Personal Shopper

- Personal Shopper User Guide
- Selecting Linens and Kitchenware
- How to Pick Mattresses, Bed Frames & Platform Beds
- Personal Shopper- Client Shopping Flow

Personal Shopper User Guide

PERSONAL SHOPPER

Fresh Start Furniture Bank's mission is to help restore hope, dignity, and stability in our community by recycling donated furniture and housewares, for free, to people in need. Our personal shoppers have the most contact with our clients and, therefore, play an important role in reinforcing our mission statement. The personal shopper is the lead individual who is responsible for understanding the needs of the client and assisting the client in selecting furniture and other household items. It is imperative that the shoppers always keep in mind the dignity of our clients and ensure that they are treated with respect and leave their shopping experience feeling like they have been given a fresh start for a hopeful future.

If at any point you are having difficulties in your interactions with your client and feel that you need support, please ask the front desk personnel.

Furniture Selection Overview

Furniture is selected based on the supply that Fresh Start currently has, what the client needs, the space restrictions in the client's dwelling, and transport restrictions. When showing furniture to a client, the personal shopper should get an understanding from the client regarding the size of their dwelling and any concerns about moving the furniture (e.g. availability of help to carry the items, what floor the apartment is on, tight hallways, stairwells, elevators, or door openings, etc.). The client's transport vehicle(s) also dictates the amount and size of furniture chosen. If the vehicle capacity is in question, feel free to ask the lead in-store mover to have someone measure the vehicle so you better understand your space limitations.

The client selects the furniture based on their style and color choices; it is not appropriate for the shopper to select the furniture for the client. However, if the client finds the shopping process overwhelming and/or is experiencing extreme indecision or anxiety over the process, the personal shopper may help the client to come to a decision.

The inventory of furniture is constantly changing. As long as there are two pieces of furniture in any given category (e.g. kitchen tables), the client must choose between the two pieces if they are interested in that furniture category. *They cannot return for a second visit in hopes of a different selection on their follow-up visit.*

Meeting the Client and Preparing to Shop

Please refer to the laminated “Flow for Check In & Starting to Shop” at each shopping station for an overview of the information presented in this manual.

1. Set yourself up at one of the four desks with a laptop computer found in the annex. Enter your email address and password on the Fresh Start Furniture Bank login page and select ‘Personal Shopper’. You are now logged into the web-based virtual shopping application (‘app’). (Note: If the previous shopper is still signed in, please logoff the previous volunteer and sign yourself in.)
2. When a client arrives for their appointment, the client check-in volunteer will give you the **Client General Check in** sheet. Some of this sheet will be completed and will detail:
    1. The client’s name and the number in the family
    2. The ages and sexes of the children of the client
    3. The vehicle(s) that will be used to transport the client’s furniture, etc. (vehicle type, license plate #, any restrictions on use)
    4. Whether a Target gift card was given to the client
3. After greeting the client and identifying yourself, you will complete the rest of this form:
    1. The client’s needs for mattresses, box springs or platform, metal bedframes, and headboards (by member of the family, by bed size)
    2. The items the client is interested in getting today and any priorities, if space is limited
    3. What floor the client lives on
4. You will also complete the **Client Release form**, the **Linens Wish list**, and the **Kitchen Wish List**. Hand off the kitchen and linens wish lists to the volunteers on the shift who are packing those items.
5. In the rare instance that the client has visited the store previously, you will be provided with a list of all items that the client has previously selected. You will need to keep these items in mind when offering additional items to the client.
6. There are five tabs or screens in the shopping app: Client Info, Items, Chat, Audio, and Release. Three of these tabs (Chat, Audio, and Release) are not currently used by the shopper.
7. The shopper is initially on the Client Info screen. Choose the client’s name from the ‘Select client’ drop-down box. The Client Info screen will then be populated with the client’s info. The client check-in volunteer will review the client with you and tell you if any of the client’s contact info needs to be updated. After you make any updates to the contact info, select the green ‘Update’ button found under the contact info.
8. Review the transport choices under Vehicle 1 (and Vehicle 2, if applicable) on the Client Info screen and select the closest match for the client’s vehicle(s). It is not necessary to list the license plate number as the check-in volunteer will have tagged the vehicle. As the client chooses furniture, the app will calculate what percentage of their transport vehicle is full. You can see this percentage at any point while you are shopping by looking back at

this Client Info screen. Once the app calculates that you have filled 50% of the client's transport vehicle(s), it will continually remind you of the percentage filled.

