

First Contact

Contact name:

Email:

Organization:

Phone number:

Fax number:

What product(s) are they interested in?

When do they need it by?

Notes:

Response

Provided product descriptions / images

Date provided:

Provided background on Social Enterprise

Date provided:

Provided testimonials from previous clients

Date provided:

Provided info on how to proceed with order

Date provided:

Notes:

Selection

Selection #1

Selection #2

Product selected:

Product selected:

Specifications:

Specifications:

Special features:

Special features:

Quantity:

Quantity:

Delivery date:

Delivery date:

Notes:

Quote

Raw materials supplier (name and phone number):

Raw materials cost:

Total raw material cost (with tax, if applicable):

Post-production work supplier (name and phone number):

Post-production work cost:

Total post-production work cost (with tax, if applicable):

Professional quote provided to customer

Commit

Copy of quote signed by customer and returned to Social Enterprise

Purchase Order sent to customer

__% deposit received from customer and deposited into Social Enterprise account
(if applicable)

Notes:

Preparation

Materials ordered

Est. delivery date:

Additional step

Sample of product prepared or photo available as example for women

If required, sample(s)/photo(s) sent to customer for review

Women informed of upcoming work

Women workers scheduled

Notes:

