

WELCOME

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METRO

# INTRODUCTIONS

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- Name
- Location
- Position
- How long have you been with METRO?

# WHY METRO LIGHTING?

## Price Match Guarantee

METRO Lighting guarantees to match the lowest advertised price on any item we sell in the showroom. This includes internet pricing with the exception of discontinued, closeout, used and auction items on sites like eBay and Amazon.

## One Year In-Home Warranty

Metro Lighting's service department will come to your client's home and repair or replace any defective fixture within the 1<sup>st</sup> year of purchase as long as the home is located within 50 miles of our Brentwood showroom.

## Competitive Pricing

### Vendor Direct Program

Available for following vendors:

ACCESS – OVER \$100	ILLUMINATION EXP
AMERICAN	KOVACS
CASA/HUNTER	KICHLER
CRAFTMADE/JEREMIAH	MINKA/MINKA AIRE
CORBETT	METROPOLITAN
CRYSTORAMA	MODERN FORMS
DESIGNERS FOUNTAIN	MONTE CARLO
ELAN	PROGRESS
ELK	QUOIZEL
EMERSON	SAVOY HOUSE
ET2	SEAGULL
FANIMATION	SONNEMAN
FEISS	TECH
FREDERICK RAYMOND	TRANSGLOBE
LIGHTING HINKLEY	TROY
HUDSON VALLEY	WAC

IF:

- 1) We do not have the items in stock
- 2) The item requires standard UPS Ground shipping ONLY

# WHOLE HOUSE LIGHTING SELECTION PROCESS



# TABLE OF CONTENTS

- Setting Up Appointment – Slide 7
- Preparing For Appointment – Slide 8
- Completing Take-Off Sheet – Slide 9
- Meeting with Customer – Slide 11
- Filling Out Forms – Slide 12
- Shopping for Lighting – Slide 13
- Generating Quote & Picture Book – Slide 14
- Sending Final Paperwork to Builder – Slide 15
- Receiving Start Sheet – Slide 16
- Generating Whole House Ticket – Slide 18
- Whole House Ticket Examples – Slide 19-20
- Generating an Account Ticket – Slide 21
- Account Ticket Examples – Slide 22
- Checklist Require for Delivery – Slide 23
- Last Minute Orders – Slide 24
- Red Tag Displays – Slide 25
- Checking “No Ticket” & “Unpaid Balance” Spreadsheet – Slide 26
- Teamwork – Slide 27
- Ultimate Customer Service – Slide 28

# PRE-PLANNING

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# STEP I

## CUSTOMER CALLS FOR APPOINTMENT

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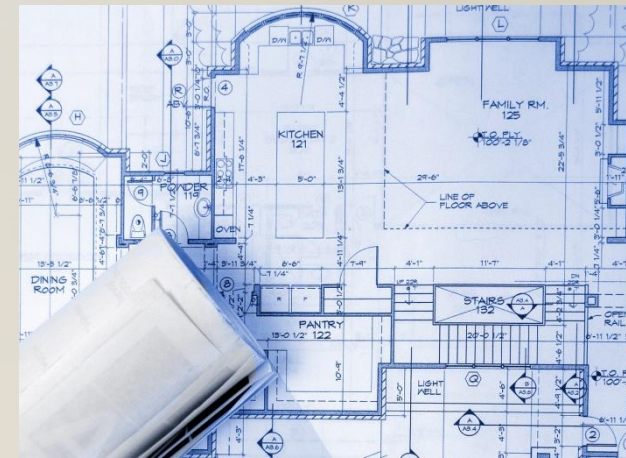
- Customer is assigned to salesperson for appointment
  - Customer should have salespersons name/store to make appointment. Ideally, the stores will have a list of who does what builders/subdivisions
  - Collect Appointment Info
    - TIME, DATE, & LOCATION
  - Collect Customer Info
    - Builder, Subdivision, Lot Number, Model, Allowance
    - Must emphasize to collect EMAIL & PHONE NUMBER when appointment is made
- Salesperson will send confirmation email to customer with:
  - Appointment TIME, DATE, & LOCATION
  - [Getting Started Video](#)
  - Materials on [Appointment Checklist](#)

# STEP 2

## BE PREPARED FOR APPOINTMENT!



- Call Builder to get the customer's house plan before appointment
  - This will be a **huge** help in planning for appointment if available
- Walk Through 360 Virtual video of model (when applicable)
  - This is available through several builders websites and will help with generating suggestions and upgrades
  - i.e. [McBride Aspen](#)





# STEP 3

## PRINT TAKE OFF SHEET

A) Find the Corresponding Take Off Sheet On Metro Employee Portal



B) Fill in all available details based on unique house plan received from the Builder