9. Before shopping with the client, you should put the **Check-in Items** in the client's cart as follows:
    1. The shopper selects the Items tab.
    2. In the 'Item Class' drop-down box, the shopper selects 'Check-in Items'.
    3. In the 'Item Type' drop-down box, the shopper selects 'Carts for homegoods' and presses the green 'Add to Cart' button. This cart is the reminder for the movers to collect the client's non-furniture items.
    4. The cart, in the upper right-hand corner of the items screen, should now show '1' item.
10. If a Target gift card has been given to the client, the shopper should enter the Target card into the client's cart similar to the instructions above (Item Type is Target gift card).
11. You are now ready to shop with the client.

Beginning Shopping

1. At each shopping station, there is a laminated double-sided **"Flow for Check In & Starting to Shop"** sheet. This sheet provides guidance for shopping in an organized manner starting with small kitchen items, moving onto furniture, and ending with lamps and artwork. In some instances, due to transport vehicle restrictions and/or priorities of the client, the personal shopper will present items in a different order but a review of this sheet is always helpful to confirm that you have offered all of the categories of items. **This sheet also tells you the categories ('Item Class') in the app where you will find each item and the quantity limitations for each item.** Unless you have been instructed otherwise, please adhere to the quantity limitations provided on this sheet.
2. You will now step through the shopping process, item by item. For each item, your routine will be the same. Let's use couches as an example:
    1. You will tell the client what item you will be reviewing. "Let's look at couches next."
    2. The Shopping Flow tells you that couches are found under the item class of seating. On the Item screen, in the Item Class' drop-down box, select 'Seating". In the 'Item Type' drop-down box, select 'Couch/Sofa". The couch inventory will be displayed on your laptop.
    3. Tell the client the quantity restriction noted on the Shopping Flow sheet. "You may choose any combination of a couch and a loveseat."
3. When you and the client first start looking at the inventory, explain the following to the client:
    1. You will be scrolling left/right to review all the items.
    2. Make sure you read the descriptions underneath each item.
    3. If you want to see an item closer, we will click on the image. To return to the normal view, click on the 'x' in the upper right-hand corner of the picture.
    4. Some items have multiple pictures to give you different views or a close up of upholstery, etc. If multiple views are available, you can see them by clicking on the image.

4. When the client finds an item they would like, add the item to the client's cart by pressing the green "Add to Cart" button under the item they have chosen.
5. If the client wants an item removed from their cart, select the green "Remove from cart" button under the item. This will return the item to the general inventory. *Note: If you find that you need to select "Unpick Item" before picking "Remove from Cart", that means a fellow volunteer has already physically picked that item and therefore you need to tell them to put it back on the floor.*
6. You will repeat this process for each category.
7. If the vehicle(s) is getting full (60%+) at any point during the process, you will need to revisit the client's priorities. You may suggest they skip over several of the categories and focus on the items most important to them. Ask them which of the selected items in their cart are the lowest on their list so that you may tell the in-store movers this information.
8. At any point, you may click on the cart in the upper right-hand corner of the Items screen to see the contents of the client's cart. It is important to review with the client what is in their cart a few times throughout the process to ensure that there is no miscommunication about their choices. You are, however, not showing them their cart so they can change their mind or try to revisit the whole process!

Reconciling of Information

1. After all the furniture and before moving on to the lamps and artwork, the personal shopper should reconcile with the client the furniture that has been selected by show
2. Show them the contents of their cart. Once you get their approval that what is in their cart (which is the bulk of the shopping) appears correct, click on the "Ready to Load" button on the bottom of the Client Info screen. This enters your client into the waiting queue for the movers. The client's name will show on the screen near the loading dock. Tell your client that a volunteer mover will at some point come to tell them where to move their vehicle when it is their turn.
3. Complete the shopping for the last few categories with the client.
4. Show the client their shopping cart one last time. Thank them for the opportunity to help them today. Ask them to wait outside for their turn loading.
5. Confirm with the movers that they are aware of your client's presence on the loading list (especially if it is a slower day and they are occupied with other tasks).

