

Credit Accountability

Customer's Name:_____ **Customer's Phone:**_____

Items customer is interested in: _____

Daniel's Rating? _____ If not, why didn't they get approved? _____

Is a copy of the sales slip attached? If not, why not? _____

Did you send a dealmaker? If not, why not? _____

Did you IMPROVE the sale using the tips on the back of the dealmaker? YES or NO

Synchrony Decision? If Synchrony wasn't applied for, why not? _____

If approved how much? _____ Did you maximize the approval? YES or NO

If not, who did you T.O. to? _____

Sunbit Scan? If Sunbit wasn't scanned, why not? _____

If approved how much? _____ Did you maximize the approval? YES or NO

If not, who did you T.O. to? _____ What DP was required for Sunbit? _____

Progressive / Uown Leasing Application? If a leasing application wasn't ran, why not? _____

If denied by one provider, did you apply for the other? YES or NO

If approved, did you call for an increase? YES or NO

Did they purchase? YES or NO

If not, who did you T.O. to in order to close the sale? _____

Did you sell a Registry? YES or NO

If not, who did you T.O. to in order to Sell the Registry? _____

(You can sell a Registry on Daniel's, Synchrony, Sunbit (when leveraged on Daniel's), Uown, and if Progressive, on a separate Daniel's account).

Did you sign up New Customer for Recurring payments (Autopay)? YES or NO

If not, reason why?

Forgot to Offer: _____ No Bank Acct. /Debit Card _____ Customer Declined _____

Follow-up notes to contact and drive the customer back into the store: