

## Move Notes

- Every call/action needs to be noted – anyone should be able to pull up the move at any time and know exactly what is going on.
- Note each call/action individually rather than one note for multiple calls with multiple parties.
- Note follow ups and updates – if the communications is by email, copy/paste the email in the move for that note.

**If it's not noted, it didn't happen!**

### Note details

- Summary title: A specific summary including who the communication is with when applicable
  - o Vendor follow up
  - o Vendor update
  - o Customer follow up
  - o Customer update
  - o Client follow up
  - o Client Update
  - o Vendor ETA change
  - o Customer requested Delivery Loc change
  - o Updated client on new delivery loc
  - o Client approved new delivery location
  - o ARS quote approval
  - o Vendor callback
- Body: a brief and detailed notation outlining who you spoke to, the situation, any action needed and resolution.
  - o Who you spoke to and direct contact info when applicable
    - [Name] with [Client]
    - Customer [Name]
    - [Name] with Del Loc [Shop name]
    - Adjuster [Name] [Phone #]
  - o Situation
    - Requesting additional funds (including template)
    - Customer requested delivery loc change from [original address] to [new address]
    - Updated client on customer requested loc change from [original address] to [new address]
  - o Action needed
    - Calling [client] for approval
    - Per [Client], we need to collect the overage from customer directly
    - [Client] advised they will talk to a manager for approval and call TP back in 10 minutes
  - o Resolution

- [Client] approved \$xxx
- Client approved new delivery location [address] and updated loaded miles to 36.7