METRO Lighting						
Builder: McBrice	Customer Name:	_____				
Model: Ellington	Phone Number:	_____				
Lot & Subdivision: _____	Future Address:	_____				
	City/State/Zip:	_____				
	Email:	_____				
EXTERIOR						
ROOM	Fixture Type	Fixture #	QTY	Bulbs	Cost	To tal
Front Door	Standard	12345				
Garage	Standard	12346				
Rear Door	Standard	12347				
1ST FLOOR MISC						
ROOM	Fixture Type	Fixture #		Bulbs	Cost	To tal
Foyer	Standard	65432				
Master Hall	Option	12345				
Foyer Hall	Standard	98439				
Laundry Hall	Standard	65432				
Powder Room	Option	12345				
Lower Level Family	Option	65432				
Great Room	Standard	98439				
Laundry	Option	98439				
KITCHEN						
ROOM	Fixture Type	Fixture #		Bulbs	Cost	To tal
Kitchen Center	Standard	65432				
Kitchen Sink	Standard	98439				
Breakfast	Standard	12345				
Pantry	Option	65432				
Powder Hall	N/A	12346				
Dining	Standard	12347				
BEDROOMS						
ROOM	Fixture Type	Fixture #		Bulbs	Cost	To tal
Master Bedroom	Standard	65432				
Master Closet	Standard	65433				
Bedroom 2	Standard	65434				
Bedroom 2 Closet	Standard	65435				
Bedroom 3	Standard	65436				
Bedroom 3 Closet	Standard	65437				
Bedroom 4	Standard	65438				
Bedroom 4 Closet	Standard	65439				
BATHROOMS						
ROOM	Fixture Type	Fixture #		Bulbs	Cost	To tal
Master Vanity	Option	98439				
Master Commode	Option	65432				
2nd Floor Hall Bath	N/A	98461				
J&J Bath	Option	12345				
J&J Commode	Option	98461				
1st Floor Bathroom	Standard	98461				
2ND FLOOR MISC						
ROOM	Fixture Type	Fixture #		Bulbs	Cost	To tal
2nd Floor Stairs	Standard	65432				
2nd Floor Hall	Standard	98439				

# **CUSTOMER APPOINTMENT**

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# STEP 4

## MEET WITH CUSTOMER

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- Reserve designated “Work Station” in the showroom to conduct meeting
  - Work stations will be set up to project blueprints, wish lists, quotes, ect
- Walk through Take-Off Sheet w/Customer to fill in any missing information and confirm what is already filled out
  - This includes any upgrades and add-ons that may have been missing from the Builder’s Plan
- Go over any pictures, Pinterest boards or ideas the customer has in mind so you can pinpoint their design goals
  - Keep in mind: it is better to show them a few items aligned with what they are looking for rather than an abundance of choices

# STEP 5

## FILL OUT “SHEETS” WITH CUSTOMER

### SIGN OFF SHEET

- Walk Through Builder Sign Off Sheet with Customer & Initial/Sign
- Go through Builder Requirement Sheet
  - This will be created by Outside Sales Rep responsible for each individual builder

**METRO LIGHTING**  
www.metrolightingcenters.com

ARNOLD 636-464-7070    BRENTWOOD 314-963-8300    CAPE GIRARDEAU 573-339-0700  
CHESTERFIELD 636-449-1900    BALLWIN 636-256-3600    O'FALLON 636-379-0032

Date \_\_\_\_\_  
Builder \_\_\_\_\_  
Subdivision, Lot # \_\_\_\_\_

Dear \_\_\_\_\_

Congratulations on the purchase of your new home! Your builder has made an excellent decision in referring you to Metro Lighting. Lighting is truly an important part of your home and our lighting specialists look forward to assisting you in choosing the perfect lighting for your lifestyle. The following is a list of important guidelines for you to be aware of when choosing your lighting. Please read them carefully to ensure that you receive your merchandise as ordered and on time. After reading each guideline, please sign your initials on the line provided.

Metro Lighting does not install the lighting for your home; this is done by your builder's electrician. \_\_\_\_\_

All lighting orders must be placed no later than two weeks after your color selections are made or a minimum of six weeks prior to request for shipment to ensure complete and accurate delivery. If an order is placed within this time period, any backorders which may occur will be installed at no charge by Metro Lighting. Otherwise, installation of any backorder is the responsibility of the customer/builder. Any changes to the initial order after the deadline must be approved by the store manager. \_\_\_\_\_

Light bulbs (lamps) are not included in the fixture price. It is suggested that you order bulbs with fixtures to ensure proper type and wattage. \_\_\_\_\_

Items that are not normally stocked by Metro Lighting, i.e. SPECIAL ORDER ITEMS THAT ARE NON-REFUNDABLE, cannot be cancelled or returned once the order has been placed. \_\_\_\_\_

The balance due over your lighting allowance (as provided by your builder) must be paid in full at the time the order is placed. \_\_\_\_\_

Upon finalization, your order is processed immediately. Any changes or additions to your selections may be subject to a \$50 change order fee per item. This does not apply to SPECIAL ORDER ITEMS, WHICH ARE NON-REFUNDABLE. \_\_\_\_\_

Due to the time and difficulty of installing the following, additional installation charges may be assessed to you by your builder: ceiling fans, track lighting & rail lighting\*, recessed lighting, under cabinet lighting, cove lighting, lights that require additional assembly, crystal chandeliers, some fluorescent lights, ceiling medallions, mirror switches, mirrors with attached lights requiring a recessed electrical outlet, and vanities requiring plumbing changes. Please check with your builder or Metro Lighting specialist on the specific situations that relate to your home. \_\_\_\_\_

No warranty is extended on brass fixtures against tarnishing due to the natural oxidation process. No fixtures are returnable, under any circumstances, once they are installed. \_\_\_\_\_

If a fixture is damaged, please contact our service department at 314-963-7723.

Metro Lighting is committed to exceptional service before, during and after your purchase. We guarantee your satisfaction and are happy to be a part of your building plans. Thank you from the entire staff at Metro Lighting.

Sincerely,  
Bill Frieels  
President, Metro Lighting

Customer Signature \_\_\_\_\_ Date \_\_\_\_\_ Lighting Specialist \_\_\_\_\_ Date \_\_\_\_\_

\*Due to layout variances and installation difficulties, please check with your builder when ordering rail and/or cable lighting. If necessary, after closing, Metro Lighting can refer a qualified licensed electrician (customer's choice of union or non-union) for installation.

# STEP 6

## PICK OUT LIGHTING!!

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Here is your chance to give your Recommendations, Best Pricing & Upsell

Examples:

- 2 tier chandeliers when ceilings are 9' or vaulted
- Recess Cans in kitchen, great room & office
- Undercabinet lighting in kitchen
- Best value for price when comparing brands
  - Stock product vs Special orders



# STEP 7 GENERATE QUOTE & PICTURE BOOK

## EXAMPLE

## EXAMPLE

➤ Let customer know you will send **within 2 business days** with all their lighting choices to confirm before the order is placed

Always include bulbs underneath fixture on quote

### Metro Lighting

METRO LIGHTING - PROMENADE  
929 HANLEY INDUSTRIAL CT  
BRENTWOOD MO, 63144  
(314)963-8330

Quote #: M33468 Account #: 163 By: CHRISTY NALLEY Date: 7/25/17

Customer: PROMENADE SHOWROOM Job: PIN OAK MCBRIDE & SON CO  
929 HANLEY INDUSTRIAL CT  
BRENTWOOD, MO. 63144

Subdivision: ROCKWOOD RESERVE Owner's Name:  
Lot or Unit: 411 Street:  
Closing Date: 9/01/17 City/State:  
Model Plan: PIN OAK Zip:  
Allowance: \$ 500.00 Phone Number:  
Builder: MCBRIDE & SON CO.

LN	QTY	TYPE/ROOM	ITEM	PRICE	TOTAL
0	1	FOYER	783927-50686	\$ 320.37	\$ 320.37
1	9	FOYER	720720-24082	\$ 1.60	\$ 14.40
2	1	DINING	783927-40534	\$ 170.00	\$ 170.00
3	5	DINING	720720-24082	\$ 1.60	\$ 8.00
4	2	HALL	783927-60749	\$ 17.00	\$ 34.00
5	4	HALL	720720-24072	\$ 1.60	\$ 6.40
6	1	L.L. STAIR	783927-60749	\$ 17.00	\$ 17.00
7	2	L.L. STAIR	720720-24072	\$ 1.60	\$ 3.20
8	1	POWDER	783927-55124	\$ 68.00	\$ 68.00
9	2	POWDER	720720-24082	\$ 1.60	\$ 3.20
10	1	LAUNDRY	783927-81168	\$ 25.18	\$ 25.18
11	3	LAUNDRY	720720-24072	\$ 1.60	\$ 4.80
12	1	PANTRY	783927-02099	\$ 12.86	\$ 12.86
13	2	PANTRY	720720-24072	\$ 1.60	\$ 3.20
14	1	SINK	783927-60749	\$ 17.00	\$ 17.00
15	2	SINK	720720-24072	\$ 1.60	\$ 3.20
16	2	ISLAND	783927-11534	\$ 47.00	\$ 94.00
17	2	ISLAND/SINK	720720-24082	\$ 1.60	\$ 3.20
18	1	BREAKFAST	783927-30534	\$ 122.00	\$ 122.00
19	3	BREAKFAST	720720-24082	\$ 1.60	\$ 4.80

McBride & Son  
Presents:

411 Rockwood Reserve

Lighting Packages By:  
**METRO**  
LIGHTING

Representative: Christy Nalley  
christynalley@metroelectricsupply.com  
P: (314) 963-8330 F: (314) 962-7533

McBride & Son

Inventory Home

411 Rockwood Reserve



**Foyer**  
Kichler 43506OZ  
Olde Bronze  
Bulbs: (9) 100w Standard Base  
Width: 29.000"  
Height: 33.250"



**Dining**  
Kichler 43504OZ  
Olde Bronze  
Bulbs: (5) 100w  
Width: 24.500"  
Height: 23.250"



**Halls**  
Kichler 8112OZ (x2)  
Olde Bronze  
Bulbs: (2) 60w Standard Base  
Width: 13.500"  
Height: 6.000"

# STEP 8

## SEND FINAL PAPERWORK TO BUILDER

Send Final Quote and Builder Sign Off Sheet to Builder for Approval

Example

METRO LIGHTING  
929 HANLEY IND. CT  
BRENTWOOD, MO 63144  
314.963.7722 phone  
314.962.7533 fax  
Attn: Christy Nalley

Purchase Order Request

McBride & Son

Attention \_\_\_\_\_

Lot # \_\_\_\_\_

Subdivision \_\_\_\_\_

Customer \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Total Order Amount \_\_\_\_\_

Allowance Credit \_\_\_\_\_

Overage amount of \_\_\_\_\_ to be rolled into Customer's mortgage and billed to McBride & Son.

Customer \_\_\_\_\_ Date \_\_\_\_\_

Customer \_\_\_\_\_ Date \_\_\_\_\_

McBride & Son \_\_\_\_\_ Date \_\_\_\_\_

Metro Lighting \_\_\_\_\_ Date \_\_\_\_\_

# STEP 9

## RECEIVE BUILDER START SHEET

Click to page to view full start sheet\*

\*will vary by builder

- Compare the start sheet from the builder to your order
- Make sure the house is 100% complete and it matches your quote

**MCBRIDE HOMES**  
A SON OF DICK'S & DEWALT'S

Start Sheet  
Options by Category  
Printed Date: 6/27/2017

Community:	Arbors Of Rockwood Reserve	Closing Date:	N/A
Lot #/Address:	Lot #419C / 17994 Trailmark Court	Purchaser(s):	SRV19C-419C-0004 * Market Home *
Model:	MC118(2)301 - 3000plan		
Style/Garage:	American Colonial, Garage Left		
Builder:		Salesperson:	Kelle Neumann

Structural	Option	Selection	Style/Color	Qty	Revised
	Opt. Elevation	American Colonial			
	Opt. 1st Floor Ceiling				
Std.	1st Floor Interior Door Height	6'-8" Interior Door Height			
Opt.	08 Tall I.O.D. Operable Windows at First Floor				
Std.	Second Floor Interior Door Height	6'-8" Interior Door Height			
Std.	Second Floor Plan	Standard			
Std.	Garage Layout	3 Car Front Entry			
Opt.	Garage Handing	Garage Left			
Opt.	Stair Window	5050 Fixed Tempered			
Opt.	Kitchen Window	3030 Single			
Opt.	Breakfast Bay Window	2 Window Bay with Sliding Glass Door			
Opt.	Dining Room Ceiling Design	Tray			
Opt.	Great Room Bay Window	6 Window Bay			
Opt.	Master Bedroom Ceiling Design	Trichite Coffered			
Opt.	Master Bath Layout	Luxury Master Bath			
Std.	Finished Lower Level	Unfinished			
Std.	Basement Height	8' Pour			
Std.	Basement Selection	Ingrade			

Exterior	Option	Selection	Style/Color	Qty	Revised
Std.	Whole House Windows	Vinyl Single Hung	Low E White		
Opt.	Soffit and Fascia Selection	Level 2 - White Vinyl Soffit Aluminum Fascia and White Gutters			
ADD	Roof Shingle Type	Level 1 - 3 Tab	3 Tab Driftwood		6/19/2017
ADD	Siding Selection	Vinyl Horizontal Lap Siding - Double 10"	Vintage Wicker		6/19/2017
Opt.	Number of Stone Waterfalls			3	
Opt.	Address Stone				
ADD	Stone	Stone - Level 1	Harvest Mix Snapped		6/19/2017
CHANGE	Shutter Selection	Raised Panel	Musket Brown		6/19/2017
ADD	Brick	Brick - Level 1	King Chocolate Brown Antique		6/19/2017
Std.	Garage Door Height	7'			
Std.	Garage Door Finish	Level 1 - Factory Finish White			
CHANGE	Garage Door Glass Selection	Decorative Glass	Stockton		6/19/2017
Std.	Exterior Painted Trim	Level 1 - White			
Std.	Front Entry Door with 2 Side Lites	3068 Smooth Star 6 Panel Clear Glass - #210(2)304(2)S			
ADD	Entry Door Finish	Painted	Musket Brown		6/19/2017

Fireplaces	Option	Selection	Style/Color	Qty	Revised
Opt.	Great Room Cantilever Fireplace				

Viewed: 6/27/2017 4:46:40 PM Arbors Of Rockwood Reserve - Lot 419C Start Sheet - Page 1 of 12



# **GENERATING ORDER WITH METRO**

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# Step II - A

## GENERATING A WHOLE HOUSE TICKET

**Always** include the following in a whole house ticket header:

- **SHIP TO:**
  - LOT # / SUBDIVISION NAME
  - MODEL / BUILDER
  - FULL **PHYSICAL** ADDRESS\* & ZIP CODE: This is *typically* DIFFERENT from lot # and subdivision
    - Example:
      - Lot/Subdivision: 37 Sunny Hills Acres
      - Full Address: 1234 Sunny Side Drive, Ballwin 63450
- **OWNER INFORMATION:**
  - CUSTOMER NAME
  - CUSTOMER PHONE NUMBER
  - CUSTOMER EMAIL ADDRESS
  - JOB CONTACT: Job Super name and contact phone # is important because the driver may encounter issues while trying to make deliveries. Examples could include:
    - Gated communities with a keypad entrance
    - Remote location
    - Unknown area driver has not delivered to yet
    - House is locked up & need to get in to make delivery
- **SUBDIVISION INFORMATION:**
  - SUBDIVISION
  - LOT
  - UNIT (if applicable)
  - MODEL/PLAN

**\*\*\*Most builders have the full address on the start sheet of their new homes. If your builder is one who does not, please make a quick phone call to obtain it\*\*\***

# TICKET EXAMPLES

## WHOLE HOUSE

### Whole House Ticket Entry

### Whole House Ticket Header

TDJ  
File Edit View Help

LIGHTING TICKET ENTRY

BRANCH #: 8 CUSTOMER #: 83 OR TICKET #: L00437-00  
B ST. PETERS SHOWROOM S 98 WINGHAVEN  
I ACCT#83 H HERITAGE JONES CO.  
I 10 HOOD DR I 1234 WINGFIELD COURT  
L ST. PETERS, MO 63376 P ST. CHARLES MO 63249

(W)AREHOUSE/(D)IRECT: W SHIP VIA: DELIVERY SLSPN #2: 496 SLSPN #1: 1  
CUSTOMER P/O#: ORDER DATE: 121015  
JOB NAME: COL PRICE: 2 BLNKT EXCEP: .0 CD CODE: 2  
STATE TAX: 8 COUNTY TAX: CITY TAX: OTHER TAX: EXTENDED TICKET: Y  
OPERATOR: LZ DATE WANTED: 20116 SHIP FROM: 5 ACCEPT BACKORDER: Y

BUILDER'S # : 50477 NAME: JONES CO. CLOSING DATE: 21516  
ALLOWANCE: 500.00

OWNER:  
HERMAN WINSLOW PH 636-452-7813

JOB CONTACT:  
BOB FINISH PH 636-555-5959

SUBDIV: WINGHAVEN LOT: 98 UNIT: MODEL/PLAN: HERITAGE  
LOCATED:

CORRECT? (Y/N)

Ready CAPS NUM OVR RD

TDJ  
File Edit View Help

BRANCH #: 8 CUSTOMER #: 83 TICKET #: L00437-00 OVER: 3 OPEN ( ENTERING )  
SHPD FRM: 5 WHOLE HOUSE warehouse

B ST. PETERS SHOWROOM S 98 WINGHAVEN  
I ACCT#83 H HERITAGE JONES CO.  
I 10 HOOD DR I 1234 WINGFIELD COURT  
L ST. PETERS, MO 63376 P ST. CHARLES MO 63249

SLSP: 1:496 EBY: LZ CBY: PBY: SBY: ORDR: 12/10/15 WANT: 02/01/16 CHGD:  
CLOSE: 02/15/16 DLVR: SHPD: INVD:

B/O: Y EXT TKT: Y SHIP VIA: DELIVERY CPO:  
TAX CDS: 8 / / / CPR: 2 CDC: 2 BE: .0 PENDING: CPY: 0

BUILDER: 50477 JONES CO. SUB-TOT: 329.54  
D HERMAN WINSLOW PH: 636-452-7813 TXBL SC: .00  
TAX: 26.03  
C BOB FINISH PH: 636-555-5959 FREIGHT: .00  
S WINGHAVEN LOT: 98 SPL CHG: .00  
MDL/PLN: HERITAGE UNIT: -----  
LOCATED: 355.57  
PYMNT: .00  
ALLOW: 500.00

(D)ETAIL, (W)/COMMENT, (N)EXT, PRE(V), (S)EARCH, EN(T)RY, RET(U)RN, (E)ND

Ready CAPS NUM OVR RD

# TICKET EXAMPLES WHOLE HOUSE

**PLEASE NOTE: TICKET MUST  
PRINTED FOR THE ORDER TO BE  
PROCESSED**

Whole House Shipper

ORIGINAL SHIPPER

## METRO

### ELECTRIC-LIGHTING

METRO LIGHTING - PROMENADE  
929 HANLEY INDUSTRIAL CT  
BRENTWOOD  
FOR INQUIRIES CALL: (314)963-8330

\*\*\*\*\*

CUSTOMER # 163

TICKET # M30854-00 5

DATE: 6/07/17

**SOLD TO:**  
PROMENADE SHOWROOM  
ACCT 163  
929 HANLEY INDUSTRIAL CT  
BRENTWOOD, MO. 63144

**SHIP TO:**  
30 CHESTNUT CREEK  
HILLTOP JONES CO.  
TANGLEWOOD - NICKEL  
315 CHESTNUT CREEK CIR MO. 63368

**SUBDIVISION INFO:**  
SUBDIVISION: CHESTNUT CREEK  
LOT: 30 UNIT:  
CLOSING DATE: 71517  
MODEL/PLAN: HILLTOP  
ALLOWANCE: 1015.54

**OWNER INFO:**  
OWNER'S NAME: BOB & SUE SMITH  
PHONE: 314-123-4567  
EMAIL: BOBANDSUESMITH@HOTMAIL.COM  
JOB CONTACT: FRANK SUPER 314-555-5555  
BUILDER: 50477 JONES CO.

Customer P.O.#	AM	PM	Salesperson	Entered By
SCHEDULE A-\$1015.54			1/393	CN 11:03

Line No.	QTY Ordered	QTY Shipped	8	0	Description	Price	U/M	Extended
0	3	3	Y		KICH 49255BK OP COACH			E
1	3	3	Y		TCP 801014 27K CFL 14W COACH			E
2	1	0	Y		KICH 9611BK REAR MQ			E
3	1	0	Y		TCP 801014 27K CFL 14W REAR			E
4	1	1	Y		KICH 42900NI OP FOYER			E
5	2	2	Y		TCP 801014 27K CFL 14W FOYER			E
6	1	0	Y		KICH 42906NI OP DINING			E
7	5	0	Y		TCP 801014 27K CFL 14W DINING			E
8	1	1	Y		KICH 8112NI CQ HALL			E
9	2	2	Y		TCP 801014 27K CFL 14W HALL			E
10	1	1	Y		KICH 45902NI OP POWDER			E
11	2	2	Y		TCP 801014 27K CFL 14W POWDER			E

**Offering a Complete Line Of Residential, Commercial & Industrial Electrical & Lighting Supplies**

<p><b>PRICE GUARANTEE</b></p> <p>Metro Lighting guarantees our prices to meet or beat any competitor, including online competitors, on any like product.</p>	<p><b>SERVICES</b></p> <p>Layout &amp; Design In-Home Consultation Energy Audits Recycling Lamp &amp; Fixture Repair Customization</p>	<p><b>ONE YEAR IN-HOME WARRANTY</b></p> <p>In addition to the manufacturers' warranty, Metro Lighting guarantees any lighting or ceiling fan product for one full year. If anything goes wrong with the product for any reason, we will fix it or replace it at no charge to you!</p>
--	--	---

Full PHYSICAL address & Zip

Customer Email

Job Contact

# Step 11 - B

## GENERATING AN ACCOUNT TICKET

***In account quote entry you do not have the same parameters as in whole house quote entry, attempt to put as much pertinent information needed for all parties***

### **SHIP TO:**

LOT # / SUBDIVISION NAME

MODEL / BUILDER

FULL **PHYSICAL** ADDRESS & ZIP CODE: In this example, they are the same

JOB CONTACT: Job Super name and contact phone # is important for smaller builders / custom homes / remodels because the driver may encounter issues while trying to make deliveries. Examples could include:

Gated communities with a keypad entrance

Remote location

Unknown area driver has not delivered to yet

House is locked up & need to get in to make delivery

***\*\*\*Most builders have the full address on the start sheet of their new homes. If your builder is one who does not, please make a quick phone call to obtain it\*\*\****

