

SOP - How to Order Moving Boxes and RingDoorbell

Responsible: Jayson (Operations leader)

Accountable: Brennen & Tracy

Consulted: Agent

Informed: Tracy and Brennen / Agent

Step 1: Go to Gifting Tracker to get the information needed in ordering the gifts. Always remember that “Not ordered” tagging under Moving Boxes means the agent answered “YES” they wanted to send moving boxes to their clients, but the boxes 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.

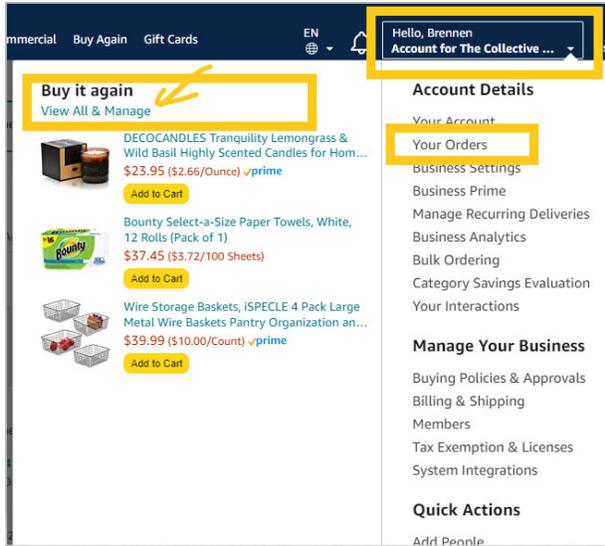
Moving boxes should be ordered 2 weeks before the day of closing.

Whose Client	Client	Closing Date	Moving Boxes	Cookies	Gifts	Status for Gifts	Notes	New Contract gifting	Inspection Over date
Patricia Hurst	Anshuman Goel	11/18/2022	Not Ordered	Ordered	Ring Doorbell	Ordered		Yes	10/26/2022

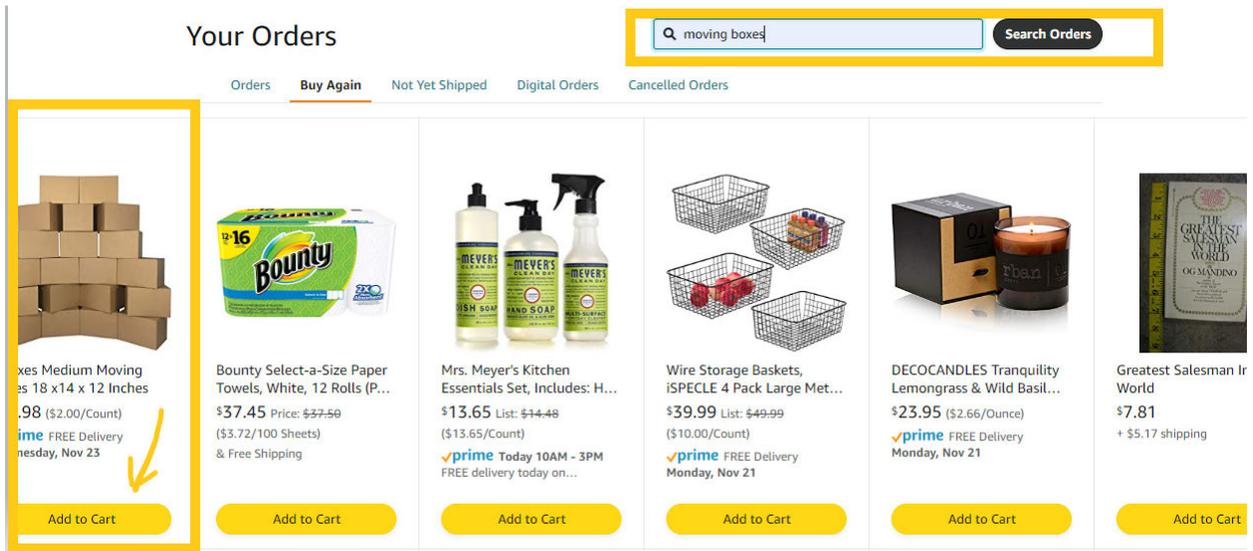
Step 2: If you haven't ordered the moving boxes, which means it's tagged as “Not ordered”, go to [Amazon.com](https://www.amazon.com).

