SILVERLINE TRAILERS

Policies and Procedures

Table of Contents

Corporate Office Contacts/Roles

Customer Service/Warranty……………………...

Titles…………………………………………… Renee Voegtlin - jvoegtlin@silverlinetrailer.com

Inventory Ordering/Logistics……………………. Chris Sterling - csterling@silverlinetrailer.com

Finance Manager………………………………… Andrew Moss - amoss@silverlinetrailer.com

Lightspeed………………………………………… Amy Smith - asmith@silverlinetrailer.com

Inventory Management………………………… Julie Fullerton - jfullerton@silverlinetrailer.com

Accounts Receivable………………………… Charlotte Riddle - criddle@silverlinetrailer.com

Accounting……………………………………

Licensing/Legal………………………………… Jason Mattison Sr. - jason@silverlinetrailer.com

IT Operations……………………………………Chadrick Parson - chad@silverlinetrailer.com

Human Resources……………………………. Amy Wilmath - awilmath@silverlinetrailer.com

Finalization……………………………………Jenna Clark - jclark@silverlinetrailer.com

Controller……………………………………..Natalie Crocket – ncrockett@silverlinetrailer.com

Reimbursements and Expenses

Purpose

This policy outlines the guidelines for submitting and approving employee reimbursements to ensure accuracy, accountability, and timely processing.

Eligible Expenses

Reimbursements are limited to **approved, business-related expenses**, including but not limited to:

- Travel required for company business
- Meals during approved business travel
- Lodging for approved overnight travel
- Office or operational supplies purchased for business use
  All expenses must be reasonable and necessary.

Submission Requirements

To be eligible for reimbursement:

- **Receipts are required for all expenses** (no exceptions)
- Receipts must clearly show:
  - Date of purchase
  - Vendor name
  - Amount paid
  - Method of payment
- Reimbursement requests must be submitted **within the required timeframe** set by accounting
- Missing or incomplete documentation may result in **delayed or denied reimbursement**

Deposit & Reporting Compliance

- **Monday and Thursday deposits must be completed and reported**
- If there is **no deposit for a scheduled day**, an email stating **“$0 deposit”** must be sent to accounting
- **Reimbursement requests will be withheld** if required deposits or reports are missing

Non-Reimbursable Expenses

The following will **not** be reimbursed:

- Personal expenses
- Expenses without receipts
- Expenses not pre-approved when required
- Charges that violate company policies

Approval Process

- All reimbursements are subject to management and accounting review
- Submission does **not guarantee approval**
- Reimbursements are processed only after all requirements are met

Policy Enforcement

Failure to follow this policy may result in:

- Delayed reimbursement
- Denied reimbursement
- Additional review or corrective action if issues are ongoing

Weekly Silverline Expense Reimbursement Form

Employee Name/Lot Manager: ______________________ Date of Form Submitted:

Department/Location: ______________________ ______________________

Receipt Submissions						
Date of Expense	Payee		Description	Reimb Type, ACH/Check	Amount	Approval Initials
				Total Amount:		

Mileage Submissions							
Date of Expense	Departure Location	Arrival Location	Description	Total Miles	Rate**	Amount	Approval Initials
			Total Miles:		Total Amount:		

Requestor Signature: ______________ Date: ______________ Subtotal Expenses: ________

Requestor Phone: ______________ Less Unapproved ________

Denial Reasons: **Total Reimbursement:** ________

____

* If any travel expenses are submitted, there must be preapproval provided.

** The standard mileage rate for your personal vehicles is $0.67 for automobiles and $1.67 for airplanes

Please refer to the Lot Manager Policies and Procedures Handbook or the Information for Employees for the instructions provided as to how to complete this form. If those procedures are not followed, this form could be denied.

Internal Use Only	
Form #	
Date Processed:	
Processed By:	
Travel Approval:	
More than $1,000 individual item approval	
Updated Annual Budget	

Bank: Commerce Bank 160 South Broadview
Cape Girardeau, MO 63703
Phone: 573-335-3502

Routing Number: 101000019

Account Number: 204445114

Type of Account: Checking

Beneficiary Name: BCMS Investments, LLC dba
Silverline Trailers
907 S Hickory St
Dexter, MO 63841

Message to Beneficiary:

Facility Standards and Maintenance

Purpose

To maintain a safe, professional, and customer-ready environment across all dealership locations. These standards apply to all employees and management responsible for facility appearance, safety, and upkeep.

General Facility Standards

- Facilities must remain **clean, organized, and professional** at all times
- All areas should be **free of hazards, clutter, and debris**
- Grounds and buildings must present a **positive first impression** to customers
- All company property must be used and maintained responsibly

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Exterior & Lot Standards

- Trailer inventory must be:
    - Properly aligned and spaced
    - Free of visible damage, excessive dirt, or debris
    - Secured according to safety guidelines
- Parking lots must be:
    - Free of trash, loose materials, and hazards
    - Clearly marked and well-lit
- Grass, gravel, and landscaped areas must be:
    - Maintained regularly
    - Free of weeds and standing water
- Snow, ice, and mud must be addressed promptly when applicable

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Interior Standards (Offices, Showrooms, Break Areas)

- Customer-facing areas must be:
    - Clean, organized, and presentable during business hours
    - Free of personal clutter
- Floors, windows, counters, and restrooms must be cleaned regularly
- Furniture, fixtures, and equipment must be:
    - In good working condition
    - Free from damage or excessive wear

- Food and personal items must be stored appropriately

Service & Shop Areas (If Applicable)

- Tools and equipment must be:
  - Stored properly when not in use
  - Maintained according to manufacturer guidelines
- Work areas must be:
  - Kept clean and organized
  - Free of oil spills, loose cords, and trip hazards
- Waste materials must be disposed of properly and promptly
- Fire extinguishers and safety equipment must remain accessible

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Maintenance & Repairs

- Routine maintenance must be performed on:
  - Buildings, doors, windows, and locks
  - Lighting (interior and exterior)
  - Electrical, plumbing, and HVAC systems
- Any safety-related issue must be **reported immediately**
- Non-urgent repairs should be reported promptly to management
- Unauthorized repairs or modifications are not permitted