Completing the Process

1. Go into the client's cart and click on the orange 'Mark Picked-up' button below the Target gift card (if applicable).
2. When the volunteers who are selecting linens and housewares are done with their respective jobs, they will give the shopper their completed wish lists.
3. Using the **Linens Wish List**, complete the categories under the 'Linens' item class by entering the following items to their cart:

1. For Item Type ‘Bag/Box Misc Linens’, enter 2 for the average family and select ‘Add to Cart’
    1. For Item Type ‘Blankets’, ‘Comforters’, ‘Pillows’, ‘Sheets’, and ‘Towels’, enter the number on the wish list and select ‘Add to Cart’
4. Using the **Kitchens Wish List**, complete the categories under the ‘Kitchen’ item class by entering the following items to their cart:
    1. For Item Type ‘Bag/Box Misc Kitchen’, enter 2 for the average family and select ‘Add to Cart’
    2. For Item Type ‘Frying Pan/Skillet’, ‘Glasses’, ‘Pots’, and ‘Silverware/Flatware’, enter the number on the wish list and select ‘Add to Cart’
5. Now go into the client’s cart and for each of those kitchen and linens items that you have just put into their cart, click on the orange “Mark Picked-up’ button.
6. Note: The above steps should be done when the movers are not actively working on the client (or done quite quickly while they are!). You do not want to muddy the waters by having the movers think that an item, like a blanket, is in the client’s cart but has not been picked up yet. The movers expect that the # of items selected vs. # of items picked will be equal when they complete the client loading.
7. Add a note about the family. Click on the green “Add Note” button below the notes on the Client Info screen. A pop-up box will appear. List the family members, including the children's names, ages, and genders. This information is not included in the referral so it is good to document. Include any comments about their mattress needs, vehicle for transport, refused items, and any space limitations on the vehicle. Type your note in the box and hit enter.
8. Once the personal shopper is confident that all of the client’s items have fit into their transport vehicle(s) and they have left the loading area, the shopper may close the client's order by clicking on the red ‘Close Order’ button on the bottom of the Client Info screen.
9. If the client completed their shopping on this visit, the shopper may close the referral by clicking on the red ‘Close Referral’ button on the top of the Client Info screen.
10. Staple together the check-in sheet, the Release, the linens wish list, and the kitchen wish list. File this group of formsin the file cabinet next to the front desk under the appropriate year.

Selecting Linens and Kitchenware

Selecting and Packing Linens

In this job, you will support the Personal Shopper who is working with the client. While the Shopper and the client are choosing furniture, etc., you will be selecting bed, kitchen, and bath linens for the client. You will also be packing these items up for the client.

It is our goal to provide the client with a nice selection of linens that match their tastes and satisfy their needs, however, keep in mind that we can only do the best we can. It is important to balance your client's wishes against the overall good of all clients. Limit yourself to picking only one or two new items while filling in the rest of the client's needs with used items. Do not take the last remaining item in multiple categories; leave some for the others. Keep in mind the client's color and taste preferences but be ready to be *flexible* if their choices aren't readily available.

Before beginning the selection process

1. You will be given the orange Linens Wish List either directly from the Personal Shopper or from the volunteer who is handling client check-in. Review this form. Direct any questions you have about this form to the volunteer who completed the form.
2. Familiarize yourself with the client and their family.
    1. How many adults are in the family?
    2. What are the sex and ages of their children (if they have any)?
    3. What size beds do they sleep in?
    4. What are their color preferences for bedding, kitchen, and bathroom linens?
    5. Are any vehicle restrictions noted? Can you pack in bulky boxes or do you need to be careful in your packing?
3. Pay attention to what is marked as "yes" (wanted) versus "no" (not wanted) on the Wish List. Do not waste time and inventory giving items to clients that they have indicated they do not need.
4. Familiarize yourself with the linens area of the store.
    1. Twin, Full, Queen, and King bedding each have their own shelving areas. In each of these areas, the sheets are on the top shelf, blankets on the second shelf, and comforters on the lower shelves.

2. New bed pillows are lined up on a shelf or found in a box.
3. Kitchen linens are grouped together, as are the bathroom items.
4. Stuffed animals are kept in a bin/bag in the linens area.

