and charging, the meaning of relevant displays and where the customer can find current vehicle instructions. A displayed state of charge shall not be presented as a complete assessment of battery health or a guarantee of remaining usable capacity.

52.3 Discuss service intervals, roadside assistance, warranty contact and the route for safety concerns in a way suited to the customer. Identify which app or connected service is optional and which functions require an account. Do not overwhelm the handover with unrelated promotional enrolments.

52.4 Record the topics demonstrated, questions and any follow up training requested. Offer a durable quick start summary consistent with the approved vehicle information. Orientation shall support safe use and understanding; it shall not be used to shift responsibility for an unresolved delivery defect to the customer.

53 Vehicle delivery and fulfilment procedure

Use one controlled delivery passport to reconcile commercial, physical and digital readiness before possession is transferred.

Step and owner	Required action and retained evidence
1 Order owner	Confirm the agreed order, vehicle identity, recipient authority, payment or finance conditions and required documents.
2 Delivery quality	Verify physical inspection, resolved safety holds, accessories, keys, condition and any required recheck after transport or storage.
3 Digital specialist	Confirm approved software, account relationship, access, entitlements and the status of promised connected services.
4 Handover host	Show the vehicle, explain material features and any legitimately agreed outstanding item, and provide a clear opportunity for customer questions.
5 Authorised releaser	Check all mandatory gates and record release or hold. Resolve essential failures before transfer; do not rely on acknowledgement to waive them.
6 Customer coordinator	Provide durable records, record actual handover, activate the follow up plan and transfer service ownership through the agreed channel.

Delivery completion shall reflect actual transfer and required evidence. Registration, invoicing or a scheduled appointment alone shall not populate the completed delivery status.

54 Home delivery and remote handover

54.1 Home or remote delivery shall apply the same release gates as a dealer handover, with additional planning for location, identity, connectivity and customer support. Confirm safe access, a suitable inspection area and the intended recipient before dispatch. The customer shall understand the delivery window and available assistance.

54.2 The transport and handover roles shall be clear. A driver authorised only to transport the vehicle shall not be expected to resolve software, contract or technical defects without support. Provide an escalation route that can pause the handover and arrange a suitable alternative.

54.3 At the destination, verify identity, condition after transport, keys and essential digital access. Allow the customer a practical opportunity to inspect and ask questions. Poor weather, darkness or failed connectivity shall not force acceptance of an inadequately verified vehicle.

54.4 If the handover cannot be completed, record vehicle custody, restrictions, payment implications and the next plan. Protect the vehicle and customer property while responsibility is clarified. A delivery photograph outside the address shall not be treated as proof that the authorised recipient accepted a fully ready vehicle.

55 Failed handover and outstanding items

55.1 A handover shall be held when an essential identity, payment, physical safety, contractual or digital access condition is unresolved. The release matrix shall identify mandatory gates and authorised dispositions. Staff shall not bypass a hold by recording the vehicle as delivered and promising to correct the record later.

55.2 Classify the issue accurately and assign a technical or commercial owner. Explain the effect, available options and next commitment to the customer. Avoid minimising an essential defect as a minor inconvenience simply because the vehicle is physically present and the appointment is underway.

55.3 A noncritical outstanding item may be deferred only where technically appropriate, consistent with applicable rights and specifically agreed. Record the item, effect, remedy, timing and responsible contact. It shall remain open in the fulfilment system and shall not disappear into an untracked salesperson note.

55.4 Closure shall require the promised remedy and verification. Management shall review failed handovers for planning and integration causes, including late software provisioning or missed transport checks. Deliveries completed through inappropriate overrides shall be investigated even if the customer did not immediately complain.

56 Early ownership follow up

56.1 The follow up plan shall confirm that the customer can use the vehicle, keys, account and promised services, and knows how to obtain support. Timing shall reflect the product and agreed customer preference. Necessary service contact shall remain distinguishable from optional promotional messages.

56.2 Ask about unresolved delivery items, warning messages, charging or account difficulties and the clarity of the handover. Record the customer words and route technical concerns to competent personnel. A salesperson shall not provide an unsupported safety reassurance to preserve satisfaction scores.

56.3 Problems shall receive an owner, case identifier and next commitment. Link them to the delivery passport and relevant warranty or mobile service record. The customer shall not be bounced between dealer, app provider and manufacturer without an accountable coordinating contact.

56.4 Quality shall analyse early ownership patterns by vehicle, channel and delivery process. Correct repeated gaps in configuration explanation, access transfer or inspection. A positive survey response shall not close an outstanding repair, refund or promised accessory that has not actually been delivered.

57 Complaints returns and impartial review

57.1 Customers shall have an accessible route to complain about product information, selling conduct, payments, test drives or fulfilment. Accept concerns through reasonable channels and record the issue without requiring the customer to use technical terminology or prove the final cause at first contact.

57.2 The case owner shall acknowledge the concern, preserve relevant quote and contract versions, communications and delivery evidence, and identify immediate containment. Safety or suspected fraud issues shall escalate through their specialist routes while the complaint review continues.

57.3 Decisions shall distinguish technical facts, contractual obligations, customer rights and discretionary remedies. Provide a clear explanation and review route. Staff implicated in the complaint shall not be the sole independent reviewer, and a remedy shall not require removal of an honest review or silence about a safety concern.

57.4 Returns shall coordinate vehicle condition, custody, account access, finance, payments and personal data through a controlled plan. Administrative closure shall follow actual completion of the agreed remedy. Trends shall inform product data, training and channel controls rather than treating every complaint as an isolated customer preference.

58 Customer experience measures

58.1 Measures shall define population, event, observation period and exclusions. Track configuration accuracy, quote to invoice differences, order changes, delivery reliability, first handover completion, digital activation, complaints and resolution effectiveness. Conversion alone shall not describe customer journey quality.

58.2 On time delivery shall compare actual completion with the relevant committed date for the defined population. Retain changes to promises and show how they affect the measure. Repeatedly moving the committed date shall not erase an earlier missed commitment.

58.3 Surveys and reviews shall be voluntary and presented without coaching, selective suppression or rewards conditional on a favourable score. Staff shall not complete a survey for the customer. Low response rates and channel differences shall be identified when interpreting results.

58.4 Management shall compare commercial performance with quality and customer rights indicators. Investigate unusually high completion rates accompanied by refunds, complaints or postdelivery corrections. Corrective action shall target the underlying process and verify actual customer outcomes rather than changing the metric definition to improve the reported result.

59 Audits exercises and management review

59.1 Audits shall trace representative journeys from advertisement and configuration to accepted terms, payment, test drive and final vehicle state. Include cancellations, finance failures, refunds, delayed orders and failed handovers. Compare live screens and staff explanations with the controlled records.

59.2 Practical exercises shall test wrong configuration, hidden fee detection, changed payment instructions, a test vehicle safety hold and failed digital key activation. Observe whether staff identify the problem, stop the affected action and maintain customer communication. A completed checklist alone shall not prove effective control.

59.3 Findings shall identify affected customers and transactions, immediate containment, root cause and corrective action. Recheck the live journey after correction, including partner systems and alternative channels. Training shall be targeted to demonstrated gaps rather than used as the default response to every system defect.

59.4 Management review shall assess product data quality, dealer conduct, partner reliability, fulfilment readiness and complaint outcomes. Record resource and scope decisions with owners and due dates. Expansion into new channels or territories shall depend on demonstrated control of the existing journey.

60 Document interfaces and revision control

60.1 This manual operates within IAF-QM-001 and the IAF Documents and Records Guide. IAF-MAN-WCR-001 governs warranty, damage and recall case handling; IAF-MAN-MRD-001 governs remote diagnostics and mobile service; IAF-MAN-ASM-001 governs authorised workshop service. Customer handoffs shall preserve linked case identities.

60.2 IAF-MAN-SDV-001 governs approved software and configuration release. IAF-MAN-SCL-001 supports vehicle logistics, IAF-MAN-ASI-001 supports parts fulfilment, and IAF-MAN-IRB-001 supports incident and battery escalation. Sales processes shall not override the technical controls in those manuals.