Safety & Compliance

- All locations must comply with:
  - OSHA and applicable safety regulations
  - Local, state, and federal building codes
- Emergency exits must:
  - Be clearly marked
  - Remain unobstructed at all times
- Safety signage must be visible and maintained
- First aid kits and fire extinguishers must be:
  - Stocked and accessible

Responsibilities

- Employees are responsible for maintaining cleanliness in their work areas
- Management is responsible for:
  - Ensuring facility standards are met
  - Scheduling routine maintenance
  - Addressing reported issues promptly
- Failure to follow facility standards may result in corrective action

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Inspections & Enforcement

- Facilities may be subject to:
  - Routine inspections
  - Unannounced walk-throughs
- Repeated issues or neglect may result in disciplinary action
- Standards apply during all business hours and company events

Accepted Forms of Payment Policy

Cash Payments

- Any cash payment of **$1,000 or more** must be **reported immediately to the Lot Manager**
- Locations are required to have a safe in store with **all cash over $1,000 being stored inside.**
- **Large denomination bills must be checked for authenticity.**

Card Payments

- Card payments are processed **only through Lightspeed**

Click to Pay Payments

- **Maximum Click to Pay payment: $750**
- Customer must provide:
  - A copy or photo of a **valid driver's license or ID**
  - Cardholder name matching the ID
  - Card authorization form must be signed via Lightspeed
- Payments may not be processed without ID verification

In-Person Card Payments

- Payments over **$750** are permitted **in person only**
- Required steps:
  - Customer must be present
  - Cardholder name must match the buyer
  - Photo ID must match the card
  - Copy of ID must be retained
  - Card authorization form must be signed via Lightspeed
  - **Card terminal must be used** (no manual entry)

Cards without the buyer's name are not permitted under any circumstance

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ACH Payments

- ACH payments are allowed **only with an approved ACH authorization form**
- ACH form must be emailed to **accounting@silverlinetrailer.com**
- Customer **must be present** to initiate ACH
- Customer **may not leave** until accounting verifies bank information
- For **ACH payments in full**:
    - Trailer title must be **held**
    - Title is released only after accounting confirms payment cleared *(typically 7–10 business days)*

Bank Wires

- Bank wires are a preferred payment method, **referring to page 6 for wiring instructions**
- Customer **may not leave** with unit until accounting verifies bank wire

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Cashier's Checks and Money Orders

- Accepted if made payable to **Silverline Trailers**

Policy Enforcement

Failure to follow payment acceptance procedures may result in:

- Delayed processing
- Rejected payments
- Disciplinary action

Cash Drawer Policies and Procedures

Purpose

To ensure proper control, accountability, and security of all cash, checks, and deposits. All employees who handle cash must strictly comply with this policy. Failure to comply may result in disciplinary action.

General Cash Handling Rules

- All cash handlers must follow established cash handling procedures at all times
- Cash must be secured and never left unattended
- Two-person verification is required whenever possible
- Cash handling activities should occur out of public view

Cash Drawer Standards

- All funds must be stored in a **secure, locked cash drawer or register**
- Cash drawers must remain **locked when not actively in use**
- Cash drawers should only be opened **with two people present**
- Cameras should monitor safes and cash registers whenever possible, especially in isolated areas

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Safe Access & Cash Transfers

- Cash removed from the safe must be:
  - Counted by **two people**
  - Documented on a **Cash Count Sheet**
  - Signed by both parties
- Cash Count Sheet must include:
  - Names of employees handling cash
  - Date and time cash is removed and returned
  - Cash breakdown (bills, coins, checks, credit card slips)
  - Two signatures confirming the drawer balance
- Any cash handoff requires the receiving employee to:
  - Count the cash before accepting
  - Retain the signed Cash Count Sheet

Opening Cash Drawer Procedures

- Beginning cash must be **verified and recorded daily**
- Authorized startup cash is **$200**, used for customer change only

Required Breakdown:

- $1 bills – $22
- $5 bills – $40
- $10 bills – $60
- $20 bills – $60
- Pennies – 2 rolls ($1.00)
- Nickels – 1 roll ($2.00)
- Dimes – 1 roll ($5.00)

Closing & Balancing Procedures

Each location must balance its cash drawer **daily**.

Balancing includes:

- Counting all currency, coins, and checks
- Subtracting the $200 startup cash
- Comparing total cash on hand to transaction records
- Totals must match

Balancing Requirements:

- Two people must be present whenever possible
- If unavailable, counting must occur **in camera view**
- Currency, coins, and checks must be removed and counted
- All checks must be:
    - Listed individually
    - Endorsed "For Deposit Only"

Deposit Preparation

- Deposit slips must be completed accurately (do not round amounts)
- Each check must be listed individually with its check number
- Deposit slips require **initials of Manager**
- Copies must be made of:
  - Deposit slip
  - Checks
  - Daily Cash Report

Timing & Storage Deposit

- Deposits must be made **every Monday and Thursday,** if a bank holiday falls on Monday or Thursday, deposit should be made **the following business day**
- If deposit cannot be made, funds must be stored in a **secure vault or safe**
- Cash drawers must be replenished to **$200 startup cash**

Accounting Documentation

After depositing funds:

- Scan and email the following to **accounting@silverlinetrailer.com**:
  - Bank receipt
  - Deposit slip
  - Copies of checks
  - Daily Cash Report
- **Email Subject Format:**
  Location Name - Bank Deposit - Date
  (Example: Dexter, MO Bank Deposit 1.10.26)
- Staple and file all original documents locally for reference

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Reconciling Differences

If a discrepancy exists:

1. Recount all cash, coins, and checks
2. Recalculate receipt totals
3. Verify EFT/ACH deposits

4. Review for transposed numbers
5. Compare all receipts to reports
6. Break down the deposit if needed
7. Do not discard trash until resolved

Cash Over / Short Policy

- A discrepancy between receipts and deposit constitutes an **overage or shortage**
- If unresolved:
  - Complete the deposit for the actual amount
  - Mark "**Overage**" or "**Shortage**" on the deposit slip accordingly