5. While reviewing the linens area, note any items that appear to be in short supply or, conversely, are in abundance. Do you see signs indicating you may give out more than the usual allotment of any items? Are there any specials, such as hand soap, that can be given out to every client?
6. Be aware that the Shopper, at the end of their session with the client, will need to record in the web-based shopping system the quantities of specific items given to the client. You therefore need to clearly indicate on the Linens Wish List which items you gave the client and, **specifically for bedding linens (sheets, blankets, and comforters), new bed pillows, and towel sets indicate the quantity given**. The shopper will enter the number given of these specific items into the web-based shopping system. Any items other than bedding, pillows, and towel sets are accounted for by the Shopper entering that multiple “bag/box of misc. linens” were given to the client.
7. Set yourself up at packing table. Co-ordinate with the volunteer scanning QR codes the color for the client’s name tags and note which cart has been reserved for this client. Make sure a cone has been placed on the cart with the client’s name tag on it. You will be packing as you shop. To avoid confusion, make sure that any boxes or bags that you cannot fit on the cart(s) are seated next to the cart and are clearly labeled with your client’s name on the appropriate color tag.

Shopping for the Linens Wish List items

1. Select the **bedding** for each bed on the Linens Wish List, as requested. For each bed, the normal allotment is one set of sheets, one blanket, and one comforter. Posted signs will indicate if you can give extra linens or if there are limitations. If there are flannel sheets, these can be handed out as an additional set for the client. If possible, try to coordinate the linens for each bed. Always remember who you are shopping for. *The bedding preferences of a young boy differ from that of a elderly female!*
2. Select new **bed pillows** for the client, if requested. Based on the availability of pillows, you may at most give one pillow per family member or, if the supply is low, you will be given a cap on how many you may provide per family.
3. If the client has young children, select a **stuffed animal** for each child (if available).
4. Select **bathroom items**, as requested. Each member of the family gets a towel set. When towels are in short supply, adults will be given a towel set and children will receive just a bath towel. Other bathroom items are handed out based on availability and the client’s interest in the item.
5. Select **kitchen linens**, if requested. If the kitchen table size is not listed on the wish list, check with the Personal Shopper about what size and shape kitchen table the client has selected or look on the web-based shopping system to find which table the client has selected. If the shopper has not indicated kitchen colors, the kitchen linens can be chosen

to match the dish set the client has chosen (dish set can also be viewed on the web-based shopping system). The size of the client's family dictates the *minimum* number of placemats and/or napkins to give a client.
6. If the client would like **throw pillows or throw blankets** for their home, look on the web-based shopping system to see which couch and/or upholstered chairs the client has selected and determine which colors would be best. If pillows or blankets have been staged on the couch in the showroom, pack up these loose items to go to the client.

After your shopping

1. Make sure you have clearly indicated what you have given the client on the Linens Wish List.
    1. Did you check off everything that you gave?
    2. Did you clearly indicate the number of sheet *sets*, blankets, comforters, towel sets, and pillows that you handed out?
2. Give the completed Linens Wish List to the Personal Shopper.
3. Make sure the volunteer scanning the QR codes, who is coordinating the loading with the movers, is aware of the status of the linen items.
4. When time permits, restock the linen shelves.

Selecting and Packing Kitchen

In this job, you will support the Personal Shopper who is working with the client. While the Shopper and the client are choosing furniture, etc., you will be selecting kitchen items. You will also be packing these items up for the client.

It is our goal to provide the client with a nice selection of items for their kitchen that satisfy their needs, however, keep in mind that we can only do the best we can. It is important to balance your client's wishes against the overall good of all clients. Limit yourself to picking only one or two new items while filling in the rest of the client's needs with used items. Do not take the last remaining item in multiple categories; leave some for the others. Keep in mind the client's preferences but be ready to be *flexible* if their choices aren't readily available.

Before beginning the selection process

1. You will be given the yellow **Kitchen Wish List** either directly from the Personal Shopper or from the volunteer who is handling client check-in. Review this form. Direct any questions you have about this form to the volunteer who completed the form.
2. Familiarize yourself with the client and their family.
    1. How many members are in the family? How many children?
    2. Does the family like to cook? To bake?
    3. Are any vehicle restrictions noted? Can you pack in bulky boxes or do you need to be careful in your packing?

