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Yard: _____ Worksheet version: _____

Yard phone handover kit

One approved set of answers for the people handling your yard's calls. Complete one copy per location, then review it with your team.

Start here: Fill the blanks from your yard's current records. Use an explicit date, time and time zone. If a fact is missing, expired or conflicting, ask the named owner to confirm it. Never fill a gap by guessing.

This is a staff planning worksheet. It does not configure PhoneOps AI or activate forwarding. Confirm and test your chosen phone setup separately.

YARD AND SOURCE OF TRUTH

Yard / location name

Yard time zone

Public address / directions

Main business number

STANDARD OPENING HOURS

Write "closed" where needed. Gate closing and last scale / load acceptance can differ.

Day	Open	Gate closes	Last scale / load	Approved note
Monday				
Tuesday				
Wednesday				
Thursday				
Friday				
Saturday				
Sunday				

HOLIDAY OR TEMPORARY EXCEPTION

Exact date(s) / reason

Open, close and last load / scale time

Approved by / updated at with time zone

Apply a dated exception only for its stated dates. If schedules conflict or the caller's arrival would be after cutoff, use the approved handoff path instead of promising acceptance.

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Prices and material rules

Record only prices and material instructions your yard has approved. Duplicate this page if you need more entries.

Use a rate only when all details match: material, grade, unit, currency, conditions, approval and validity. Do not guess a grade, convert units or extend a promise without an approved rule.

APPROVED RATE 1

Material and grade

Price / currency / exact unit

Source record / update owner

Approved by

Last updated: date, time, zone

Valid until: date, time, zone

Quote conditions / yard-approved wording

APPROVED RATE 2

Material and grade

Price / currency / exact unit

Source record / update owner

Approved by

Last updated: date, time, zone

Valid until: date, time, zone

Quote conditions / yard-approved wording

ACCEPTED AND REJECTED MATERIALS

Use “accepted”, “rejected” or “staff must confirm”. A blank or unlisted material always needs staff confirmation.

Material / condition	Decision	Approved caller instructions

Material-rule approver / source / last reviewed

Use only yard-approved ID, ownership, payment, preparation and disposal instructions.

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Human handoff and intake

Decide who handles the calls that need a person, when they are available and what happens when nobody answers.

PRIMARY AND BACKUP CONTACTS

Primary: name / role / contact destination

Coverage hours and time zone

Use for these questions / triggers

Backup: name / role / contact destination

Coverage hours and time zone

Use for these questions / triggers

After-hours / no-answer / failed-transfer instruction

Approved caller wording and any callback commitment

A transfer attempt is not a guaranteed answer. Use only an agreed, tested path. Do not promise a callback time, pickup, booking, price or purchase unless the responsible yard owner has approved it.

MINIMAL COMMERCIAL CALLER INTAKE

For a staff follow-up request. Keep the caller's wording; mark estimates and unknowns. Copy this section for each call.

Call date / time / zone and reason for calling

Caller name (optional) / business if relevant

Callback number, if follow-up requested

Material / grade as described by caller

Approximate quantity and exact unit

Requested next step / relevant timing or location

Staff recipient / agreed contact window, if any

Keep it minimal: Confirm the callback number by reading it back. Do not request passwords, payment-card details or ID numbers. Keep completed sheets in the yard's approved private location; the yard decides access and retention. Do not publish filled worksheets.

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Proposed phone scripts

These are suggested starting points, not live settings or promises of product behavior. The yard owner must complete and approve the final wording on an attached script sheet, using the yard and worksheet version above.

Hours and last load

“For [exact date], [yard] is [open from time to time / closed]. The last [scale / load] time is [time and zone]. [Approved arrival instruction].”

Check today’s dated exception before using the standard schedule.

Current approved price

“Our approved posted price for [material and grade] is [amount and currency] per [unit], subject to [approved conditions]. That price is valid until [date, time and zone].”

Use only when the record is complete, approved, current and matches the caller’s material.

Missing, expired or unclear price

“I need the yard to confirm that price before I give you a number. [Approved next step].”

Do not read an old price as current or guess the caller’s grade.

Material acceptance

“Our approved instructions for [material and condition] are [exact instructions].” If unlisted or unclear: “The yard needs to confirm whether it can accept that. [Approved next step].”

A caller’s description is not a physical inspection or a promise to accept the load.

A caller asks for a person

“[Approved transfer or contact instruction].” If nobody answers: “[Approved and tested no-answer wording / fallback].”

Do not say someone has been reached until connected. Use no callback deadline unless approved.

Commercial load or custom request

“The yard needs to review that request. If you’d like staff to follow up, may I take your callback number and a brief description of [relevant request details]?”

Capture only what the yard needs. Do not promise a quote, collection, booking or completed scale ticket.

Script reviewer: _____ Approval date: _____

Approved script sheet / version reference (attach the completed scripts)

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Forwarding activation checklist

Complete this with the person responsible for your phone service. This sheet does not supply carrier codes, change your number or activate any service.

WRITE THE EXACT PLAN FIRST

Phone carrier / service and authorized account owner

Existing business number

Verified forwarding destination

Selected mode: after-hours / busy / unanswered / other

Exact schedule, time zone and trigger

Carrier instructions / verified source and date

How to turn forwarding off and restore normal routing

BEFORE ANY LIVE ACTIVATION

- ☐ Confirm that the carrier supports the exact forwarding mode you intend to use.
- ☐ Confirm who is allowed to change the settings and whether any charges apply.
- ☐ Verify the destination number and agree on the hours, handoff and no-answer path.
- ☐ Record the existing settings and confirm the restore steps with the authorized owner.
- ☐ Approve a controlled test plan, who will receive test calls and when the test will occur.

TEST AND DECIDE WHETHER TO ACTIVATE

- ☐ Run the approved normal, busy, unanswered and after-hours cases that apply.
- ☐ Check actual arrival, two-way audio, handoff outcome and fallback; record failures.
- ☐ Verify normal routing can be restored. If a required case fails, restore it and resolve the fault.
- ☐ Have the yard owner approve the tested scope before expanding live coverage.

Activation owner: _____ Approved test window / zone: _____

Live test record / result reference (attach results and corrections)

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Review before the handover

Use these tabletop checks before any live test. Read the actual approved records, follow the proposed response and write what happened. A blank result is untested.

Test question or situation	Expected handling	Result / correction
Current price; correct grade and unit	Use only the complete, current approved record and its conditions.	
Price expired or missing; grade unclear	Give no price. Follow the approved confirmation path.	
Holiday or arrival after scale cutoff	Use the dated exception and cutoff. Do not promise load acceptance.	
Unlisted or rejected material	Use the approved rejection wording or ask staff to confirm.	
Commercial load; caller asks for a deal	Capture minimal relevant details. Make no unapproved commitment.	
Primary contact does not answer	Follow the tested fallback; never claim a guaranteed connection.	
Caller asks for a ticket, booking or pickup	State only what is approved. Route unsupported requests to staff.	
Conflicting records or no approved answer	Stop using the disputed answer. Ask the named owner to resolve it.	

VERSION AND APPROVAL

Yard worksheet version / effective date and zone

Completed by / reviewed by

Owner approval / date and time

Next review date / owner responsible for updates

Where the current copy is kept / who receives changes

Release check: All required blanks completed; stale answers removed; scripts approved; unresolved test failures corrected; old copies replaced. Price validity windows still apply even when the overall worksheet has a later review date.

This worksheet records your operating decisions. Confirm what your chosen phone service actually supports and test the configured behavior before relying on it.