

SOP: How to order Crumbl Cookies

Responsible: (Jayson Operation's leader)

Accountable: Brennen & Tracy or the Agent

Consulted: Agent

Informed: Tracy and Brennen or the Agent

Step 1: Go to Gifting Tracker to get the information needed in ordering the cookies.

Always remember that "Not ordered" tagging under 'Cookies' means the agent answered "YES" they wanted to send Crumbl Cookies to their clients, but the cookies haven't been ordered yet. (other tagging - "Answered No" and "Ordered"- self explanatory).

"Inspection Over Date" is your queue that you can order gifts for that client because we don't want the gifts ordered before the inspection contingency is over in case the client backs out based on inspection.

Cookies should be ordered 2 weeks before the day of closing.

Whose Client	Client	Closing Date	Moving Boxes	Cookies	Gifts	Status for Gifts	New Contract gifting	Inspection Over date
Melissa Rupcich	Katie (Katherine) Jensen	12/9/2022	Not Ordered	Not Ordered	Wine	Ordered	Yes	11/21/2022

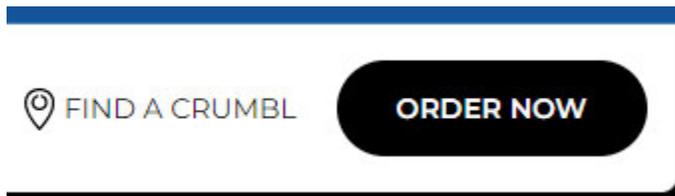
Step 2: Go to <https://crumblcookies.com/>

Sign in with google

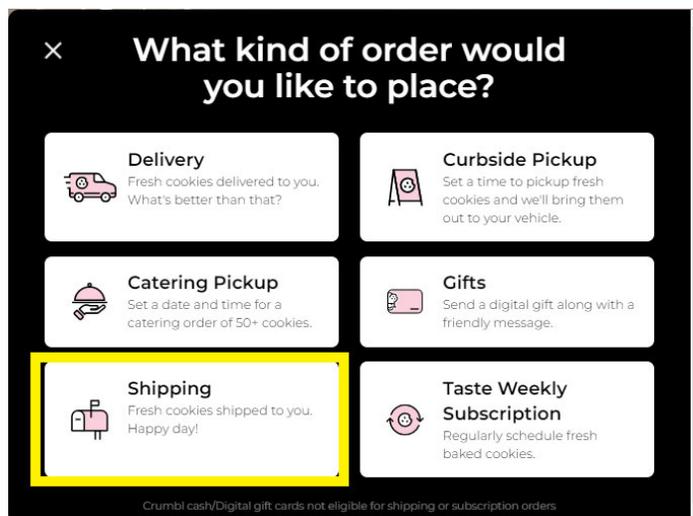
Email: XXXXX

Password: XXXXX

Step 3: On the top right corner click "ORDER NOW".



Step 4: After clicking the "order now" button, a pop-up box will appear. Please always select "SHIPPING".



Step 5: Fill it out using the information from the New contract Gifting. Look for the information of the client that you are sending the Crumbl cookies to and enter the client's info.

Please keep in mind for gifts before closing, it should be delivered to the current address of the client. (not the address they are purchasing)

When putting the address, you need to remove the "Apartment, unit, building, floor number" so you get the dropdown of the correct address, and just put any of these numbers ("Apartment, unit, building, floor number") to the 2nd street address..

Step 6: After selecting the correct address, put in the name of the clients. And hit 'Create Address'.

The screenshot shows a mobile application interface for confirming a new address. At the top, there is a dark header with the 'mapbox' logo on the left and 'YESLER TERRACE' on the right. Below the header, the main title is 'Confirm new address'. The form consists of four input fields, each with a label above it: 'RECIPIENT NAME' with a placeholder 'Enter first & last name', 'STREET ADDRESS' with a blacked-out placeholder, '2ND STREET ADDRESS' with a blacked-out placeholder, and 'CITY'. At the bottom of the form is a large black button with the text 'CREATE ADDRESS' in white.

Step 7: Always choose the 6-pack box.

Cookies

**6-Pack Box**
Choose your own large fresh gourmet cookie flavors.
\$29.99

**12-Pack Box**
Choose a dozen of our large fresh gourmet cookie flavors.
\$49.44

Step 8: Select random (assorted) cookies of your choice (6pcs).

×

Select your cookies

ALLERGY & NUTRITIONAL INFO >

 Molten Lava 0 0 1 140 cal*	 Lemon Glaze (Shipping) 0 0 1 110 cal*	 Gingersnap 0 0 1 120 cal*
 Peppermint Bark 0 0 1 160 cal*	 Sea Salt Toffee 0 0 1 130 cal*	 Red Velvet White Chip 0 0 1 150 cal*
 Milk Chocolate Chip 0 0 1 140 cal*	 Snickerdoodle 0 0 1 120 cal*	