# TICKET EXAMPLES ACCOUNT TICKET

Lighting Shipper

## Lighting Ticket Entry

ORIGINAL SHIPPER

# METRO ELECTRIC-LIGHTING

METRO LIGHTING - PROMENADE  
929 HANLEY INDUSTRIAL CT  
BRENTWOOD  
FOR INQUIRIES CALL: (314)963-8330

*****
CUSTOMER # 3036
TICKET # M29939-00 5
DATE: 5/22/17

**SOLD TO:**  
AKJ CO TEGETHOFF HOMES  
21 FOX MEADOWS  
ST. LOUIS, MO 63127

**SHIP TO:**  
29 MEADOWBROOK CC  
BALLWIN MO 63011  
SCHULTZ RESIDENCE  
DAVID W GRASSER 856-3817

Full PHYSICAL  
address & Zip

Job Contact

Customer P.O.#	AM	PM	Order By
	DELIVERY	93/456	KR 11:29

Line No	QTY Ordered	QTY Shipped	S O	Description	Price	U/M	Extended
0	2	2	Y	RAB STL110HW STEALTH WHITE 100A FL FLOODS		E	
1	4	4	Y	HALCO PAR38FL17/830W/LED FLOODS		E	
2	8	8	Y	COL LAV440MLEDJ 120/277LED WRAP 4K GARAGE		E	
REQUESTED 89 TO BE ORDERED							
5	8	8	Y	VERBATIM 99094 R20 3K 50CLM 4" CAN BULBS		E	
6	18	18	Y	TCP LED18A21D0D30K 18W OMNI DIM 30K LL BULBS		E	
7	1	1	Y	RAB LOS 2500/120 RND MOTION SENSOR OC SENSOR		E	
REQUESTED 1 FROM BRANCH 4							
9	1	1	Y	LUTRON DVCL-153-PHWH DIVA CFL/LED M BATH CHANDELIER		E	
10	2	2	Y	LUTRON DVCL-153-PHWH DIVA CFL/LED POWDER RM DIMMERS		E	
11	1	1	Y	LUTRON DVCL-153-PHWH DIVA CFL/LED M BED CHANDELIER		E	
12	1	1	Y	LUTRON DVCL-153-PHWH DIVA CFL/LED M BED CANS DIMMER		E	
13	2	2	Y	LUTRON DVCL-153-PHWH DIVA CFL/LED MAIN HALL SCONCES		E	
14	1	1	Y	LUTRON DVCL-153-PHWH DIVA CFL/LED FOYER DIMMER		E	
15	1	1	Y	LUTRON DVCL-153-PHWH DIVA CFL/LED STUDY DIMMER		E	

### Offering a Complete Line Of Residential, Commercial & Industrial Electrical & Lighting Supplies

#### PRICE GUARANTEE

Metro Lighting guarantees our prices to meet or beat any competitor, including online competitors, on any like product.

#### SERVICES

Layout & Design  
In-Home Consultation  
Energy Audits  
Recycling  
Lamp & Fixture Repair  
Customization

#### ONE YEAR IN-HOME WARRANTY

In addition to the manufacturers' warranty, Metro Lighting guarantees any lighting or ceiling fan product for one full year. If anything goes wrong with the product for any reason, we will fix it or replace it at no charge to you!

### QUOTATION ENTRY (LIGHTING - ACCOUNT)

BRANCH #: 16 CUSTOMER #: 3036 QUOTE #: M29939  
 B AKJ CO TEGETHOFF HOMES S 29 MEADOWBROOK CC (JOB NAME)  
 I H BALLWIN MO 63011  
 L 21 FOX MEADOWS I SCHULTZ RESIDENCE  
 L ST LOUIS MO 63127 P DAVIS W GRASSER 856-3817

SLSPN #: 456 (W)AREHOUSE/(D)IRECT: W DATE: 52217 CHANGED: BY:  
 TIE LAMPS: N STANDING QUOTE: N TAX CODE: 16 COL PR: 3 BEX: .0  
 MARGIN: 40.00 LAMP MARGIN: 40.00 VER: 0

Correct? (Y/N)

# Step 12

## CHECKLIST REQUIRED FOR DELIVERY



- Attempt to always provide a **2 week\*** notice for all home deliveries with delivery department
- Ensure all ticket header information is accurate & complete with all necessary contact information
- Double check all locations and items to make sure they are correct & proper bulbs are sold
- Obtain proper PO's from builder
  - Verify proper PO is noted on ticket
    - Builders which require a PO:
      - Consort Homes- 24012
      - Fischer & Frichtel- 34993
      - Hughes Custom Homes- 46306
      - Innsbrook- 45764
      - Jones Co- 50477
      - Lombardo Homes- 45996
      - McBride & Sons- 59076
      - Meadowbrook Dev-59761
      - Payne Family Homes- 69700
      - Rowles Co- 76325
  - Verify PO's match allowance on ticket
- Resolve all outstanding balances with the customer
  - Any ticket with a balance due **WILL NOT BE DELIVERED**

