Total Door SYSTEMS
Global Leader in Integrated Access Technology™

Internal Checklist
Opening Distributor

NAME: [company] AGMT. DATE: _____

ADDRESS (mail): _____

ADDRESS (ship): _____

PHONE: _____ FAX: _____

PRINCIPAL: [principal name] EMAIL: [principal email]

PRIM. POC: [prim POC] EMAIL: [prim. POC email]

SALES REP: _____

GETTING

☐ Receive Credit App. from Dist. - Front Desk to begin processing ASAP
  May take up to 2wks - follow up with refs. regularly - if issues, involve Dist. & Rep Date _____/_____/_____

☐ Receive 100% completed Questionnaire from Rep. and notify rep or required training Date _____/_____/_____

☐ Questionnaire approval from JR – push to make sure rep has set up training dates Date _____/_____/_____

☐ Credit approved by COO - Intls. _____ Date _____/_____/_____

OPENING

☐ Send Distributor Agreement to Principal - cc Sales Rep
  Follow up(s) if not returned: Date _____/_____/_____

☐ Receive signed Agreement from Dist. - Give to P.Y. to review and sign Date _____/_____/_____

☐ Send to Principal (cc Rep & BDM.): ☐ Fully executed Agreement ☐ TDS Contact List
  ☐ Welcome Letter ☐ Before Your Total Door Order Date _____/_____/_____

☐ Send Marketing Material - (5) P.G. (25) C.B. (25) Know Your Code (1) Reatec Date _____/_____/_____

☐ Email office staff – heads up of new dist & folder will circulate immediately Date _____/_____/_____

SYSTEMS

☐ (Acctg.) Add to GP - GP Acct. #: _____ Date _____/_____/_____ Intls. _____

☐ (Order Entry) Add to Door & Part Order Programs Date _____/_____/_____ Intls. _____

☐ Assigned Dist. List for Rep and give to CCP Date _____/_____/_____ Intls. _____

☐ Add to Google Maps Update Then Save
  (Right click "TD DIST/SALES", save as, (Z:) Company Shared Folders, Distributors) Date _____/_____/_____ Intls. _____

☐ Complete company info in CRM - Include all docs. in "Notes" (agmt, crdt. app, qstnr, etc.) Date _____/_____/_____ Intls. _____

☐ Set DoorBuilder credit limit to 0. Date _____/_____/_____ Intls. _____

☐ (Front Desk) Add to Rapid Dial Fax / Group Fax & Shortcut List (Book) Date _____/_____/_____ Intls. _____

WELCOME CALL

☐ Notify Business Development Manager to make Welcome Call by _____ (2 weeks) Date _____/_____/_____

☐ Receive summary from BDM – (when coming to factory, when training) Date _____/_____/_____
☐ Training confirmation from rep Date _____/_____/_____
☐ Installation training confirmation Date _____/_____/_____
☐ Change credit limit in DoorBuilder Date _____/_____/_____

- Combine opening paperwork and create permanent Distributor File -

DIST NAME: [company]

Principal: [principal name], [principal email]

AP: _____ / **AP Email:** _____

Ref. Company & Contact Name:	1st Request		2nd Request	
	Date:	EM / Fax	Date:	EM / Fax
	3rd Request			
Fax #: Ph #:	Date:	EM / Fax	Notify AP of 3 attempts to references. CHECK WHEN COMPLETE COPY: Principal, Prim. POC and Sales Rep. ☐	
Email:	Additional Attempts:			
	Notes:			

Ref. Company & Contact Name:	1st Request		2nd Request	
	Date:	EM / Fax	Date:	EM / Fax
	3rd Request			
Fax #: Ph #:	Date:	EM / Fax	Notify AP of 3 attempts to references. CHECK WHEN COMPLETE COPY: Principal, Prim. POC and Sales Rep. ☐	
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