60.3 The IAF Data Protection and Privacy Policy, Conflict of Interest Policy, Appeals and Complaints Policy and Mark Usage Policy govern their respective institutional interfaces. Membership or Corporate Recognised status shall not be represented as a guarantee of an individual vehicle, finance product or customer transaction.

60.4 Revisions shall identify affected screens, scripts, contracts, dealer instructions, training and records. The document owner shall coordinate implementation and retain change evidence. A new release shall not retroactively alter accepted customer terms or rewrite the facts of a completed journey.

Annex A Market and channel adoption record

Complete before opening a market, dealer arrangement or material online sales capability. Attach actual approvals and test evidence.

Record field	Required entry and evidence
Operating model	Selling entity, market, channels, dealer or agent roles and accountable director.
Obligations	Customer rights, contract formation, payment, finance, privacy and registration requirements reviewed by competent owners.
Product scope	Supported vehicles, options, subscriptions, accessories and excluded offers.
Customer journey	Configuration, quote, order, payment, test drive, delivery and complaint responsibilities.
Partner readiness	Dealer, finance, logistics, digital service and payment agreements and controls.
Validation	Live journey, document, accessibility, integration and failed transaction test evidence.
Open conditions	Issue, affected activity, owner, due date and launch hold.
Release	Actual approval, effective date, scope, evidence location and review triggers.

A publication date does not establish that a market or channel has passed its operational release. Preserve later scope changes as controlled revisions.

Annex B Product master data record

Create a controlled entry for each material vehicle attribute or offer component. The same released meaning shall reach all customer channels.

Record field	Required entry and evidence
Identity	Model, variant, market, model year, attribute and data owner.
Approved value	Value, unit, permitted wording and underlying approved product evidence.
Applicability	Build conditions, options, software dependencies and exclusions.
Commercial meaning	Standard, optional, accessory, trial, subscription or future planned item.
Effective period	Release date, end date and treatment of saved quotes or accepted orders.
Channel mapping	Website, configurator, dealer, order system and printed material fields.
Quality checks	Completeness, consistency, translation, visual match and integration results.
Change record	Previous value, reason, approval, affected customers and communication action.

An unknown specification shall not be filled with a value from a similar model without technical approval and a clear basis.

Annex C Configurator validation worksheet

Use for a release or regression test. Expand rows for each scenario and preserve screenshots where they support the result.

Record field	Required entry and evidence
Test identity	Release version, market, device, language, tester and test date.
Scenario	Selected vehicle and options, starting state and customer objective.
Expected rules	Allowed combination, blocked combination, dependency or availability condition.
Expected commercial result	Price components, total, conditional items and explanation shown.
Actual presentation	Configuration, images, labels, errors and accessibility observations.
Downstream record	Saved quote, order transfer, identifiers and option reconciliation.
Result	Pass or fail, defect severity, customer effect and evidence location.
Release decision	Correction, retest, approval, containment and monitoring plan.

A visual pass shall not close an incorrect price or downstream configuration. Test the complete transaction meaning, not only the appearance of the page.

Annex D Transparent quote and price schedule

Use a durable customer facing summary supported by controlled internal evidence. State currency and the treatment of taxes and conditions.

Record field	Required entry and evidence
Quote identity	Quote number, version, issue and validity, selling entity and customer reference.
Vehicle	Exact configuration, included equipment, selected options and relevant delivery assumptions.
Price components	Base vehicle, options, accessories, mandatory charges and applicable tax treatment.
Optional items	Separately chosen products, price, provider and removal or cancellation conditions.
Conditional amounts	Discount eligibility, estimated trade in, pending finance or other unresolved assumption.
Total and deposit	Total payable, deposit credit and remaining balance with calculation visible.
Timing and rights	Estimated or committed timing and the applicable contract and cancellation information.
Acceptance trail	Customer selected version, changes, instruction and linked order identity.

Known mandatory charges shall not be omitted from the total. Estimated items shall be identified without presenting an artificially low unconditional price.

Annex E Customer contact and preference record

Use to coordinate service across channels while separating necessary transaction contact from optional marketing.

Record field	Required entry and evidence
Identity and request	Verified customer reference, enquiry purpose and vehicle or order where relevant.
Contact preference	Preferred channel, practical timing, language and accessibility assistance.
Notice	Privacy information version and purpose explained at collection.
Optional choices	Actual marketing or tracking choices, date, channel and withdrawal updates.
Journey owner	Responsible dealer or team, receiving contact and handoff acknowledgement.
Commitments	Promised response, current issue, next action and due date.
Data scope	Information needed for the task and any authorised sharing with partners.
Corrections	Changed preference, duplicate resolution, request handling and affected systems updated.

A telephone number supplied for an order update shall not automatically authorise unrelated promotional contact or unrestricted partner sharing.

Annex F Order and contract reconciliation

Complete before the order proceeds to allocation or fulfilment. Resolve differences rather than assuming the latest system entry is correct.

Record field	Required entry and evidence
Parties	Selling entity, customer, representative authority and related service providers.
Configuration	Accepted quote version, vehicle specification, accessories and digital entitlements.
Commercial terms	Price, conditions, deposit, balance, finance dependencies and delivery assumptions.
Contract evidence	Accepted text version, formation event, signer verification and durable copy supplied.
System comparison	Quote, dealer, ordering, payment and finance records reconciled.
Exceptions	Mismatch, effect, required approval and customer communication.
Changes	New version, customer instruction and update of all affected records.
Release	Order owner, completed checks, unresolved hold or authorised next state.

An acknowledgement, reservation and accepted contract shall use accurate distinct statuses. The customer shall be told when a decision remains pending.

Annex G Payment and refund control record

Use for each material receipt, correction or refund. Keep customer payment secrets outside general sales records.

Record field	Required entry and evidence
Transaction	Order, payer, purpose, amount, currency and approved payment channel.
Verification	Actual receipt or settlement evidence, reference and reconciliation owner.
Exception	Partial, duplicate, excess, third party or disputed payment and review action.
Refund basis	Approved reason, applicable assessment, amount and justified deductions if any.
Recipient control	Original route or independently approved alternative with verification evidence.
Authorisation	Operator, independent approver and duplicate payment check.
Execution	Date, transaction reference, actual status and failed payment follow up.
Closure	Ledger and order reconciled, customer notified and unresolved balance identified.

A screenshot shall not establish settled funds. A refund approval shall remain distinguishable from execution and confirmed settlement.

Annex H Dealer and showroom readiness check

Use before customer opening and after a change affecting product or transaction accuracy.

Record field	Required entry and evidence
Displayed information	Current prices, specifications, promotions and clear optional equipment labels.
Vehicles	Condition, safety holds, keys, charging arrangements and access suitability.
Customer area	Safe routes, accessible assistance, privacy for sensitive discussions and clean presentation.
Digital devices	Managed sessions, working interfaces, customer data removal and approved content.
Staff readiness	Current product knowledge, authority limits, appointments and escalation contacts.
Commercial controls	Approved quotes, payment instructions, finance information and optional product choices.
Open defects	Issue, owner, restricted activity and customer communication if affected.
Release	Duty manager, time, corrective evidence and recheck requirements.

A showroom may open with a restricted item only when the restriction is effective and does not mislead customers about availability or readiness.

Annex I Test drive risk and route plan

Prepare for the vehicle type and local conditions. Review when the route, weather, supervision model or customer needs change.

Record field	Required entry and evidence
Purpose	Customer evaluation objectives and features intended for demonstration.
Eligibility	Driver authority, licence checks, insurance arrangement and agreed passengers.
Vehicle	Identity, readiness status, specification and fuel or charge suitability.
Route	Road conditions, safe stopping opportunities, duration and relevant restrictions.
Briefing	Essential controls, driver responsibility, distraction prevention and assistance limits.
Contingency	Warning, breakdown, discomfort, collision and emergency contact arrangements.
Special conditions	Accessibility, unfamiliar operation, weather or other factors requiring adaptation.
Approval	Responsible host, permitted plan and conditions that require cancellation or change.

The plan shall not include deliberate hazards or unsafe demonstrations of automatic intervention. The driver may stop the test when continuation is inappropriate.