4. Has the family requested a kitchen starter kit (1st item on the kitchen wish list)? The client's interest in this kit indicates they have very few items for their kitchen. If you give them a kitchen starter kit, you need not worry about the specific tools listed in the kitchen tools section found on the top of page 2.
3. Pay attention to what is marked as "yes" (wanted) versus "no" (not wanted) on the Wish List. Do not waste time and inventory giving items to clients that they have indicated they do not need.
4. Familiarize yourself with the kitchen area of the store. Most items are stored in the newest part ("annex") of the store on the long metal shelving. Additional quantities, if any, are stored in the kitchen sorting area. It should be sufficient to select items from the annex unless you are looking for a particular or unique item that you think might be found in the kitchen sorting area.
5. Be aware that the Shopper, at the end of their session with the client, will need to record in the web-based shopping system the quantities of specific items given to the client. You therefore need to clearly indicate on the Kitchen Wish List which items you gave the client and, **specifically for silverware, drinking glasses, pots, and skillets indicate the quantity given**. The shopper will enter the number given of these specific items into the web-based shopping system. Any items other than silverware, drinking glasses, pots, and skillets are accounted for by the Shopper entering that multiple "bag/box of misc. housewares" were given to the client.
6. Set yourself up at packing table. Co-ordinate with the volunteer scanning QR codes the color for the client's name tags and note which cart has been reserved for this client. Make sure a cone has been placed on the cart with the client's name tag on it. You will be packing as you shop. To avoid confusion, make sure that any boxes or bags that you cannot fit on the cart(s) are seated next to the cart and are clearly labeled with your client's name on the appropriate color tag.

Shopping for the Kitchen Wish List Items

Kitchen Starter Kit

- If requested and available, provide the client with a pre-made kitchen starter kit. If a kit has not been prepared in advance of the shift and a client wishes to have one, you will need to instead pack up all of the items on the kitchen starter list that you can find.

Kitchen Table Items

- Has the client indicated they would like extra soup bowls, mugs, serving bowls, or serving platters? Look at the client's selected dish set in the web-based shopping system to see what color items might complement their dish set. Also note that this wish list was filled out before the client chose their dish set. Therefore, if their chosen set comes with sufficient bowls or mugs, you do not need to give them more.

- Silverware is prepacked in bags of serving sizes of 4, 6, 8, etc. The size of your client's family dictates the *minimum* serving size they should be given but remember, no different than with your own family, sometimes dishes may be dirty or company may come over. If supplies permit, any client gets a minimum of a serving for 4 and families should be given generally two times the family size.
- Similar to silverware, the size of your client's family dictates the *minimum* number of glasses they should be given.
- Select plastic dishes and cups for the adults and/or children, as requested.

Pots & Pans

- If supplies permit, clients are allowed 1 of each size pot (small/medium/large, if available) and skillet (small/large, if available). Extremely large pots should be given to bigger families.

Other

- Select a tea kettle and/or an ironing board if requested and if available

Kitchen Tools

- If you have given the client a kitchen starter set, this list of kitchen tools should be crossed out and may be ignored as these items are in the starter kit.
- If the client has not selected a kitchen starter kit, try and fill the client's wish list for specific items.

Not in Starter Kit

- Some items can be handed out based on family size (casserole dishes, food storage containers) while other items may only be 1 max per family (pie plate or muffin tin) due to generally low inventory.
- Take advantage of any laundry baskets or garbage cans you give a client to pack items in!

After your shopping for items in the Kitchen Wish List

1. Make sure you have clearly indicated what you have given the client on the Kitchen Wish List.
    1. Did you check off everything that you gave?
    2. Did you clearly indicate the number of silverware, drinking glasses, pots, and skillets that you handed out?
2. Give the completed Kitchen Wish List to the Personal Shopper.
3. Make sure the volunteer scanning the QR codes, who is coordinating the loading with the movers, is aware of the status of the kitchen items.
4. When time permits, restock the kitchen shelves.

How to Pick Mattresses, Bed Frames & Platform Beds

Personal Shopper

- Pick headboards first so you know the sizes necessary
- Some headboards come with side rails or a metal bedframe, so they don't need a platform or additional metal frame

Mattresses

- Select **Mattresses - General** or **Mattresses - Grant** as the class
  - Queen – for a couple
  - Full – adult(s) 18 or older
  - Twin - kids ages 2 and up
  - Twin Xl – same length as queen, good for tall kids or adults
  - Toddler Mattress – find them in the **Children's Furniture** item class if we have any.
    - These mattresses fit in a crib or a toddler bed

Platform Beds- Grant

- **We buy these with grant money**
- Twin, Full & Queen
- Only need a mattress
  - No box spring is needed.
  - No slats needed
  - No other metal frame.
- Good if the truck or vehicle is small and we need to save space
- Comes in a compact box
- Assembly is required
  - A picture is on the wall next to the frames
- Has 14 inches of storage space underneath and is very sturdy
- We have metal brackets for headboards only

Metal Bed Frames- used (Item Class “Mattresses-General”)

- First, pick used metal Bed Frames - if the size is available.

