

SPONSOR CHECKLIST

Primary School Supplies 228 West Page Street Sycamore, IL 60178 800-952-1119 Fax: 815-895-5717



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Welcome to School Tool Box™!! Thank you for volunteering to be a Sponsor and organize the program for your school. To make our program as easy as possible, we have put together this Sponsor Checklist. It will take you step-by-step through our program. Just follow the steps and check off each task as completed. It's as easy as 1, 2, 3 !!

Our program consists of three stages: Quoting, Ordering and Delivery/Distribution. A checklist for each stage is enclosed to help ensure that you are staying on track for your sale. Remember that our friendly Customer Relations Coordinators are always available to assist you at 800-952-1119. Please feel free to contact us with any questions or comments.

Online Options

Due to new Federal Regulations and for your protection, online ordering is the only method to allow parents to order by credit card.

Paper Order Form with Online Ordering Option

We will print the online information on your customized order forms for you to distribute to the parents. Parents will have the option to fill out and return the order form to the school or go online to purchase. We will process all the online orders for you. All online orders will be added to your submitted paper orders after the online store closes. All orders will receive the personalized student labels. We will also provide you with a master student name list to aid you in distribution. The order will be delivered to the school on your requested week of delivery.

All Online – School Delivery

Your school/organization can offer completely online ordering to your parents.

- No order forms to collect
- No money to collect

We will provide you with a colorful, customized flyer to distribute with the ordering instructions and school code. Parents will be instructed to go online to make their purchases. We will process all the orders for you. All orders will receive the personalized student labels. We will also provide you with a master student name list to aid you in distribution. The order will be delivered to the school on your requested week of delivery.

Go Green

If your school/organization would like to go green, we can provide you with a PDF flyer or order forms to send out in an email and to post electronically on your school web site.

Online Ordering Eligibility

Online ordering is available in 2011 for your School Tool Box™ program based on our policies outlined below:

- All Schools are eligible for online ordering beginning in 2011
- **IMPORTANT: Early Delivery schools** (May – Mid July delivery requests) Must have online ordering completed and site down 45 days prior to delivery request. (Example – July 1st delivery request must have online ordering completed and site down by May 15th) This is to enable us to have time for processing and packaging orders. **NOTE:** We need a 72 hour (not including weekends or holidays) lead time to get the store ready to go live prior to when your school wants to open the store to the parents. This allows for testing and ensuring that your site is fully functional and accurate.
- Your CRC will assist you in determining your Online Ordering window (open and close dates). Requested delivery week will be a minimum of six (6) weeks following the close of your school store. Add-on orders will not be accepted for Online Orders. Online Orders may not be cancelled after the school store has closed.

QUOTING STAGE

HOW TO GET STARTED

- | Date | Task |
|--------------------------|--|
| ✓ | Completed |
| <input type="checkbox"/> | _____ Send supply lists to Primary School Supplies/School Tool Box™ You can send them via fax (815-895-5717) or e-mail to your Sale Representative or directly to your assigned Customer Relation Coordinator (CRC). Please allow 3 business days to prepare your customized quotes. |
| <input type="checkbox"/> | _____ Refer to our Discount Schedule for details and important deadlines. |
| <input type="checkbox"/> | _____ Received quotes: Review and check the quotes to make sure they are correct. |
| <input type="checkbox"/> | _____ Make corrections on actual quotes, if needed, and fax or email back to your Sales Representative or directly to your CRC at Primary School Supplies/School Tool Box™ at 815-895-5717. We will revise them and email the corrected price quotes to you for approval. |
| <input type="checkbox"/> | _____ Receive revised quotes. Review and check the quotes to make sure they are correct. If further corrections are needed, repeat the previous step. |
| <input type="checkbox"/> | _____ After everything is correct, sign the bottom of each quote, complete and sign the Sponsor Agreement and Order Form Preparation Worksheet. Fax or email to your Sales Representative or directly to your CRC at 815-895-5717. Please note: Once the quotes are signed they are considered finalized – no further changes can be made to them. Due to new Federal Regulations and for your protection, online ordering is the only method to allow parents to order by credit card. |
| <input type="checkbox"/> | _____ Received confirmation that all paperwork was received and correct. |

Congratulations, you have successfully completed Stage One, now you can move on to

Stage Two: Promoting/Ordering.