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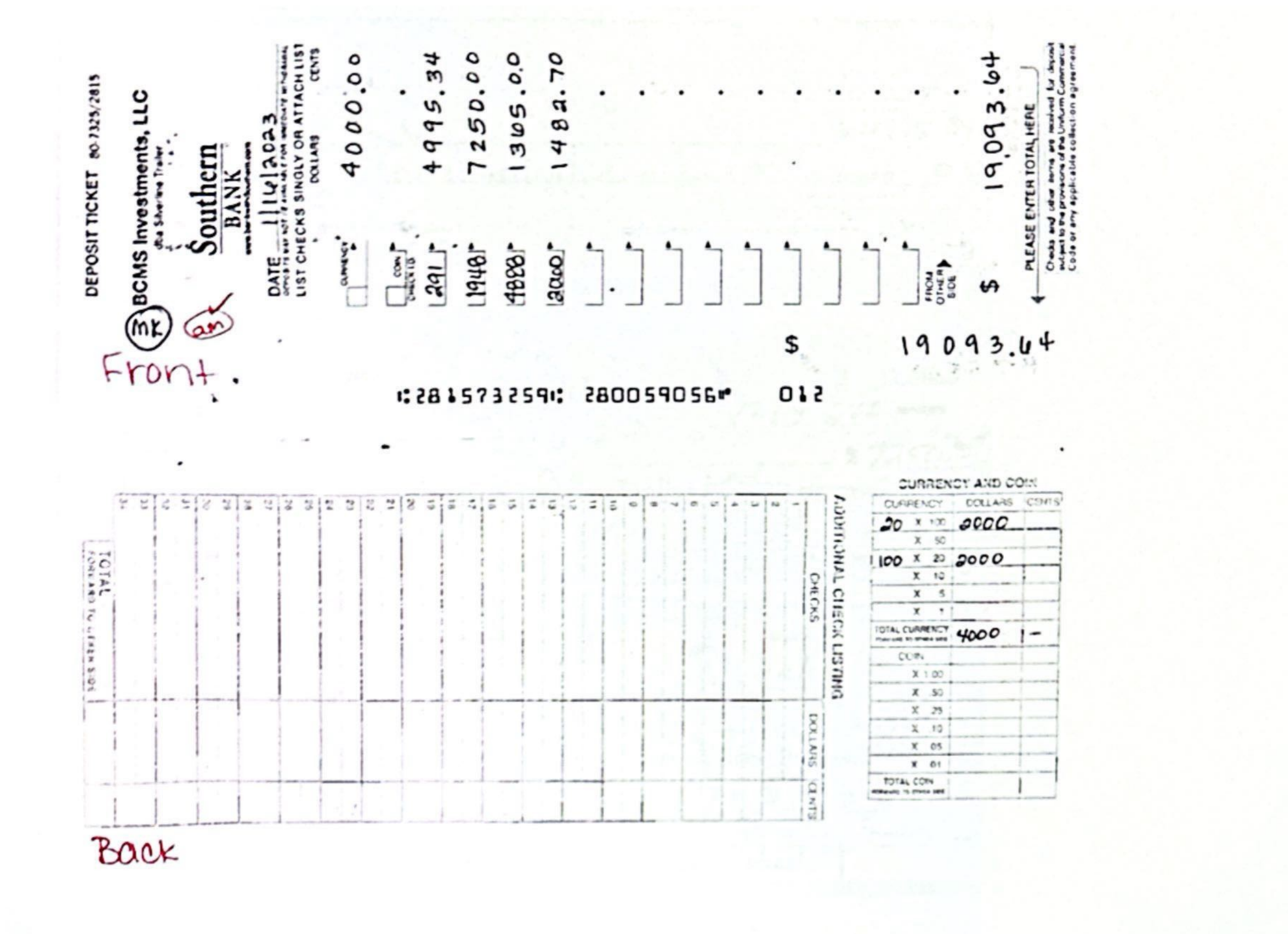
Reporting Losses or Theft

- Any suspected loss or theft must be **reported immediately**
- Managers must escalate losses to Accounting
- **Do NOT:**
  - Attempt to correct or conceal losses
  - Destroy any records
- Secure all original documentation and forward copies to Accounting

Deposit Slip Example – Front and Back



Marketing Allowance Policies and Procedures

Purpose

To establish clear guidelines for marketing spending, Facebook advertising, and credit card usage while ensuring accountability, compliance, and measurable results.

Marketing Allowance

- Silverline Trailers provides a **monthly marketing allowance equal to 1% of the location's average total revenue**
- Allowance applies primarily to **Facebook advertising and approved marketing expenses**
- Marketing performance is evaluated based on:
    - Facebook message response and review time
    - Increase in gross sales
    - Positive customer reviews

Facebook Advertising Policy

- The **Marketing Director** will:
    - Have access to each location's Facebook login
    - Control advertising setup, boosting, and billing
    - Use a location-specific credit card with a **monthly limit based on a 3-month sales average**
- Lot Managers:
    - Will **not** have physical access to the Facebook advertising credit card
    - Must provide Facebook login credentials when requested

Facebook Posting Standards

- All advertisements must be:
    - Clear and accurate
    - Grammatically correct
    - Professional and appropriate

- Ads must follow company branding and content guidelines

Receipt & Documentation Requirements

- All Facebook receipts sent to the location **must be forwarded immediately to the Marketing Director**
- **Email subject format:**
  Facebook – Location – Date Range
  (Example: Facebook – Dexter – March)
- Failure to submit receipts may result in **credit card deactivation**
- All receipts must be submitted **by month-end** for reconciliation

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Credit Card Controls & Restrictions

- Credit cards are **restricted to Facebook advertising only**
- Sharing card information or using it for non-approved purposes will result in:
  - Immediate card cancellation
  - Notification to Accounting

Accounting Review & Approval

- After reconciliation, credit card statements and receipts are:
  - Submitted to Accounting
  - Reviewed and approved based on the location’s allowance

Monitoring & Enforcement

- Credit card activity is reviewed weekly for:
  - Suspicious charges
  - Waste or abuse
  - Unapproved expenses
- Cards may be paused if:
  - Personal expenses are detected
  - Advertising exceeds approved limits

- Documentation is missing or incomplete

Additional Marketing Spend

- Any marketing expense exceeding the approved allowance must receive **pre-approval** from:
  - Accounting and Executive Board
- Only **company-approved advertising and promotional materials** may be used

Receiving Inventory and Shipping / RFP Process

Purpose

When new or used trailers arrive at a Silverline location, the Receiving Inventory and Request for Payment (RFP) process ensures:

- Trailers are inspected for damages and missing parts.
- All documentation matches the delivered trailers.
- Corporate Office is notified whether payment to the transportation company is needed.

