



Client Orientation Checklist

See Boat Owner's Manual, Mercury Outboard manual and Shoreland'r Manual for full instructions and safety reminders. ✓ Check all items explained.

TRAILER: Here are some added reminders.

- Demonstrate operation and safety features of the winch stand/strap ensuring that it feeds under the rubber roller.
- Demonstrate Jack & Dolly wheel operation (up, down, swivel, do not force when retracting, always swivel to maximize turning room)
- Visually inspect all nuts and bolts for tightness, tighten if necessary.
- Explain the bearing buddy system operation and function including how to check when full and empty.
- Explain that client must check lights and tighten wheel nuts and all trailer bolts after first 100 miles and every 300 miles for safety.
- Show the proper operation of the rear tie-down straps and of the trailer coupler.
- Demonstrate how to change the tail light on trailer

LAUNCHING: Here are some added reminders.

- Ensure that boat plug is properly installed. Ensure that trailer tie downs are off and that trailer lights are unplugged.
- Ensure that safety chain and winch strap are engaged and secure. Inspect loading ramp for under water obstacles before backing in.
- Check water for proper operating depth and for under-surface obstacles. Ensure that motor is in water and started before releasing boat.
- Release the safety chain and winch strap. Ensure that mooring lines are attached and have someone on land holding them during launch.
- Launch boat and pull trailer out of water and away from the ramp. Allow engine to warm up at dock before getting underway.

OUTBOARD: Complete Mercury's Pre-Delivery Checklist. Client's Initials : _____

- Explain the features of the Mercury control. Forward, reverse, neutral, throttle only and lanyard stop. Explain why not to shift when engine is not running.
- Explain the general procedures for starting, for break-in and running. Demonstrate how to remove and reinstall cowl. Give procedure for manual start. Engine fuse location(s), safety cord. Dip-stick location (four strokes).
- Explain importance of tightening and checking engine bolts on remote models and thumb screws on tiller motors, even if a motor lock has been installed.
- Explain the importance of the 20 hour inspection and the importance of scheduling future service as per the maintenance schedule.
- Caution about trimming the motor with rear bench in up position or seat in rear position. Move the bench, top or any obstacles to prevent damage to motor while in use or while trailering.

LOADING : Here are some added reminders.

- Reverse trailer into water leaving approx. 12" of the bunks dry. Ensure engine is tilted up enough as not to contact the bottom.
- Advance slowly onto trailer keeping the bow nose between the bunks. Then attach the winch strap and safety chain.
- Shut engine off and flip the bench, fold top and remove any obstacles before trimming to avoid damage to outboard.
- Pull the boat and trailer slowly out of the water ensuring the boat remains centred on the trailer. Re-tighten the winch strap, install both trailer tie downs and remove boat plug and stow where you will find it next time.
- In general if the boat is in the water, the boat plug should be in. If the boat is out of the water, the plug should be out and hull tilted up for drainage.
- Demonstrate the proper positioning of the outboard for trailering . If equipped, demonstrate transom saver use as well.
- Explain that all loose items like cup holders, tables, personal belongings, cushions, seats, etc. must be securely stowed at all times, especially for trailering . Explain that tops and related canvas pieces must also be stowed and secured.

BOAT : This part of the presentation is model specific. It is important to fully cover each and every aspect of the new boat.

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| <input type="checkbox"/> Trolling motor – purpose, operating instructions, battery location and recharging, trailering position, foot pedal operation (should be unplugged when not in use) , etc. IMPORTANT: Warn that these electric motors provide instant power. If the motor is pointing at a 90 degree angle to the boat, and the power is set to full, activating the motor in this position could result in sudden movement of the boat. | <input type="checkbox"/> Demonstrate the livewell operation. Show location of livewell pump, intake and drain. Explain and install all livewell plugs, stand pipes and flow-rite injectors. On Gen X models: Explain & demonstrate how the adjustable taps open to allow or block the water flow. The taps are closed at factory and must be opened to operate. |
| <input type="checkbox"/> Explain Deep cycle and cranking battery location along with the circuit breaker (fuse) location. Remove and vent battery for safe charging. | <input type="checkbox"/> Boat keys for ignition and locking storage compartments are present, tested and given to client. Write key number in space provided below. |
| <input type="checkbox"/> If the boat has an integrated bow panel, show features. | <input type="checkbox"/> Demonstrate fish-finder operation and features, power head removal, transducer location and adjustment. |
| <input type="checkbox"/> Demonstrate bow and stern light operation. Explain the anchor light function. | <input type="checkbox"/> Be sure to lubricate all seat pedestals, seat and floor bases with a light silicone spray containing Teflon. Perform lubrication monthly. Non-locking seats in some models must also be removed for trailering. |
| <input type="checkbox"/> Explain the function of the bilge pump. When to use. Do not run dry. | <input type="checkbox"/> Point out that the wiring is circuit breaker protected and indicate how to reset breakers. |
| <input type="checkbox"/> Remind customers to be sure lights and other 12volt items are off before leaving the boat. | <input type="checkbox"/> Explain that due to the vents on the bottom of the chairs, that they should not be stored upside down as they will fill with rainwater. |
| <input type="checkbox"/> Removable windscreens on side consoles must be removed for travel cover installation or trailering. Remember: clips rotate only ¼ turn. | <input type="checkbox"/> Explain that the center door is to be closed and secured for trailering or boating at high speeds. |
| <input type="checkbox"/> EXPLAIN & DEMONSTRATE the top. Show how all curtains are installed and stored (rolled not folded). Show how to release pull-the-dot snaps and regular snaps. Show how to store the top for trailering. Explain that the top is not to be left up when trailering. | <input type="checkbox"/> Important: Explain that the storage compartments are used to securely store items and are NOT waterproof. If there are items that must be kept dry, a plastic zip-lock bag or watertight bag should be used. Legend is not responsible for water damage to any personal items. |
| <input type="checkbox"/> Converta -bench system demonstration including proper storage for casting deck use and trailering. | <input type="checkbox"/> Do final walk around with the client to point out things like fuel tank vents, livewell overflows, speedometer pitot, transducers, etc... |

Release Form :

	Yes	No		Yes	No
Was your boat, motor and trailer prepared to your satisfaction?	<input type="checkbox"/>	<input type="checkbox"/>	I know who to call for future service or warranty. (provide appropriate phone numbers and names)	<input type="checkbox"/>	<input type="checkbox"/>
Did we explain and demonstrate all of the boats operating features ?	<input type="checkbox"/>	<input type="checkbox"/>	I will read all manuals and follow the recommended maintenance and operating procedures before use.	<input type="checkbox"/>	<input type="checkbox"/>
Have you received manuals for: <u>Mercury Outboard</u> ?	<input type="checkbox"/>	<input type="checkbox"/>	I will ensure all safety equipment is in the boat as recommended in the Canadian Coast Guard Safe Boating Guide.	<input type="checkbox"/>	<input type="checkbox"/>
<u>Legend Boat</u> ?	<input type="checkbox"/>	<input type="checkbox"/>			
<u>Shoreland'r trailer</u> ?	<input type="checkbox"/>	<input type="checkbox"/>			
<u>options and accessories</u> ?	<input type="checkbox"/>	<input type="checkbox"/>			
I understand that my boat must be brought to this selling dealership for any future repairs or service.	<input type="checkbox"/>	<input type="checkbox"/>	All Mercury clients receive a customer satisfaction survey. You will be asked to rate the service we have provided you thus far. We depend on the perfect ratings received from these surveys Do you agree we should receive a perfect score? If No, what can we do to earn a perfect score? (answer on a separate sheet of paper and hand in to dealer)	<input type="checkbox"/>	<input type="checkbox"/>

This is to certify that my boat package was received in good condition and that Legend Boats and _____ (retail dealer) are not responsible for any damages incurred after leaving the property.

Client's signature : _____ Date : _____

Legend Warranty Registration :

Complete the above checklist. Fill out all information below and submit completed copies (pink and golden rod) to Legend Boats. Give your client the white copy and retain the yellow copy for dealer records.

Last Name: _____ Dealer : _____

First Name: _____ Legend Model: _____ Serial #: _____

Middle initial: _____ Mercury Model: _____ Serial #: _____

Address: _____ Shoreland'r Model: _____ Serial #: _____

City: _____ MinnKota Model: _____ Serial #: _____

Province: _____ Postal Code: _____ Key Numbers: Mercury Ignition _____ Lock Box _____ Glove Box _____

Phone:(_____) _____ Fax: (_____) _____ Date of Purchase : ____ / ____ / ____

E-mail: _____ DD MM YY

Note: Dealer must also complete all warranty registrations for Smokercraft/Starcraft, Shoreland'r and Mercury. Forward the Smokercraft/Starcraft warranty card with this form to: Legend Boats, 4805 Regional Road 55, Whitefish, Ontario, Canada, POM 3E0.