Grant Metal Bed Frames - (Item Class “Mattresses Grant”)

- **We buy these with grant money**
- If there are **NO** Used bed frames available, take one from the Grant category
- If the headboard/footboard comes with side rails, a metal frame is not needed
- None of these metal frames require slats to support a box spring
- #17047- Twin/ Twin XL or Full
- #25252- Full, Queen, or King- has a center span

Personal Shopper- Client Shopping Flow

Flow for Check in & Starting to Shop

1. The Front Desk volunteer will check in the client by noting their arrival on the white board, completing the top half of the Client Check-In form, tagging their vehicle and giving the client their Target gift card (if applicable). They will bring the client to their Shopper.
2. The Shopper will complete the Client check-in Form, the Release, and also the Linens & Kitchen Wish lists. These Wish Lists will be given to the linens and housewares packers.
3. Sign in as a Personal Shopper and select your client.
    1. Enter Client's Vehicle Info for the In Store Movers and for space calculations.
    2. Make any necessary changes to the referral. Click Update.

Shopping through the categories

If you don't see a category listed in Personal Shopping System, it means we have NONE

Check-In Items

- Select Check-In Items: put a 'Cart for Homegoods' and a 'Target Gift Card', if applicable, in the cart.

Kitchen Dishes, Appliances & Kitchen Checklist

Kitchen – Item Class

- Dish Place Setting – Pick 1 set
- Dish Place Setting-Extra - Pick 1 set
- Small Appliances – Pick 2
- Free Small Appliances – Pick 1 if needed
- TV - Pick 1

Bedroom

Pick mattresses, platforms, bed frames: Always pick first from Mattress - General and then from Mattress - Grant (adhering to distribution guidelines)

Beds – Item Class

- Headboards – 1 per bed
- Bunk Beds & Toddler Beds – as needed

Dresser – Item Class

- Armoires, Dresser -Tall, & Dresser -Long – Pick 1 dresser per family
- 2nd or 3rd Dresser – Pick 1 for a family of 4+

*****If a dresser includes a nightstand(s) that takes away from the end table allotment of 2 end tables/nightstands per family****

Living Room

- Seating – Item Class:
  - Bench - 1
  - Couch, Loveseat, Sleeper Sofa - Pick 1
  - Upholstered chair/Recliner – Pick 2 [Only 1 Recliner per family]
  - Rocker – 1
  - Footstool/Ottoman – 1
- Tables – Item Class:
  - Coffee Table – 1
  - End Table – Max of 2 end table and nightstands combo
  - Free End Tables – 1
  - Desks – 1
  - Misc Table - 1
- Cabinets – Item Class:
  - Bookcases – 1
  - Storage Cabinets – 1
  - TV Stands – 1
- Misc – Item Class:
  - Children’s Furniture – as needed for families with kids
  - Misc Furniture - 1
  - Rugs - 1

Kitchen Furniture

- Tables - Item Class:
  - Kitchen Table – you will see if chairs come with the set
- Seating – Item Class:
  - Kitchen chairs & Misc chairs/Bar Stools – As Needed

*******Review the shopping cart, click Ready to Load, notify Movers*******

Other Items

- Lamps – Floor, Table (1- Floor & 2 – Table)

- Lamps Free – pick 2 as these are more accent lighting or desk lamps
- Artwork – pick 4 to 6 pieces out of the categories
- Mirrors & Clocks – under artwork - pick 1 each
- Misc Items – under Misc Item Class - As Needed

Final Steps

Enter items from the Kitchen and Linens Check Lists into the client's cart. Mark these items as 'picked'. Add a note about your client on the Client Info page of their record. Describe the family (children's ages and genders), their mattress situation, the vehicle(s) they had for transport, any items they declined, and any shopping or space limitations. Close the order. If applicable, close the referral.