Steps for Receiving Trailers

1. **Inspect the Trailer**
    - Perform a detailed walk-around for damages or missing parts.
    - Check wiring, power, studs, axles, and any additional options.
    - Take photographs of trailers that are damaged.
2. **Compare Documentation**
    - Match the trailer and any add-ons to the **Manufacturer Invoice**.
    - Verify all VIN numbers across **BOL**, **Manufacturer Invoice**, **MSO**, and **Transportation Invoice**.
3. **Prepare the Trailer**
    - Down-stack and assemble trailers as soon as possible.
    - Recheck for any issues after assembly.
4. **Handle Issues**
    - Contact **Warranty** or **Inventory Department** if issues are found.
    - Document and photograph all damages.

Required Documentation

1. **Bill of Lading (BOL)**
    - Must be from the manufacturer.
    - Include logo, address, phone, and all VINs for trailers.
    - List all damages or missing parts next to the VIN.
    - Must be signed by the **Silverline receiving agent**.
2. **Transportation Company (Shipping) Invoice**

- Include company name, contact info, Silverline Trailers delivery location, and manufacturer info.
- Include VINs, driver rate, mileage, and total amount to pay.
- Document any damages or missing parts.
- Must be signed by **driver** and **receiving agent**.

3. **Titles and Manufacturer Invoices**
   - Ensure VINs match across all documents.
   - Verify axles and listed options against the trailer.

Email to Corporate Office

When Payment is Required

Subject: `Transportation Company, Invoice Number, Silverline Trailers Location, Date, RFP`
Body:

- To/From: **(East Texas to Dexter, MO)**
- Delivery Date
- Transportation Company Invoice Number
- Transportation Company Name
- VIN Numbers of Trailers on Load

Attachments:

- All scanned documents (BOL, Invoices, MSOs)
- Photos of trailers and any damages

Other Rules / Notes

- All photos of damaged trailers must be included in the email.
- A manager must sign the freight invoice if there is damage.
- After corporate office approval, payment is submitted via **next-day ACH**.
- Once payment is processed, freight is added to inventory.

Down Stacking Policies and Procedures

Purpose

To safely, efficiently, and accurately down stack trailers while minimizing damage, ensuring inventory accuracy, and protecting employees.

Scope

This policy applies to all employees involved in receiving, unloading, moving, and inspecting trailers at the dealership.

Responsibilities

- **Receiving Team:**
  Responsible for inspecting trailers, following stacking/down stacking protocols, documenting discrepancies, and moving trailers safely.
- **Management / Supervisor:**
  Ensures compliance with safety policies, reviews inspection reports, and enforces procedures.
- **Drivers / Forklift Operators:**
  Must operate equipment according to training and company safety standards.

Equipment Required

- Forklifts or other lifting equipment rated for trailer weight
- Trailer dollies or wheel chocks
- Personal Protective Equipment (PPE): gloves, steel-toe boots, high-visibility vests, hard hats

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Down Stacking Procedures

Step 1: Pre-Stack Inspection

- Verify stack height and stability.
- Ensure the path is clear and floor surfaces are even.
- Confirm all trailers in the stack are properly chocked or supported.
- Review the manufacturer invoice or packing list to confirm expected trailer models.

Step 2: Safety Preparation

- Ensure all personnel are wearing PPE.
- Establish a **safety perimeter** around the down stacking area.
- Confirm forklifts and lifting equipment are operational and inspected.
- Communicate with team members using hand signals or radios before moving trailers.

Step 3: Trailer Release

- Start with the **top trailer in the stack**.
- Ensure the trailer is stable before lifting.
- Use **forklifts or hoist carefully** to lift trailer evenly to avoid tipping or damage.
- Move the trailer slowly to the staging area.

Step 4: Post-Move Inspection

- Conduct a **detailed inspection** for:
  - Structural damage (bends, cracks, rust)
  - Missing components (lights, hitches, pins, wheel nuts)
  - Paint or cosmetic damage
- Compare findings to the **manufacturer invoice** and **inventory system**.
- Document any damage or missing parts immediately and report to management.

Step 5: Completing the Process

- Remove any stacking supports or pallets safely.
- Clear the area of tools, straps, or debris.

Safety Guidelines

- Never exceed forklift or hoist weight capacity.
- Never stand under or near a trailer being lifted.
- Keep hands, feet, and clothing clear of pinch points.
- Maintain **line-of-sight communication** between operators and spotters.
- Conduct **monthly safety audits** to ensure compliance.

Documentation

- Inspection forms for each trailer.
- Damage reports for any discrepancies.
- Daily down stacking log including operator, trailer ID, and time.
- Inventory updates in the company management system.

Training

- All operators must be **certified** for forklifts and lifting equipment.
  Total of **3 employees** at each dealership are required to be certified **(see email below)**
- Annual safety refresher training for all required staff.

You Have Been Enrolled // Liftoff Certifications External Inbox ×

Add to Calendar

Liftoff Certifications <support@liftoffcerts.com>
to me

Dec 8, 2025, 6:00 PM

Hi Preston,

You have been enrolled in BCMS Investments, LLC – Forklift Certification.

To login to your account, visit liftoffcerts.com/my-account. If you do not remember your password or cannot find the temporary password we emailed you, click here to reset it.

Once logged in, click **My Courses** in the menu. If you are on your phone, click the menu bar in the top right corner.