Annex J Test drive traveller and return record

Use for each actual drive, linking the predrive condition with the return and any customer observations.

Record field	Required entry and evidence
Assignment	Vehicle, driver, host, agreed passengers and departure time.
Predrive check	Readiness, condition, keys, charge or fuel and open actions checked.
Briefing	Controls, route, responsibilities and incident procedure explained and understood.
Drive record	Actual route or relevant deviation, observations and safely recorded findings.
Incident	Warning, damage, near miss or discomfort, immediate response and case link.
Return	Time, condition comparison, keys and customer comments.
Disposition	Available after preparation or held for technical review, with responsible owner.
Data closure	Personal pairings and content removed through the verified reset process.

New damage shall be assessed fairly using evidence. An automated image flag or a preprinted liability statement shall not replace review of the actual circumstances.

Annex K Predelivery damage and defect record

Use when a material condition is found before handover. Preserve the original finding and any subsequent repair evidence.

Record field	Required entry and evidence
Identity	Vehicle, order, location, discovery time and reporting person.
Condition	Observed damage or defect, photographs where useful and known history.
Technical assessment	Safety, function, appearance and required specialist evaluation.
Disposition	Repair, replacement, further investigation or other authorised outcome.
Customer implications	Effect on agreed description, value, timing and required disclosure or options.
Repair evidence	Approved method, competent performer, parts and verification results.
Customer record	Specific explanation, response and any permissible agreed arrangement.
Release	Competent decision, remaining hold or verified closure and updated delivery plan.

A general acceptance form shall not conceal known material damage. Responsibility disputes shall not delay necessary technical containment or accurate customer information.

Annex L Physical predelivery inspection record

Use the vehicle specific checklist as the detailed instruction. This record provides the release structure and evidence links.

Record field	Required entry and evidence
Identification	Vehicle identity, configuration, mileage or use status and inspection revision.
Safety status	Open campaigns, stop delivery conditions and required remedies checked.
Condition	Body, interior, glazing, tyres and transport or storage effects assessed.
Technical checks	Required fluids, assembly, electrical and functional checks with actual results.
Ordered items	Accessories, equipment, charging items, keys and documents reconciled.
Defects	Finding, severity, repair instruction, owner and verification evidence.
Intervening events	Transport, storage, modification or other event requiring a recheck.
Physical release	Inspector, date, competent approval and unresolved conditions.

Physical release shall not automatically release digital entitlements or commercial conditions. Each mandatory dimension shall be verified before handover.

Annex M Digital predelivery inspection record

Use to verify the actual delivered digital state, not merely the presence of an order in a backend system.

Record field	Required entry and evidence
Vehicle baseline	Vehicle identity, approved software and configuration, required campaigns and evidence.
Customer relationship	Verified intended owner or fleet role and authorised additional users.
Keys and access	Physical and digital keys, actual function and removal of temporary access.
Entitlements	Included features, trials, subscriptions, start dates and supported territory.
Connectivity	Required service operation and any known outage or unavailable dependency.
Privacy state	Previous profiles, pairings and dealer or demonstration data removed as required.
Failures	Issue, essential or noncritical classification, owner and remedy plan.
Digital release	Verifier, results, customer explanation and hold or completion decision.

Do not record a required key or entitlement as complete when activation is merely queued. Essential failures shall block the relevant release.

Annex N Delivery passport and customer handover

Use one passport to reconcile the final order, vehicle and customer experience. Link detailed inspection records rather than duplicating them inaccurately.

Record field	Required entry and evidence
Commercial gate	Agreed order, recipient authority, payment or finance conditions and documents verified.
Vehicle gate	Correct identity, physical release, condition after transport and ordered equipment.
Digital gate	Software, account, keys and promised entitlements verified.
Orientation	Essential controls, assistance limits, charging where relevant and support routes explained.
Outstanding items	Specific permissible item, effect, agreement, owner and completion commitment.
Customer review	Questions, observed concerns and opportunity to inspect the supplied vehicle.
Release and transfer	Authorised decision, actual date and time, parties and custody change.
Follow up	Durable records provided, service contact and unresolved action tracking.

