

CLOSING DISTRIBUTOR CHECKLIST

COMPANY: _____ CLOSE APPROVED BY: _____
 ADDRESS: _____ CLOSE DATE: _____
 CITY, STATE, ZIP: _____
 PHONE: _____ FAX: _____
 OPEN DATE: _____ ACCT : _____

CORRECTIVE ACTION LETTER SENT: _____
REASON FOR CLOSING: _____

TERMS – () DAYS TO PROVIDE PROOF OF CONTRACT FOR PROJECTS – **CUT-OFF** ___/___/___
 () DAYS TO SUBMIT ORDERS (ONLY PROJECTS WITH CONT.) – **CUT-OFF** ___/___/___

- Prepare Cancellation Letter & get signed by P.Y.
- Fax, & Mail (Sig. Required) letter to Distributor Principal DATE: ___/___/___ INTLS_____
- Send letter in e-mail to REP, BDM & P.Y. w/ date mailed DATE: ___/___/___ INTLS_____
- E-mail: Order Entry, Accounting, Service & Sales w/ Terms DATE: ___/___/___ INTLS_____
- Add "Pop-Up" in CRM indicating that the dist. is closing & term dates (above)

On contract cut-off date, check with order entry – What contracts have been submitted?
 Order Dates? _____

On order cut-off date, check with order entry – What orders have been submitted? Ship Dates?

After Ship Dates indicated:

ACCOUNTING – Outstanding Balance: \$ _____ DATE: ___/___/___ INTLS_____
 When \$0.00 Balance, deactivate in GP DATE: ___/___/___ INTLS_____

ORDER ENTRY – Deactivate in: Door Order Program DATE: ___/___/___ INTLS_____

IT – Remove from: Dist. Locator Parts Order Site DATE: ___/___/___ INTLS_____
 Fax List & Group Partner Portal

FINAL – Confirm that account is inactive in CRM – Deactivate if not DATE: ___/___/___ INTLS_____
 Notify Order Entry, Accounting, Service & Sales – Dist. CLOSED DATE: ___/___/___ INTLS_____
 Notify BDM, REP & P.Y. – Dist. CLOSED DATE: ___/___/___ INTLS_____
 Have front desk remove from fax list DATE: ___/___/___ INTLS_____
 Remove from, Google maps, Rep Assig. Dist. DATE: ___/___/___ INTLS_____
 Combine paperwork and file in Closed Dist. File DATE: ___/___/___ INTLS_____