Then click the training and you will be taken to your course overview. You can take either the English or the Spanish version of the training.

If you have any questions at all, we have live chat on our website.

Enjoy your training!

Regards,

Jim

support@liftoffcerts.com

LIFTOFF CERTIFICATIONS
Live Chat at liftoffcerts.com
Support hours: M-F // 6AM - 8PM PT

- Training on inspection checklist completion and damage reporting.

Inventory Cycle Audit

Purpose

Ensure accurate inventory tracking of trailers by conducting a monthly physical count, reconciling with system records, and investigating variances to prevent loss or errors.

Key Principles

- Inventory is **everyone's responsibility**.
- Monthly physical counts are required and must match the system (Lightspeed).
- Variances may result from theft, misplaced trailers, or mishandled repos.
- Reports, along with supporting documentation, are emailed to **Julie Fullerton** and maintained in a local inventory review file.

Cycle Count Steps

1. Planning and Preparation

- **Schedule the count** and inform the team to avoid duplicate or missed counts.
- **Prepare the lot**: clean and organize, minimize trailer movement during the count.
- **Assemble the counting team**: managers provide training.
- **Managers need to** oversee and control the count process.

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2. Proper Cut-Off

- Ensure **all trailer activity is properly documented** before counting:
    - Repossessed trailers → recorded as repos.
- Any sales during the count remain on the inventory list until all counts are recorded.

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3. Execution

- Physically count all trailers on the lot.
- Compare counts to the Lightspeed inventory report.
- Document all findings accurately.

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4. Entering the Count

- Input the count results into the inventory system.
- Ensure all trailers are correctly logged with VIN and location.

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5. Analysis of Results

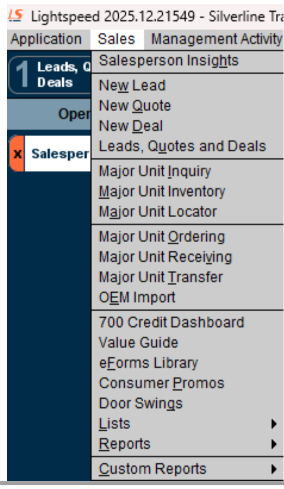
- Investigate all variances and determine root causes.
- Implement process changes if necessary.
- Controller approves the audit, signs off, and communicates **pass/fail status via email**.

Floor Plan Audits

- **Auditor contacts controller** if a trailer appears missing.
- Controller requests documentation from the lot manager: sold, transferred, or physically present.
- Respond to **original email only**, attach required documents.
- For **transfers**:
  - Obtain **current pictures** of the trailer and VIN sticker.
  - Copy other lot manager confirming physical presence at their lot.
- For **sold trailers**:
  - Attach contract, include customer name and sold date in email body.
- Multiple trailers: clearly indicate which documents/pictures correspond to each VIN.
- **Previous photos or system images are not accepted**; current verification is mandatory to confirm the trailer's status.

Key Notes:

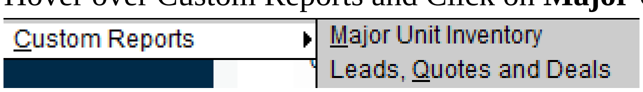
- Accuracy, documentation, and timely communication are critical.
- Maintain clear records to prevent losses and simplify audits.
- Monthly adherence ensures reliable inventory reporting and floor plan compliance.



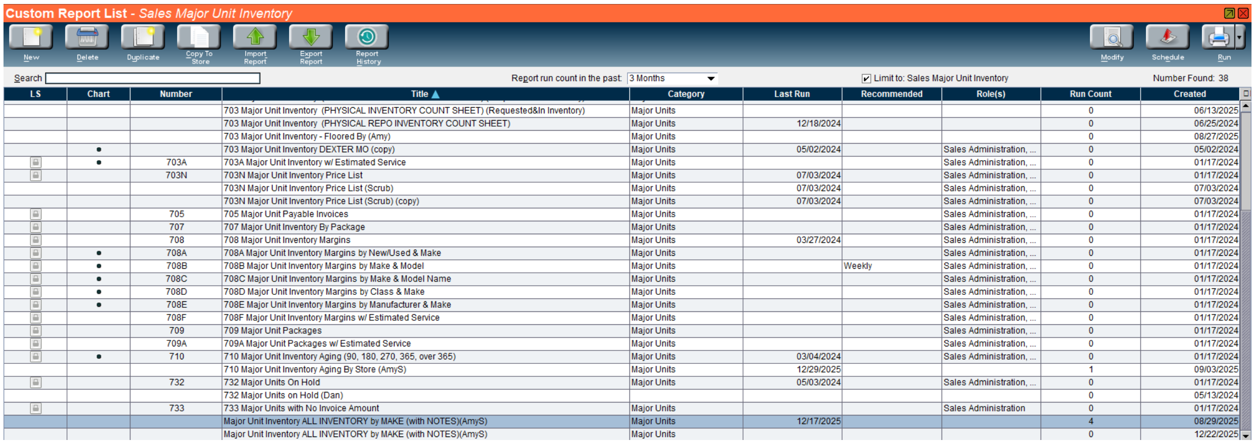
Lightspeed Major Unit Inventory Audit Process

- Log into your Lightspeed store portal
- Go to the **Sales Tab** in the top Left

- Hover over Custom Reports and Click on **Major Unit Inventory**



- Scroll down to the bottom of the list and double click on **Major Unit Inventory ALL INVENTORY by MAKE (with NOTES)**



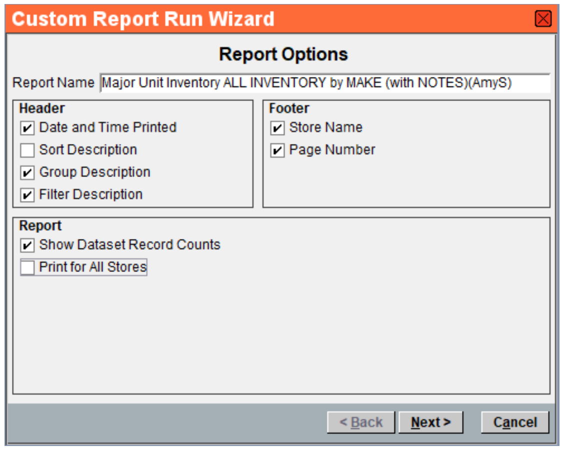
Custom Report List - *Sales Major Unit Inventory*

New | Delete | Duplicate | Copy To Store | Import Report | Export Report | Report History | Modify | Schedule | Run

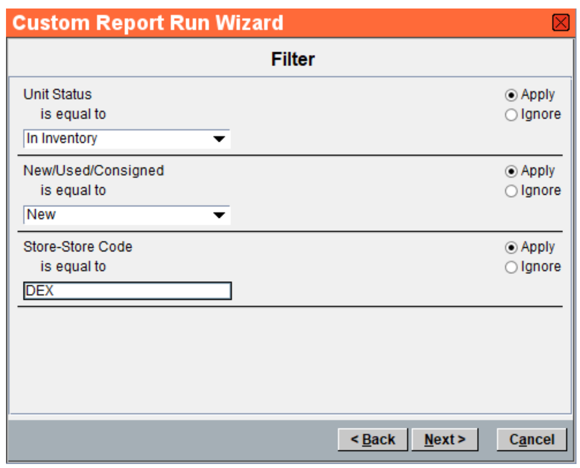
Search | Report run count in the past: 3 Months | Limit to: Sales Major Unit Inventory | Number Found: 38

LS	Chart	Number	Title	Category	Last Run	Recommended	Role(s)	Run Count	Created
			703 Major Unit Inventory (PHYSICAL INVENTORY COUNT SHEET) (Requested&In Inventory)	Major Units				0	06/13/2025
			703 Major Unit Inventory (PHYSICAL REPO INVENTORY COUNT SHEET)	Major Units	12/18/2024			0	06/25/2024
			703 Major Unit Inventory - Floored By (Amy)	Major Units				0	08/27/2025
	•		703 Major Unit Inventory DEXTER MO (copy)	Major Units	05/02/2024		Sales Administration, ...	0	05/02/2024
	•	703A	703A Major Unit Inventory w/ Estimated Service	Major Units			Sales Administration, ...	0	01/17/2024
		703N	703N Major Unit Inventory Price List	Major Units	07/03/2024		Sales Administration, ...	0	01/17/2024
			703N Major Unit Inventory Price List (Scrub)	Major Units	07/03/2024		Sales Administration, ...	0	07/03/2024
			703N Major Unit Inventory Price List (Scrub) (copy)	Major Units	07/03/2024		Sales Administration, ...	0	07/03/2024
		705	705 Major Unit Payable Invoices	Major Units			Sales Administration, ...	0	01/17/2024
		707	707 Major Unit Inventory By Package	Major Units			Sales Administration, ...	0	01/17/2024
		708	708 Major Unit Inventory Margins	Major Units	03/27/2024		Sales Administration, ...	0	01/17/2024
	•	708A	708A Major Unit Inventory Margins by New/Used & Make	Major Units			Sales Administration, ...	0	01/17/2024
	•	708B	708B Major Unit Inventory Margins by Make & Model	Major Units		Weekly	Sales Administration, ...	0	01/17/2024
	•	708C	708C Major Unit Inventory Margins by Make & Model Name	Major Units			Sales Administration, ...	0	01/17/2024
	•	708D	708D Major Unit Inventory Margins by Class & Make	Major Units			Sales Administration, ...	0	01/17/2024
	•	708E	708E Major Unit Inventory Margins by Manufacturer & Make	Major Units			Sales Administration, ...	0	01/17/2024
		708F	708F Major Unit Inventory Margins w/ Estimated Service	Major Units			Sales Administration, ...	0	01/17/2024
		709	709 Major Unit Packages	Major Units			Sales Administration, ...	0	01/17/2024
		709A	709A Major Unit Packages w/ Estimated Service	Major Units			Sales Administration, ...	0	01/17/2024
	•	710	710 Major Unit Inventory Aging (90, 180, 270, 365, over 365)	Major Units	03/04/2024		Sales Administration, ...	0	01/17/2024
			710 Major Unit Inventory Aging By Store (AmyS)	Major Units	12/29/2025			1	09/03/2025
		732	732 Major Units On Hold	Major Units	05/03/2024		Sales Administration, ...	0	01/17/2024
			732 Major Units on Hold (Dan)					0	05/13/2024
		733	733 Major Units with No Invoice Amount	Major Units			Sales Administration	0	01/17/2024
			Major Unit Inventory ALL INVENTORY by MAKE (with NOTES)(AmyS)	Major Units	12/17/2025			4	08/29/2025
			Major Unit Inventory ALL INVENTORY by MAKE (with NOTES)(AmyS)	Major Units				0	12/22/2025

- Select **Store Name** in the **Footer Column** and Deselect **Print for All Stores** in the **Report Column.** Click the **Next** button.



- You will run this report **3 times** for: **New, Consigned and Used inventory.**



- Your **Store-Store Code** will be the **FIRST 3 letters** of your stores name: (example: Dexter – DEX, Jonesboro – JON, Festus – FES). Click the **Next** button.
- Select **Save To PDF File**. Click the **Finish** button.