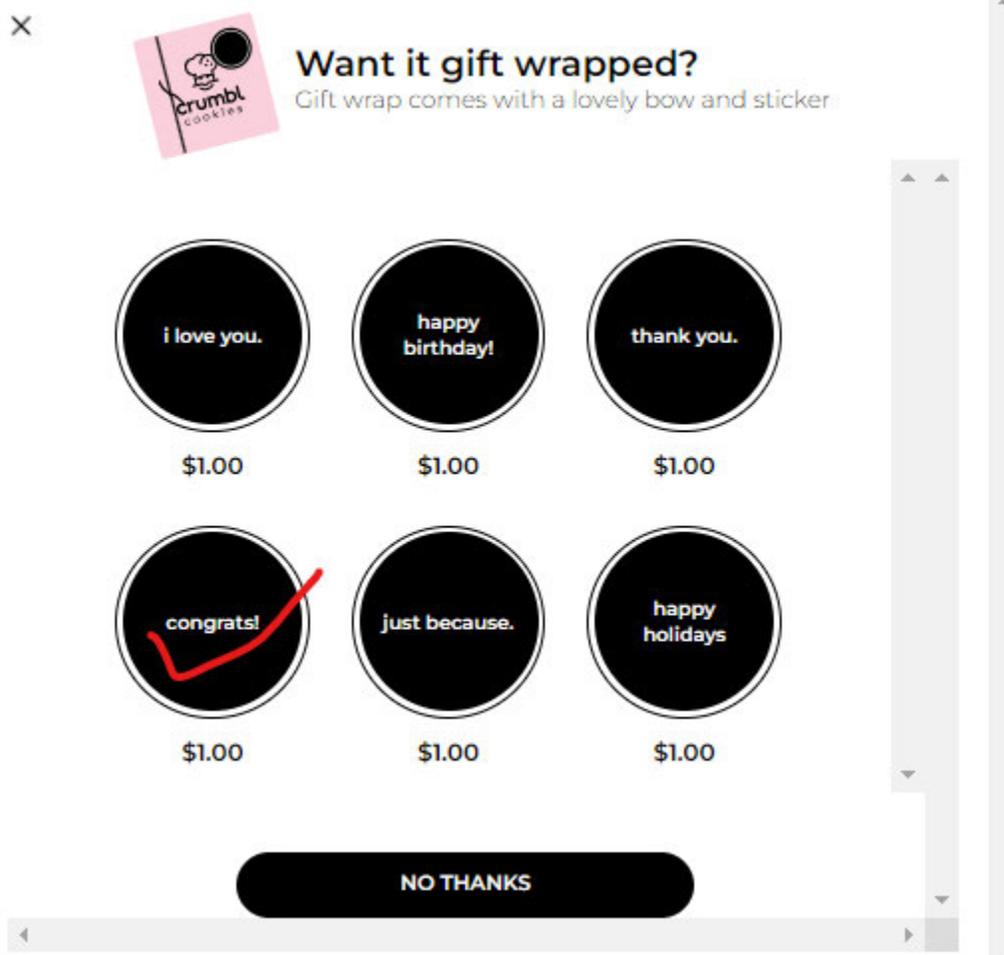
6 LEFT

Tap a cookie to remove from box.

Step 9: After selecting the cookies. Click "Add to Bag".



Step 10: Add 1 dollar for 'congrats'.



Step 11: go to check out.



Step 12: Hit continue.

< Review order

Where

[Redacted]

6-Pack Box \$29.99 ▲



1 x Molten Lava
1 x Lemon Glaze (Shipping)
1 x Gingersnap
1 x Red Velvet White Chip
1 x Snickerdoodle
1 x Milk Chocolate Chip
Gift wrap: congrats! (+\$1.00)

Subtotal: \$30.99

CONTINUE

Step 13: Don't forget to add the note.

Template:

Crumble Cookies note: You are about to close on your new home! Congrats! Here is to a sweet countdown to closing!

-*"NAME OF AGENT"* at The Collective Group

< Add a note?

Ordering for someone special? Add a note

[Text Area]

150

SKIP

Step 14: Hit continue.

< **Shipping**
Cookies are made fresh before shipping

Shipping Date (estimated)
Saturday, Dec 10

Delivery Date (estimated)
Monday, Dec 12

Address

[Redacted Address]

Shipping:	\$12.99
Subtotal:	\$30.99

CONTINUE

Step 15: For payment option please select the right option depending on the lead you are giving the gift to.

XXX's client: Card ending in XXXX

XXXX's client : Card ending in XXXX

For joint client (anyone from the team or joint between XXX and TXXX) Card ending in XXXX

< **Payment method**

VISA [Redacted] [Redacted]

VISA [Redacted] [Redacted]

AMEX [Redacted] [Redacted]

VISA [Redacted] [Redacted]

ADD NEW CARD

Step 16: After selecting the correct card, hit the 'place order'.

< **Payment**

Subtotal:	\$30.99
Shipping & Handling:	\$12.99
Taxes & Fees: ☺	\$0.91

TOTAL: \$44.89

Payment:

VISA ●●●● ●●●● ●●●● [REDACTED] >

Crumb! cash/Digital gift cards
not eligible for shipping orders

PLACE ORDER

◀ ▶

Step 17: After placing the order, on the [tracker](#), don't forget to change the dropdown from "not ordered" to "Ordered".

Answered NO ▾

Ordered

Ordered

Not Ordered

Answered NO

▾

Step 18: Put the order total amount in the Gifting Tracker under the client you are ordering the gift for. When putting the order total, right click on the field and select "insert note".

Note format:

** Order total amount*

** Card used and the last for digits*

