Front Desk Job Responsibilities

Front Desk and Client Check-in Duties

Tasks associated with the front desk and client check-in are as follows:

1. Get gift cards from the safe for the number of clients MINUS any refugee clients handled through he various agencies (they don't get gift cards). Put them in the bank pouch in the desk drawer or in your apron/pocket. Do not leave them unattended on the counter or desk.
2. Update the white board with the client names and towns, if it's not already set up. Write out two sets of truck tags for each client's last name, and tape one to the board and put the other set in the binder clip on the nail by the mover's board/display.
3. If you see volunteers are in the store but they haven't checked in, check them off. If any volunteers come in who had not signed up, add them to the shift in the volunteer scheduling system.
4. Scan the notes and family size info for the day's clients and have a general idea which personal shopper you are going to have shop for each client.
5. For each client that arrives:
    1. Greet the Client.
    2. Verify name, address, and contact info on referral form. Note on the referral form that information is correct or which items need to be updated.
    3. Write vehicle/truck size on the white board and on the green check-in sheet. Determine if vehicle is empty.
    4. Give client a Target gift card and record the card # on the green check-in sheet.
    5. Review list of shoppers and determine which shopper is available. Assign a shopper and write the shopper's name on the white board.
    6. Explain bonus items to the client and give the client a bag to shop these items. Ask the client to take these items to their vehicle before meeting with their shopper. If the shopper is ready, the bonus items can be shopped for at the end of their visit.
    7. Introduce the client to their assigned shopper.
    8. Put the orange tag with the client's name on the back of their vehicle.
    9. Be available for the shopper if they have any questions.
6. If a client wants to shop remotely, make sure you know whether the truck is coming and if so, have the shopper call the client at the appointment time. In that case, the shopper will fill out all three sheets. Put the gift card in an envelope with the client's name and give it to the QR person to put it in the dish set.

7. Keep an eye on the clients' carts to make sure the shoppers have all the correct bed parts and are keeping to the established limits.
8. Two to three days ahead of each shift, go to the Client Appointments or Schedule Details app and click on each client and check their notes to see if there are any matching names/previous visits/strange circumstances, etc. If this is a second visit from quite a while ago, we usually let them come again but we print out the list of what they got the first time. If it's a second visit from quite recently, unless it's for one item, we usually cancel the appointment and reach out to the agency explaining it's one visit only. Sometimes a duplicate name can be confusing especially for nationalities that use several different last names. Usually checking the cell phone or address makes it clear. If we have to cancel an appointment due to it being a second trip, we usually suggest Household Goods to them.
9. At end of shift, go to the Client Appts app and check "visited store" for each client who has come in. For any client no-show, check 'no-show'. If they didn't call to explain, go into the database and close the referral. If they did call with a reason, go into the database and make a note of the reason that they missed their appointment and leave their referral open for one more try.
10. Get all the white sheets for the day (you may have to retrieve some from the shoppers or they might be on top of the file cabinet next to the desk) and put the no-show sheets on top - write no-show on them - and then staple the whole days' worth together and put it in the front of the accordion file on top of the white desk. We save these for a month or so in case we need to look back at anything.
11. File the volunteer sheet in the folder on the desk. These are saved for a month in case we need to refer back to them for exposure to sickness on a certain shift, etc.
12. Return any unused Target gift cards to the safe, and count the total number of gift cards, and compare it to the number in the system (inventory #4621). Write that number down on the post-it in the safe and if it matches check it off. If it does not agree, you need to review the order for each client visiting the store to ensure that the shopper correctly added the Target gift card. We are doing this after every shift to make it easier to catch mistakes.
13. Go to the very back of the storage area and get the mail from the tray that is by the back right door. Bring it up to the desk, open everything, and if there are any checks stamp the back with the deposit stamp in the drawer. Put any mail that needs to be dealt with in the safe for the financial person to handle.
14. Erase the board, clean it if necessary, and set up the client list for the next shift.

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