

Processing Profiles & Sales Tickets

Cari Office Assistant

__ Fill the order if it has not been filled (*Add a sample, my card & a thank you label to the front with their name on it - Lets start adding cute pink tissue too!*)

__ Put a check on the left next to quantity once item has been picked (*Please Double check to make sure items are correct!! - VERY IMPORTANT!!*)

__ Put a circle on the left next to quantity of any item we owe

__ Log onto Intouch & add items sold to the saved reorder (*if one is not saved create one*)
Check to the right of the item when added to the reorder

__ Verify and/or process payment: notate payment type & date (*if not sure - ask me! We need to make sure cc payments, especially aren't getting missed*)

*if processing payment via credit card, notate auth code if applicable

__ Arrange for delivery if applicable (see script) - THIS IS TOP PRIORITY! IT IS ULTRA IMPORTANT THAT CUSTOMERS GET THEIR ORDERS IN A TIMELY MANNER!! Thank you for helping to take EXCELLENT care of my customers!!

__ Draw 3 boxes at top of sales ticket:

*1st box: Create a new order in my customers on Intouch (*Create new customer for 1st timers*) *Check box when complete*

*2nd box: Load the sales ticket to the weekly accomplishment sheet (*Note any products given away along with Non recovered sales tax*) *Check box when complete*

*3rd box: Paid in Full *Check box when complete*

__ Drop a Thank you note in the order...or in the mail if the order has already been filled (see thank you note script)

__ Please make sure to file in the correct folder (*also make sure to go back & check circle on products owed when filled - make sure to notate this so we are not wondering later*)

__ When delivering - double check to make sure its the correct order before handing to the customer (name should be on the outside of the bag)

__ After Delivery: Please go onto Intouch under the order on my customers & notate how/when the order was delivered/mailed/paid for...as many details as possible. The more we can notate the better - that way we can always easily look back if need be.

****Special note!! Please make sure to weekly go into awaiting payments & products owed and see if we can make some progress here. Contact customers about payments owed to try & resolve swiftly.**