ACME ROOF PROS
ROOFING & STORM RESTORATION · ANYTOWN, ST

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COMMISSION CHECK LIST

Completed by the sales consultant and verified by the manager. Goes in with your Consultant Commission Request (ACME-REP-205).

CUSTOMER / JOB NAME

TODAY'S DATE

SALES CONSULTANT NAME

VERIFYING MANAGER

CRM

☐	Create contact in the CRM FIRST
☐	Contact has a valid email in the CRM
☐	Scope or cash proposal is in the CRM
☐	Measurements are in the CRM — Insurance, RoofScope, or RoofR
☐	Supply list is in the CRM — Insurance, RoofR, or hand typed

JOB PHOTOS (PHOTO APP)

☐	The photo app "Project" name matches and is synched with the the CRM contact
☐	Every defect on driveway, siding, windows, fences, doors, etc. has photos
☐	All full sides of the roof and all roof accessories have photos
☐	All spots and interior damage have photos
☐	A good "before" work-style photo of the front has been taken

CORRESPONDENCE DOCUMENTATION

☐	All phone calls have notes in the CRM, including calls from a personal number
☐	Any texts from a personal phone have been uploaded to the CRM
☐	Any measurements, quotes, bids, and emails are in the CRM
☐	Any strange in-person activity or conversations are noted in the CRM
☐	Any special customer requests are in the CRM and a manager is looped in

CONTRACT

☐	All interior work is specified thoroughly with photos & measurements
☐	All exterior work is specified thoroughly with photos & measurements
☐	All promises made are approved by Admin, noted in the CRM, and written in the contract. No handshake promises have been made.
☐	"Direction to Pay" has been signed and turned in
☐	Contract is filled out properly and in the CRM

DO NOT CHECK OFF ITEMS THAT ARE NOT COMPLETE

These are MANDATORY, not discretionary. They are designed to protect You, Us, and the Customer. If these items are not complete, a pay request is premature and will be denied. And just because it's not on this list doesn't mean it's not required; common sense is assumed.

SALES CONSULTANT SIGNATURE

VERIFYING MANAGER SIGNATURE