# \*LIMITING LAST MINUTE ORDERS

## Orders need to be submitted 2 WEEKS in advance

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- The Whole House office pulls orders for delivery 10 business days out from the delivery date
  - If today is the 1<sup>st</sup> of the month, they are pulling orders today for the 15<sup>th</sup>
- Please make sure that, to your best ability, your ticket is generated, in full, with matching PO's, and balances paid prior to that 10 day period
  - This means that your GOAL is to have the ticket complete and all final changes made at least 6 weeks prior to the estimated closing date
    - This ensures that any necessary last minute changes are given ample time to arrive. Please make every effort to LIMIT these changes
- Make sure the items which are not in stock have a PO written & tied to them
  - Contact the purchasing department for any that need to be done & have not yet
- Please make sure that when you find an item that shows in stock but cannot be found, add it to cycle counts!
  - When viewing item in stock status, press Y to send to Cycle Counts
  - Cycle Counts are done almost every day and will help you in the long run when your orders are pulled!



# Step 13

## RED TAG DISPLAYS

➤ Branches: If you have sold a red tag display fixture from your store, it is **YOUR** responsibility to see that the fixture:

- A. Gets pulled down off of the ceiling
- B. Checked for adequate parts, including **GROUND WIRE!**
- C. **CLEANING IT**
- D. Undressing crystals
- E. Wrapping it **PROPERLY**
- F. Sending it down to Brentwood for delivery with other lights

\*\*\*If you have warehouse staff, feel free to ask for assistance getting down & cleaning it. However, you **MUST** check it yourself prior to sending to Brentwood\*\*\*

➤ Brentwood location: Alert the Warehouse. The warehouse staff will help you to take the fixture down from display. Lainey will be responsible for seeing that the fixture:

- A. Gets pulled down off of the ceiling
- B. Ensuring that the selling salesperson has **THEMSELVES** checked for:
  - Adequate parts
  - **GROUND WIRE!**
  - Nothing broken are missing
- C. **CLEANING IT**
- D. Undressing crystals
- E. Wrapping it **PROPERLY**
- F. Getting it to the whole house office for staging with order

\*\*\*It is the salesperson's responsibility for the fixture. If Lainey is told the fixture is ok to send out, and the customer/electrician finds otherwise, it is the salesperson's responsibility to attend to the matter-You made a promise to your customer that it would work\*\*\*

# Step 14


## CHECK “NO TICKET” & “UNPAID BALANCE” SPREADSHEETS

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The “Deliveries with No Ticket” / “Need PO or Balance Paid” spreadsheet should NOT NEED TO EXIST: This is a list of orders which have been scheduled for delivery, yet have no ticket written in the computer, or still need matching PO's or a balance due from customer

- When you have a customer who still needs to select their lights, get ‘em in here!
  - Customers push off coming in on a regular basis, keep on them and make sure they don't forget about you
- Make sure you completed & printed the ticket when generating
- Follow up with any unpaid balances & Pos

### **Outside Sales/Managers: you receive this list daily**

- Please make sure you utilize it & send it to your salespeople who may need it as well
  - Follow up to make sure these orders for your branch/customers have been resolved
- 

# TEAMWORK



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- Please make sure to keep the following in mind! Teamwork!
    - A. When new subdivisions begin, please make sure to send the delivery department the information needed
    - B. Inform Jason and Chris if phone numbers change, electricians or job superintendents are relocated
    - C. If your builder doesn't have a website and/or does frequent off-site custom homes, make sure they know where to send their drivers, any extra information you can provide is always appreciated
    - D. If a delivery mistake is made, let them know ASAP so they can rectify the error
    - E. Give notice! Emergencies can often happen, work **TOGETHER** with your delivery department to deliver

# STEP 15

## YOU AREN'T FINISHED YET! REMEMBER USC

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### Ultimate Customer Service

- Follow Up On:
  - Delivery of Products
  - Any Customer Issues
  - Back Ordered Product
  - Customer Satisfaction



# SUMMARY

- Set up appointment & collect customer information
- Prepare for appointment by going through house plans & filling out take-off sheet
- Meet with customer to choose lighting
- Generate Quote & Picture Book
- Send final paperwork to builder
- Receive & cross-check builder start sheet
- Generate order for METRO warehouse for delivery
- FOLLOW UP: On unpaid balances, open tickets, delivery & customer issues

**THANK YOU!!**