- Once you have ran the report, the PDF will open as it is listed below. Use this to do your inventory audit each month. Utilize the **Notes** portion to list any **damages, sold units, auction units, etc.**

Major Unit Inventory ALL INVENTORY by MAKE (with NOTES)(AmyS)

Printed On: 01/05/2026 2:13 PM

Group By: Unit Make

Filter: (Unit Status is equal to 'In Inventory' and New/Used/Consigned is equal to 'New' and Store-Store Code is equal to 'DEX')

Stock #	VIN 1	N / U	Year	Make	Model	Color	Age	Unit Status	Store-Store	Notes
6N2156179	16V1W2426N2156179	New	2022	Big Tex	Wood Deck	Black	803	In Inventory	DEX	
7R6034488	5WWGF2527R6034488	New	2024	Delco	Steel Deck	BLACK	369	In Inventory	DEX	
7TE048915	58SBF2027TE048915	New	2026	East Texas	BP - HD	Black	33	In Inventory	DEX	
4TE049720	58SBM2224TE049720	New	2026	East Texas	CAR	Black	33	In Inventory	DEX	
0TE048855	58SBM2220TE048855	New	2026	East Texas	CAR	Black	33	In Inventory	DEX	
4PE037605	58SGF4024PE037605	New	2023	East Texas	Deckover	Beige	937	In Inventory	DEX	
5PE033598	58SBC1825PE033598	New	2023	East Texas	Dream	Red	1130	In Inventory	DEX	
3TE049670	58SGD2023TE049670	New	2026	East Texas	GN - Dump	Black	33	In Inventory	DEX	
5TE049671	58SGD2025TE049671	New	2026	East Texas	GN - Dump	Black	33	In Inventory	DEX	
1PE033235	58SGM2821PE033235	New	2023	East Texas	Lowboy	Gray	1224	In Inventory	DEX	
1SE043697	58SGM4021SE043697	New	2025	East Texas	Lowboy	black	495	In Inventory	DEX	
B00044407	44407	New	2025	East Texas	Roll off Bin	black	467	In Inventory	DEX	
B00003615	3615	New	2026	East Texas	Roll off bin	Smoke	202	In Inventory	DEX	
B00003617	3617	New	2026	East Texas	Roll off bin	Smoke	202	In Inventory	DEX	
B00002491	2491	New	2026	East Texas	Roll off Bin	green	222	In Inventory	DEX	
B00000175	175	New	2023	East Texas	Roll off Bin	BITTERSW	318	In Inventory	DEX	
B00000394	394	New	2025	East Texas	Roll off bin	green	294	In Inventory	DEX	
B00003625	3625	New	2026	East Texas	Roll Off Bin	Charcoal	181	In Inventory	DEX	
B00002492	2492	New	2026	East Texas	Roll off Bin	green	222	In Inventory	DEX	
B00000174	174	New	2023	East Texas	Roll off Bin	BITTERSW	318	In Inventory	DEX	
B00003613	3613	New	2026	East Texas	Roll off bin	black	202	In Inventory	DEX	
B00003632	3632	New	2026	East Texas	Roll Off Bin	Charcoal	175	In Inventory	DEX	
B00000281	281	New	2023	East Texas	Roll off Bin	BITTERSW	301	In Inventory	DEX	
B00003628	3628	New	2026	East Texas	Roll Off Bin	Black	175	In Inventory	DEX	
B00000096	96	New	2023	East Texas	Roll off Bin	KAWASAKI	301	In Inventory	DEX	
2496	2496	New	2026	East Texas	Roll Off Bin	Bittersweet	231	In Inventory	DEX	
B00003609	3609	New	2025	East Texas	Roll Off Bin	Smoke	182	In Inventory	DEX	
B00002486	2486	New	2026	East Texas	Roll off Bin	Orange	222	In Inventory	DEX	
B00000176	176	New	2023	East Texas	Roll off Bin	BITTERSW	318	In Inventory	DEX	
B00000185	185	New	2023	East Texas	Roll off Bin	KAWASAKI	292	In Inventory	DEX	
B00003631	3631	New	2026	East Texas	Roll Off Bin	Charcoal	175	In Inventory	DEX	
B00000095	95	New	2023	East Texas	Roll off Bin	KAWASAKI	0	In Inventory	DEX	
B00003608	3608	New	2025	East Texas	Roll Off Bin	Smoke	182	In Inventory	DEX	
B00003641	3641	New	2026	East Texas	Roll Off Bin	Charcoal	167	In Inventory	DEX	
B00000094	94	New	2023	East Texas	Roll off Bin	KAWASAKI	301	In Inventory	DEX	
B00002487	2487	New	2026	East Texas	Roll off Bin	Orange	222	In Inventory	DEX	
B00002485	2485	New	2026	East Texas	Roll off Bin	Orange	222	In Inventory	DEX	
B00003616	3616	New	2026	East Texas	Roll off bin	Smoke	202	In Inventory	DEX	
B00000182	182	New	2023	East Texas	Roll off Bin	BITTERSW	292	In Inventory	DEX	
B00000092	92	New	2023	East Texas	Roll off Bin	KAWASAKI	292	In Inventory	DEX	
B00002495	2495	New	2026	East Texas	Roll Off Bin	Bittersweet	231	In Inventory	DEX	

Silverline Trailers - Dexter

Page 1

Customer Service and Employee Representation Guidelines

Personal Representation

Appearance & Clothing:

- Wear clean clothes; neat shirts, jeans or pants with no holes.
- Maintain good posture; no feet on desks.
- Personal hygiene is required; cleanliness is a must.

Attitude & Actions:

- Be polite, respectful, and professional at all times.
- Everything you say, do, or wear reflects Silverline’s image.
- Remember: you are the face of the company; create positive impressions.

Customer Service Principles

Greeting & Engagement:

- Make customers feel welcomed and comfortable.
- Greet with a smile.

Respect & Relatability:

- Always be polite; never be rude or disrespectful.
- Build rapport and connect with customers genuinely.

Post-Sale Relationship:

- Customer interactions don’t end when they leave the lot.
- Follow up for misplaced paperwork, warranty questions, or general inquiries.
- Provide accurate and timely information.

Department Knowledge

- Know which department to contact for customer questions (e.g., titles, repos, warranties).
- Understand the process for slow-moving items like REPO titles (may take weeks to months).
- Handle upset customers calmly; avoid arguments.
- Escalate issues to the proper department when necessary.

Escalation Process:

1. Assist the customer to the best of your ability.
2. If unresolved, involve the **Sales Manager**.
3. If still unresolved, escalate to **Customer Service**.
4. Always follow proper communication channels to resolve the issue.

Example:

- Title issue → escalate to **Title Department** → if unresolved, involve Sales Manager → then Customer Service.
- Always support the customer throughout the process and provide updates.

