

Appointment Packet

❖ The Acquisition Agent is required to create a packet for every appointment.
The 5 Factors MUST be complete before continuing on to the Appointment:

5 Factors:

1. **Contact Name:** _____ **Title:** _____
2. **Reason:** _____
3. **Facts:** (Circle all that apply) Invoice / Maintenance / Usage
4. **Credit Approval:** (Circle one) Yes / No
5. **Appointment Set:** (Circle one) Yes / No

Date: _____ **Time:** _____ **Agent Name:** _____
Company Name: _____

❖ Acquisition Deal

- Contact report with appointment date & time
- Acquisition Worksheet
- Profit and loss worksheet
- Current lease invoice
- Print out of current meter count
- Current usage/overage invoice (if separate)
- Picture of the Copier
- Specification sheet for current copier
- Credit approval sheet
- Secretary of State look up
(<http://businesssearch.sos.ca.gov/>)
- Lease agreement
- Business Card

❖ Flyer Deal / New

- Contact Report with appointment date & time
- Credit Application
- Credit Approval Sheet
- Secretary of State look up
(<http://businesssearch.sos.ca.gov/>)
- Business Card

❖ Shopping

- Contact Report with appointment date & time
- Proposals from the other vendors
- Specification Sheet for proposed machines
- All applicable documents listed under
“Acquisition Deal”
- Business Card

❖ After you make the packet, turn it into the inbox of the Acquisition Manager, immediately.