PROMOTING/ORDERING STAGE

ORDER FORMS/ORDERING

Use this Check List to plan the deadlines for your Promoting/Ordering Stage. Reminder: To maximize your sales, put information (like order due date and pick up dates) on the school calendar, in the school newsletter, on the school's website, as well as in weekly take home folders. The Promoting/Ordering check list will contain additional instructions and helpful hints to walk you through each step.

✓ **Fill in dates and check when completed**

Order Form Due Date: _____ (When do you want parents to turn their order forms in to you? This deadline should be a least one week prior to the June 1st order due date to Primary School Supplies).

- _____ Refer to your Promotional Packet
- _____ Display Poster, send out optional Parent Coming Soon flyers. (Send out about two weeks prior to Order Forms)
- _____ Send out Order Forms (Send out about two to three weeks prior to order due date listed above. Keep an Order Form for each grade as a master copy in case you need additional forms. We will accept photocopies)
- _____ Send out an Order Due reminder to parents. (Use the template from the Promotional Packet, send them out about one week before the orders are due)
- _____ Collect orders and payments from school. (It is highly suggested to collect orders before school gets out for summer. Ask teacher and office personnel to check their desks to ensure that all orders have been turned in.) All online orders will be tallied by Primary School Supplies.
- _____ Complete Master Order Form. (On our website, www.schooltoolbox.com , you can download the Master Order Form. This is an Excel worksheet which contains 1) a form for compiling your student name list and payment information, 2) an interactive version of the Master Order Form, which performs the math calculations for you, 3) a Backpack Master Order Form, to enter the students name and choice of backpack and 4) instructions for completing the Master Order Form)
- _____ Deposit parent checks
- _____ Get school/organizational check – made payable to Primary School Supplies.
- _____ Mail order and payment (Mail payment and copy of the Master Order Form to Primary School Supplies, 228 W Page Street, Sycamore, IL 60178. All orders and payment are due on or before June 1st (unless prior arrangements have been approved). Email you organizer to orders@schooltoolbox.net.

Congratulations, you have successfully completed Stage Two, now you can move on to

Stage Three: Delivery/Distribution.

DELIVERY/DISTRIBUTION STAGE

INSTRUCTIONS/RETURNS/PAYMENT

Date

✓ Completed

_____ Expect Delivery the week of: _____

(Should be one to two weeks prior to distribution day. Choose a shipping week that begins with a Monday. We cannot guarantee a DAY of delivery. You will receive tracking details once your order is shipped so you can plan to have someone at the school to receive the shipment).

_____ Receive Shipment

(Check for damage, record on the bill of Lading – accept all boxes even the damaged ones. Count all boxes to ensure that you have received the complete order – refer to your Skid Packing List (included in Order Shipped email and in the Sponsor Packet). Report any discrepancies or damage right away to your Sales Representative or CRC at Primary School Supplies).

_____ Sort Shipment

(Locate the Sponsor Packet, a white box with bright neon stickers, included in the shipment. It contains important details about your order. DO NOT hand out any boxes until you have counted them all and verify the totals with your Master Order Form – copy included. Organize a team of volunteers to help move boxes to your final sorting/distribution site, and assist with sorting and counting).

_____ Distribute Boxes

(Use the student name list, included in your Sponsor Pack, to avoid distribution errors).

_____ Final Payments and returns of unsold consignment boxes due by September 30th.

(To be eligible for full credit, returns must be received by Primary School Supplies on or before September 30th).

Congratulations, you have successfully completed the School Tool Box™ program. We trust this has been a pleasant experience for you and look forward to doing business with you in the future. We are always striving for ways to improve our services and to provide the best customer service for you, our customers. If you have any comments or suggestions on how to improve our program, please send them to info@schooltoolbox.com or direct to your Sales Representative or CRC. We appreciate your feedback.

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