Username:	XXX@
Password:	XX

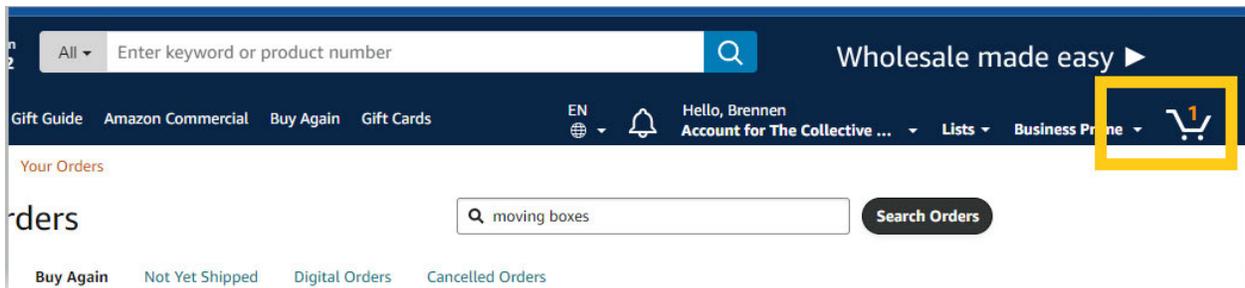
Step 3: Once you are logged in to Amazon, hover your mouse to “Account for The Collective Group” and you can either click “view all & manage” under ‘Buy it Again’ or go to “Your Orders”



Step 4: Type in "moving boxes" on the search bar. Once you see the moving boxes, click the "Add to cart" button.



Step 5: After adding it to cart, click the cart icon on the top right hand corner.



Step 6: Click "Proceed To Checkout"

The screenshot shows the Amazon Shopping Cart page. The main item is "UBoxes Medium Moving Boxes 18 x14 x 12 Inches" priced at \$39.98. The cart subtotal is \$39.98. A yellow box highlights the "Subtotal (1 item): \$39.98" and the "Proceed to checkout" button. Below the main item, there are related products, including "U-Haul Apartment Mov..." with a price of \$119.95.

Note: Always remember to check if the item you selected has a gifting option, these applies to other gifts you will be ordering in Amazon, it says "Gift option not available" you have to find different options for that item with gifting options. This is important, so our clients will know that it's from The Collective Group via a gift message.

This is a close-up of the product page for UBoxes Medium Moving Boxes. It shows the quantity selector set to "Qty: 1" and the seller information "Sold by: Amazon.com Services LLC". A large yellow box highlights the message "Gift options not available".

Step 7: Checkout page - Business Order information, leave it blank and just hit continue.

The screenshot shows the Amazon Checkout page for "Checkout (1 item)". The page is divided into sections: "1 Group" (The Collective Group), "2 Business order information" (with a PO number field), and "Order Summary". A yellow box highlights the "Continue" button in the "Business order information" section. The "Order Summary" shows a total of \$37.45.

Step 8: Checkoutpage - Choose shipping address. Click "Add new address".

3 Choose a shipping address

Keep operating hours up to date
If your hours ever change at an address, click **Edit delivery preferences** to update them.

Most recently used

Brennen Clouse [redacted] United States Edit address | Edit delivery preferences **Use this address**

Other addresses

Brennen Clouse [redacted] United States Edit address | Edit delivery preferences

Jayson Carbadilla [redacted] Edit

Tai & Tram Gong/Le [redacted] Edit address | Edit delivery preferences

Tom & Eric Tran/Frezell [redacted] United States Edit address | Edit delivery preferences

+ Add a new address

Step 9: After clicking the "add a new address" another form will pop out. Fill it out using the information from the New contract Gifting. Look for the information of the client that you are sending the boxes 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 correct field.

Enter a new shipping address

Add a new address

Save time. Autofill your current location. Autofill

Country/Region
United States

Full name (First and Last name)

Phone number Why?

Address

Apt, suite, unit, building, floor, etc.

City State ZIP Code
Seattle Washington

Add delivery instructions (optional)

Do we need additional instructions to find this address?
Provide details such as building description, a nearby landmark, or other navigation instructions

Do we need a security code or a call box number to access this building?

Weekend delivery
^ Do not deliver on weekends
I can receive packages on
 Saturday Sunday

Add address

Step 10: For payment option please select the right option depending on the lead you are giving the gift to.

