

Checklist: Running a Customer Choice Club



Club name: _____

Release date: _____

Begin going through the following checklist two weeks *before the release date*:

- ✓ (Steps marked with (P) apply only to placeholder clubs.)
- Assign web user IDs**
(CUSTOMER list : **Actions** : **Assign Web Identity**)
- Add inventory items**
(INVENTORY list : new record)
- Create/Update selection package**
(PACKAGE list)
- (P) Set placeholder pricing**
(INVENTORY list : *Retail Unit Price*)
- (P) Display placeholder data**
(CUSTOMER list : **Search** : **Display Placeholder Data**)
- Assign selection package to customers**
(CUSTOMER list : **Actions** : **Create Selections** : **Selections from Package**)
- (P) Assign inventory relationship**
(INVENTORY list : **Setup** tab : *Inventory Name*)
- Create member selections**
(CUSTOMER list : **Selection** tab)
- Send selection confirmation e-mail**
(CUSTOMER list : **Actions** : **Send to Customer** : **Email Selection Confirmation**)
- Validate shipping addresses**
(CUSTOMER list : **Actions** : **Address Validation**)
- Update empty box packages**
(PACKAGE list : *Type 'Empty Box'*)
- Update sales tax rates**
(CUSTOMER list : **Actions** : **Assign Sales Tax Code**)

- Create transactions**
(CUSTOMER list : **Actions** : **Create Transaction** : **Sales Order from Selection**)
- Check transactions for errors**
(TRANSACTION list : **View** : **Order Detail, Shipping Detail**)
- Confirm inventory and supplies**
(TRANSACTION list : **View** : **Order Summary, Packaging**)
- Check the label printer**
(Printer is working and sufficient label stock is on hand)
- Check the weather forecast**
(TRANSACTION list : **View** : **Shipping temperature**)

On *the release date*:

- Charge members' credit cards**
(TRANSACTION list : **Actions** : **Credit Card** : **Sale**)
- Print shipping labels**
(TRANSACTION list : **Actions** : **Shipping** : **Create Labels**)
- Send receipts and gift memos**
(TRANSACTION list : **Actions** : **Sales/Credit Receipt** : **Email**)
- Delete pending selections**
(CUSTOMER SELECTION list : *Status* 'Pending' : **Delete**)

Approved: _____