

New customer on boarding

Customer information

START DATE	CUSTOMER NAME	SALES REPRESENTATIVE
[Select Date]	[Project]	

Summary of New Customer On boarding process

- Sales representative closes customer
- Credit application submitted / Credit application approved
- On boarding call scheduled to confirm information and make sure we cover all information on new customer profile
- First order received
- Call scheduled with customer to review first order receipt
- Call scheduled with customer after 30 days to follow up

Project Overview

TASK	ASSIGNED TO	DUE DATE	NOTES
Credit application	Sales representative		
On boarding call scheduled	Sales rep / Inside Sales rep / site Manager		
First order	Customer / sales rep assist		
Call scheduled to review first order	Sales rep		
Call scheduled to review our performance	Sales rep and inside sales rep		
Copy of reviews and any supporting notes sent to customer	Summarized by sales / inside sales		

Summary of first Review

CATEGORY

Items requiring additional follow up

ISSUE	ASSIGNED TO	DATE

Conclusions/summary for General Manager and customer

Summary e-mail / letter to be sent welcoming customer and recapping info

Copy to sales representative and compliance staff.

Customer Information

Name:	_____	Contact:	_____
Phone:	_____	E-mail:	_____
Fax:	_____	Cell:	_____

SALES REPRESENTATIVE FIRST CONTACT

TERRITORY SALES REPRESENTATIVE			
CONTACT INFORMATION		PHONE	
E-MAIL		CELL PHONE	
INSIDE SALES REPRESENTATIVE		PHONE	
		E-MAIL	
<input type="checkbox"/> Customer Provided with Credit application		<input checked="" type="checkbox"/> Credit application approved	
Website www.nuviawater.com			
Website (Dealer login)		Pass Code	
Catalogue		Received <input type="checkbox"/>	More required yes <input type="checkbox"/> no <input type="checkbox"/> amount
Price list		Received <input type="checkbox"/>	
		Hard Copy <input type="checkbox"/>	Electronic Copy <input type="checkbox"/>
PROCESS REVIEW			
ORDERING		E-MAIL	
		PHONE	
Order confirmations should be e-mailed to orders@nuviawater.com			
Prepaid shipments will ship via		TRUCK	COURIER
Collect carrier preference if applicable		TRUCK	COURIER
Account numbers for Collect carriers		TRUCK	COURIER
Select applicable accessory charges ** explain there may be extra charges for these**		TAIL GATE <input type="checkbox"/>	SCHEDULE <input type="checkbox"/>
		RESIDENTIAL <input type="checkbox"/>	HAND UNLOAD <input type="checkbox"/>
		LIMITED ACCESS <input type="checkbox"/>	<input type="checkbox"/>
Primary shipping site			
Expected lead times from Primary site			
Expected Dock to Door performance		Truck Shipments	
(based on standard equipment / parts orders)		Courier Shipments	
Invoicing will be automatic upon shipment via e-mail		E-MAIL INVOICE TO	
Quote for average shipping cost requested		Yes <input type="checkbox"/>	No <input type="checkbox"/>
General appearance of shipments upon receiving		Reviewed <input type="checkbox"/>	
Freight Claims Process		Reviewed <input type="checkbox"/>	Copy to customer <input type="checkbox"/>
Returned goods process		Reviewed <input type="checkbox"/>	Copy to customer <input type="checkbox"/>