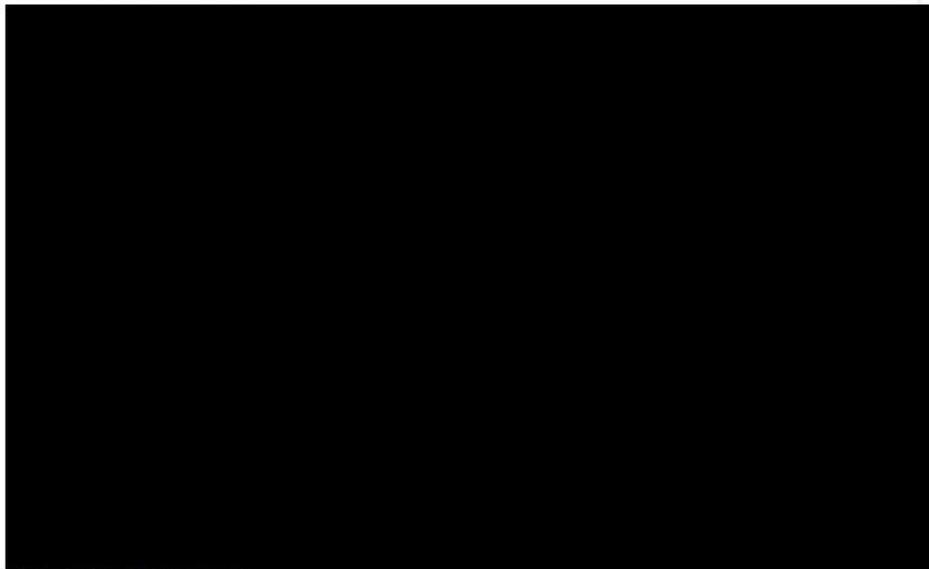
Brennen's client: Card ending in XXXX

Tracy's client : Card ending in XXXX

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

Then click the "Use this payment method"

4 Choose a payment method



Your available balance

Enter a gift card, voucher or promotional code

+

Other payment methods

- +  Add a business checking account
Use your US based business checking account.
[Learn more](#)
- +  Add a personal checking account
Use your US based personal checking account.
[Learn more](#)
- +  Apply for an Amazon Business Prime American Express Card > You can choose 5% Back or 90 Day Terms
at Amazon Business (U.S.) with eligible Prime membership. Terms and cap apply.

Step 11: For shipping options, please always choose the one with Free Shipping. After selecting the Free Shipping option and before hitting the "Place your order" button don't forget to take note of the order total.

v. 25, 2022

Choose a delivery option:

Wednesday, Nov. 23 - Friday, Nov. 25
FREE Shipping

Tuesday, Nov. 22
\$99.70 - Shipping

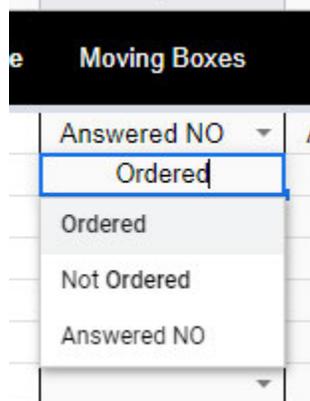
ore)

Place your order

Order total: \$41.29

By placing your order, you agree to the Amazon Business Accounts Terms and Conditions and Amazon's privacy notice.

Step12: On the [tracker](#), don't forget to change the dropdown from "not ordered" to "Ordered"



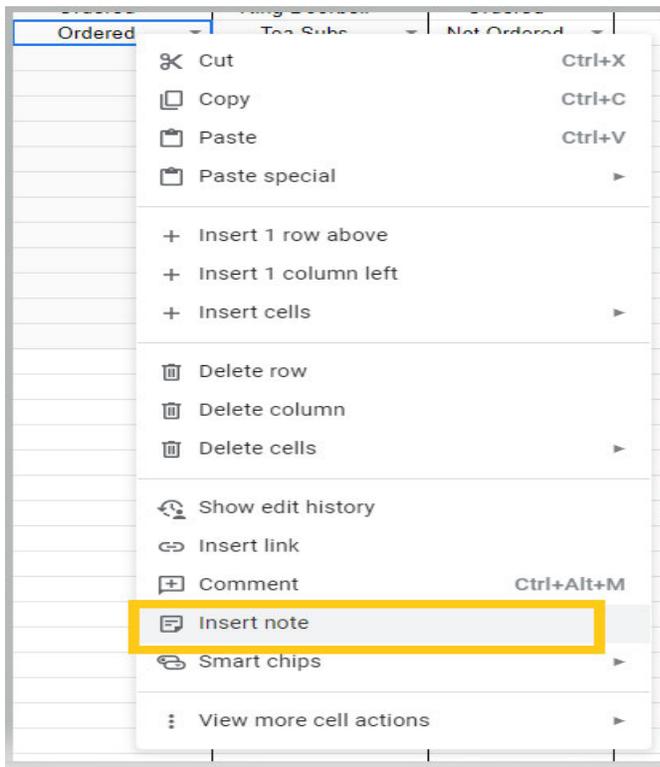
Step 13: Put the order total amount in the Gifting Tracker under the client you are ordering the gift for. When putting the order total, right click on the field and select "insert note".

Note format:



* Order total amount

* Card used and the last for digits



This SOP is applicable for both Moving Boxes and Ringdoorbell

Ring doorbell should be delivered to the office, just use the default address in Amazon.

Office address: XXXXX