Customer acknowledgement records receipt and communication. It shall not waive mandatory rights or turn an unresolved essential condition into a passed quality gate.

Annex O Worked price and delivery measures

Illustrative examples only. Currency units are hypothetical and contain no assumed universal tax rate or market charging rule.

Record field	Required entry and evidence
Vehicle price	Base price 40,000 plus selected options 2,000 gives 42,000 currency units.
Other components	Approved mandatory charge 300 plus applicable calculated tax 4,230 gives a total of 46,530 in this example.
Deposit credit	A received deposit of 1,000 leaves a balance of 45,530. The deposit is not added a second time as a fee.
Optional product	An unselected optional service costing 500 is excluded. Adding it requires a new clear total and customer choice.
Delivery population	100 orders have a committed delivery date in the reporting period.
Actual result	88 complete on time, 7 complete late and 5 remain undelivered. On time performance is 88 divided by 100, or 88 percent.
Incorrect denominator	Using only 95 delivered orders would produce about 92.63 percent and omit the 5 overdue undelivered commitments.
Revision control	Retain original promises and disclose the effect of agreed changes. Do not move dates silently to improve performance.

The tax amount is an illustrative input, not a prescribed calculation. Operational reports shall state definitions, exclusions and the actual market treatment.

Annex P Case exercise configuration changes after order

Scenario: a supplier change removes a feature shown in the accepted configuration. The website has been updated, but an existing customer order still includes the original feature.

Record field	Required entry and evidence
Initial trap	Assuming the website correction automatically changes the accepted customer agreement.
Evidence	Retrieve accepted quote, contract, configuration version and the actual allocated vehicle capability.
Impact review	Assess technical, commercial, finance, timing and customer rights consequences with competent owners.
Customer explanation	State the exact difference and available supported options without describing the missing feature as an equivalent substitute.
Decision	Record the customer instruction and applicable contractual outcome before changing the order.
System correction	Update allocation, pricing, finance, preparation and entitlement records consistently.
Release gate	Hold fulfilment until the agreed configuration and actual vehicle reconcile.
Effectiveness	Review other affected orders and test whether future product changes trigger the same controlled process.

The exercise passes when the team preserves the original commitment and resolves the change transparently, not when it edits the record to match available stock.

Annex Q Case exercise essential digital access failure

Scenario: the vehicle passes physical inspection, but the customer required access method cannot be activated during a home delivery.

Record field	Required entry and evidence
Initial trap	Recording delivery as complete because the vehicle has arrived and asking the customer to solve access later.
Verification	Confirm the exact failure, approved access alternatives, customer authority and platform status.
Classification	Determine whether the failed function is essential to safe and intended use or a genuinely noncritical service.
Hold decision	Retain the required release hold when no verified essential access method is available.
Customer support	Explain options, vehicle custody and the next committed action through an accountable contact.
Security control	Do not share dealer credentials, keep customer passwords or issue unapproved temporary keys.
Closure evidence	Verify intended access, revoke temporary permissions and complete the affected handover checks.
Process review	Identify why provisioning or connectivity readiness was not resolved before dispatch.

A customer signature shall not replace working essential access. Noncritical deferral, where permissible, shall be specific, informed and tracked to completion.

Annex R Retail quality management review

Use to turn journey evidence into decisions about systems, people and partners. Include customers who cancelled or did not complete a purchase.

Record field	Required entry and evidence
Review scope	Period, markets, dealers, channels, products and transaction populations.
Accuracy	Configuration defects, price discrepancies, misleading claims and affected customer actions.
Conduct	Complaints, optional product choices, finance referrals, conflicts and incentive effects.
Fulfilment	Delivery reliability, failed handovers, physical defects and digital activation performance.
Customer access	Accessibility barriers, contact continuity, privacy requests and support outcomes.
Partner capability	Dealer, logistics, payment and digital service performance with significant exceptions.
Action plan	Root cause, change, owner, due date and measurable effectiveness evidence.
Decisions	Resources, restrictions, expansion conditions and verified closure of previous actions.

A favourable sales result shall not close unresolved quality findings. Record the evidence supporting each decision and maintain visibility of overdue corrective actions.