# LEADERS HOLDING CO.™
### Est. 1971

# Customer Owned Merchandise
# (CUSM-)

This procedure is used to track customer owned merchandise in our vast automated Distribution System. Writing a CUSM- ticket creates a barcode for the customer owned item(s) and allows them to be tracked anywhere in the company.

**When should a CUSM- ticket be used?**
- ✓ Guest <u>brings in</u> an item(s) to be serviced
- ✓ Guest <u>brings in</u> an item(s) to be repaired
- ✓ Guest <u>brings in</u> an item(s) to be inspected

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## Identify the product

**Bought from Leaders and Can Find the Sales Order**
- ✓ Print the Sales Order and go to "Write a Tracking Sales Order" later in this section.

**Did not Purchase from Leaders or Cannot Find the Original Sales Order**
- ✓ Gather as much of the following information as possible.
    i. Manufacturer
    ii. Type of item/Style Number (i.e. Chaise, Chair, End Table)
    iii. Frame Color
    iv. Brief description of the fabric.
- ✓ A picture if possible

## Write A Tracking Sales Order

Write a Sales Order for the guest that will serialize and track the customer owned product in the company.

1. Lookup the guest if they have bought from us before or create a guest record if they are not in the system.
2. From the View mode of the guest record click the **New Sale** button.
3. Complete the Sales Order.
    a. In the items field use the <u>Product Configurator</u> to create a CUSM item, including CUSM slings only.
    b. Write a separate line for each different item type
    c. Make sure the line item quantity matches the quantity of the type of item being dropped off
    d. Change the description of the item to give a detailed description of the
        i. Brand
        ii. Type of item
        iii. Color
        iv. Description of the fabric if applicable
    e. The price should be $0

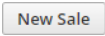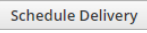| ITEM * | DESCRIPTION | QUANTITY | EACH | AMOUNT | ESTIMATED AVAILABILITY DATE | RELATED ORDER | FULFILL FROM | SPECIAL ORDER | COMMIT | INVENTORY DETAIL | TAX | SCHE DELI RECO |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| CUSM-CUSM : CUSM-CUSM,TROP,SWVTLT,07,25,19,CAS | Customer Owned Product, Tropitone Montreux Swivel Tilt Dining Chair, Aged Bronze Finish, White Sling, brought in for new slings | 1 | 0.00 | 0.00 | | | - Distribution Center | | Available Qty | | Yes | |
| | | | | | | | &lt;Type then tab&gt; | &lt;Type then tab&gt; | | | | &lt;Type tab&gt; |

Clear All Lines  Open Product Configurator

✓ Add   ✗ Cancel   Copy Previous   + Insert   🗑 Remove

## Item(s) Left at Store

    **1. Print one Sales Order for every item left**
        **a. Attach a copy of the Sales Order to every item**
2. Mark each area of concern on each item with red tape.
3. Attach a complete Inventory Control Form (ICF) to each item
    a. 2.120 Inventory Control Form
4. Place the items on your next available shuttle.  You will not be able to set a transfer date in NetSuite because the items do not show in the organization.  No additional paperwork or transfer order is needed at this time.
5. Once the items are received in the Distribution Center they will be labeled and received.
6. Open a solutions case if you have not already done so.

## Items Need To Be Picked Up By The Delivery Team

Write a Sales Order for the guest that will be able to be scheduled for fulfilment.  This scheduled fulfilment will send the delivery team to the location to pick up the items.

1. Lookup the guest if they have bought from us before or create a guest record if they are not in the system.
2. From the View mode of the guest record click the [ New Sale ] button.
3. Complete the Sales Order.
    a. In the items field write LEAD-Pickup
4. Save the sales order
5. Request approval on the sales order from a Sales Leadership Team Member or a member of the Solutions Team
    a. The approval will have to be requested because no deposit was taken.
6. Once the sales order is approved, press the [ Schedule Delivery ] from the View mode of the customer record and follow the instructions.
7. Add notes to the Delivery Memo tab indicating which items the driver is to pick up.
8. The guest will get an automatic email confirming the scheduled pick update
9. Open a solutions case if you have not already done so.

## Opening a Case

- Sometimes there is already a Solutions case and a CUSM sales order open when the customer drops off their furniture.  Always check first.  If there is already a case and a CUSM sales order in NetSuite, proceed to page 3.
- If there is no Solutions case opened, one will need to be created so that Solutions can track the merchandise.

**\*\*\*\* No matter what, every CUSM sales order written needs to have a Solutions Case opened to go with it.\*\*\*\***