|  |  |  |
| --- | --- | --- |
| **Name:** | **E-mail:** | |
| **Address:** | **City/Zip:** | |
| **Salesperson:** | **Date:** | |
| **Phone:** | **Best Times:** | |
| **Room Type:** | **Dimensions:** | |
| **Desired Look:** | **Preferred Colors:** | |
| **How Used?** | **Focal Point:** | |
| **Pref Fabrics:** | **Lighting:** | |
| **Children:** | **Flooring:** | |
| **Seating For:** | **Walls:** | |
| **Pets or Other Needs:** | | **Birthday:** |

**ROOM SKETCH** (Include all architectural elements)

**FURNITURE SELECTIONS**

**FOLLOW UP ACTION PLAN**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| STYLE # | DESCRIPTION -COVER | MEASUREMENTS | QTY. | PRICE | PRICE | PROMO  DATE |
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|  |  |  |  |  |  |  |
|  | | | | DELIVERY |  |  |
| SUB TOTAL |  |  |
| SALES TAX |  |  |
| TOTAL |  |  |

|  |  |  |
| --- | --- | --- |
| **Next Action** | **Date/Time** | **Result** |
|  |  |  |
|  |  |  |
|  |  |  |

**Advertising Products Steps / Reasons**

\_\_Be Back \_\_ Uph.-Sofa/Love/Sect. \_\_1 Greeting

\_\_Repeat Customer \_\_ Uph.-Recl/Chair/Ott \_\_2 Needs Analysis

\_\_Print Media \_\_ Leath-Sofa \_\_3 Product Comparison

\_\_Sign/Drive By \_\_ Leath-Rec/Ch/Ott \_\_4 Sketched The Room

\_\_Customer Referral \_\_ Occasional Tables \_\_5 Presentation

\_\_Television \_\_ Casual Dining \_\_6 Demonstration

\_\_Radio \_\_ Formal Dining \_\_7 Asked For Order

\_\_Online \_\_ Youth \_\_8 Made Be Back Appt

\_\_Internet \_\_ Master Bedroom

\_\_Magazine Ad \_\_ Bedding

\_\_Exchange \_\_ Home Office

\_\_Yellow Pages \_\_ Protection Plan

\_\_ Billboard \_\_ Wall Units

\_\_Didn’t Ask

**Additional Comments:**