Key Takeaways:

- Professionalism, courtesy, and knowledge are essential.
- Post-sale customer care is critical for maintaining trust.
- Proper escalation ensures customer issues are resolved efficiently.

Financing Contracts Policies and Procedures

Lightspeed Attachment Requirements for Finalization

PMB

- Front & Back of MCO
- Front & Back of Valid (NON-EXPIRED) DL
- Valid Insurance for Towing Vehicle
- Two Proofs of Residency
- Completed RTO Streamline App
- Bill of Sale
- Happy Sheet (NEW)
- Manufacturer’s Invoice
- Declination of Optional Protection Products
- 8300 Form (if over $10,000)
- Credit Card Authorization (card transactions only)
- Copy of Cashier’s Check (if paid with)
- Title Shipping Label

Summit (NEW)

- Front & Back of MCO
- Front & Back of Valid (NON-EXPIRED) DL
- Valid Insurance for Towing Vehicle
- Picture of VIN Sticker on Trailer
- Picture of Both GPS Units
- Completed RTO Streamline App
- Bill of Sale
- Happy Sheet (NEW)
- Manufacturer’s Invoice
- Declination of Optional Protection Products
- 8300 Form (if over $10,000)
- Credit Card Authorization (card transactions only)
- Copy of Cashier’s Check (if paid with)
- Title Shipping Label

Summit / Hometowne (REPO)

- Front & Back of Valid (NON-EXPIRED) DL
- Completed RTO Streamline App
- Picture of VIN Sticker on Trailer
- Bill of Sale
- Happy Sheet (USED)
- Previously Owned Trailer Agreement
- Manufacturer's Invoice
- Declination of Optional Protection Products
- Credit Card Authorization (card transactions only)
- Copy of Cashier's Check (if paid with)

Hometowne (NEW)

- Front & Back of MCO
- Two Proofs of Residency
- Completed RTO Streamline App
- Happy Sheet (NEW)
- Bill of Sale
- Manufacturers Invoice
- Declination of Optional Protection Products
- 8300 Form (if over $10,000)
- Credit Card Authorization (card transactions only)
- Copy of Cashier's Check (if paid with)
- Front & Back of Valid (NON-EXPIRED) DL
- Title Shipping Label

Clicklease / Lift

- Front & Back of MCO
- Clicklease Purchase Order
- Front & Back of Valid (NON-EXPIRED) DL
- Happy Sheet (NEW)
- Dealer-Created Invoice
- Manufacturer’s Invoice
- Declination of Optional Protection Products
- 8300 Form (if over $10,000)
- Credit Card Authorization (card transactions only)
- Copy of Cashier’s Check (if paid with)
- Title Shipping Label

Cash / Credit Card

- Front & Back of Valid (NON-EXPIRED) DL
- Bill of Sale
- Happy Sheet (NEW)
- Lug Nut Inspection
- Picture of VIN Sticker on Trailer
- Picture of Trailer
- Manufacturer’s Invoice
- Declination of Optional Protection Products
- 8300 Form (if over $10,000)
- Credit Card Authorization (card transactions only)
- Copy of Cashier’s Check (if paid with)

Cash / Credit Card (REPO)

- Front & Back of Valid (NON-EXPIRED) DL
- First Page of RTO Streamline Contract
- Bill of Sale
- Happy Sheet (USED)
- Lug Nut Inspection
- Declination of Optional Protection Products
- Previously Owned Trailer Agreement
- Picture of VIN Sticker on Trailer
- Picture of Trailer
- 8300 Form (if over $10,000)

- Credit Card Authorization (card transactions only)
- Copy of Cashier’s Check (if paid with)

Traditional Financing (Synchrony/Sheffield/etc.)

- Front & Back of Valid (NON-EXPIRED) DL
- Bill of Sale
- Happy Sheet (NEW)
- Lug Nut Inspection
- Picture of VIN Sticker on Trailer
- Picture of Trailer
- Manufacturer’s Invoice
- Declination of Optional Protection Products
- 8300 Form (if over $10,000)
- Credit Card Authorization (card transactions only)
- Copy of Cashier’s Check (if paid with)

Frequent Title Issues & Requirements

Title Assignment Issues

- The **Silverline assignment box** is used when selling **dealer to dealer** (see attached examples).
- **Dealer number** is required (if applicable).
- Title must be **signed by the dealer or authorized agent**.
- The name on the **"Seller" line must read exactly:**
  "Silverline Trailers"
  - Do **not** include location name or town.
  - The **address line** identifies the specific location/town.
- When signing a title over to another Silverline location:
  - The **front location** must match the **selling location on the back**.
  - All information must be correct.
- **Titles CANNOT be corrected using white-out.**

New MSO / MCO Requests

- All **new MSO/MCO requests must go through the Corporate Office**.
- When requesting a new MSO/MCO:
  - You **must email a copy of the old MSO/MCO**.
  - This is required so a proper replacement request can be submitted.

Derates / Uprates

- The **derate/uprate form must be completed by the salesperson handling the deal**.
- An **original signature is required**.
  - Example: If a trailer is sold at Richmond, the **Richmond salesperson** completes the form.
- Forms must be emailed **the same day the trailer is sold** to:
  titles@silverlinetrailer.com
- Requirements:
  - Correct **GVWR** must be listed.
  - A **copy of the title** must be sent with the form.
  - Must be included in the **Lightspeed attachments**.
- **Customers may NOT leave with the hard copy of the title.**

- Once a trailer is titled, it **cannot be rerated**.
- **ALL derate requests** must have the following **email subject line format**:
  Customer Name – Last 4 of VIN – New GVWR
  - Example: *John Smith – 1234 – 5,000*
- **REPOS are NOT eligible** for derates or uprates.

Repo Titles

- Salespeople must give **realistic timeframes** to customers.
  - Expect **6–10 weeks minimum**, depending on the state.
- Customers must be informed:
  - **No reimbursement** will be provided for penalty charges.
- Repo trailers must be **reported to lien holders immediately** to begin the repo title process.

Addresses

- Salespeople must ensure **accurate customer addresses**.
- Many titles are rejected due to **incorrect address information**.
