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.

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