Alison's Pantry®

Sales Rep Procedures Manual

Updated 6-4-25 www.alisonspantry.com

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Welcome to Alison's Pantry!

We're excited to have you join us as a Sales Representative. This manual will guide you step-by-step through your first few months and serve as an ongoing resource to help you grow your business.

You'll receive product highlights and helpful tips via email, our Rep Facebook Group, and on our blog at www.pantryacademy.com. Be sure to check these regularly for fresh ideas to attract new customers and better serve your existing ones.

• Email Rep Support at support@alisonspantry.com • Main Office: 866-5-PANTRY (866-572-6879) • Text Number 801-796-6411 or 85775 • Rep Website: https://alisonspantry.com/sellers-portal/login	• Rep FB page: https://www.facebook.com/groups/145765593745 • To view the training video again, go to https://pantryacademy.com/how-to-videos/

Welcome to our Alison's Pantry family!

We want to help you get a running start with your business.

STEP 1—Paperwork

You should have received a welcome email from your Sales Manager outlining the steps that need to be completed before you place your first order:

- **Complete the Bank ACH Form**

  After you place your first order, you will be sent a Bank ACH form to fill out. This gives us the information for the bank account you'll use for your AP business. This account will be used to deposit your commission upon request and to withdraw funds if a customer's cash payment is required due to a declined order payment with no alternate payment method available. We recommend using a separate account for business purposes. If you need to update your banking information, you must submit a new ACH form. Your Sales Manager can email you the form.

STEP 2—Social Media

Facebook

We highly recommend setting up a free Facebook business page or group for your Alison's Pantry business. It's easy to manage and allows you to post regularly without overwhelming friends who aren't customers. Video tutorials are available to guide you through the setup process.

- **Sign up for our Rep FB Group**

  You will receive a link in the welcome email to join our Alison's Pantry Representatives group.

- **Set Up a Customer Group or Business Page**

Whether you choose a **customer group** or a **business page** is up to you—both are great tools for marketing and sending order reminders. Creating one allows you to focus your communication on customers who can place orders with you. For step-by-step setup instructions, please watch the video tutorials provided below:

Video Tutorial 1 - https://bit.ly/2RFRrgD

Video Tutorial 2 - https://bit.ly/2CcRCGw

Facebook Group

A **customer group** lets you add friends from your personal Facebook network. Only group members will see your posts, so you won't overwhelm your other Facebook friends. This option is more private and ideal for targeted customer communication.

Facebook Business Page

A **business page** is visible to anyone on Facebook, and people must LIKE your page to see your posts (unless they visit it directly). It offers advanced features such as creating events and boosting posts (paid advertising to reach a wider audience).

NOTE: Boosting posts incurs a cost based on your budget and target audience.

How to Share a Facebook Post

Any post from a public group or page can be shared on your personal Facebook. To share a post:

1. Click **Share** (located under the post, next to the right arrow).
2. Choose one of the following sharing options:
    - **Share Now (Public):** Posts directly to your personal timeline with the option to add a comment.
    - **Share to…:** Share via Messenger or other listed options.
    - **Send in Messenger:** Sends the post privately to individuals via Messenger.
    - **Share on a Friend's Timeline:** Choose a friend's timeline and add a comment if desired.
    - **Share to a Page/Group:** Post to a business page or group you manage, with an optional comment.

3. Click on **Post** button (blue box in the lower right corner).
4. A confirmation box will appear once the post is successfully shared.

   Tip: When sharing to a group or page you manage, you can schedule it for a future date/time by clicking the calendar icon.

For more info, check out this link:

https://pantryacademy.com/2018/08/29/12-tips-for-going-live-on-facebook/

Instagram

Instagram, owned by Facebook, is a photo and video-sharing platform that offers a fun and creative way to connect with others. It's an excellent place to showcase Alison's Pantry products and meals you've prepared using them. Follow Alison's Pantry on Instagram: https://www.instagram.com/alisonspantryfoods/?hl=en.

To create your own Instagram account and to learn how to use the platform, visit: https://help.instagram.com.

Email

Sales reps who want a separate email for their Alison's Pantry business can create one using whichever email provider they wish. The only thing we ask is that you do not use the words Alison's Pantry in the name of your business email. Examples of business emails are: APbyJane@provider.com, JaneDoeAP@provider.com, JaneDoePantry@provider.com.

Once your customer emails are added to your email contacts, create email groups of fewer than 50 recipients to easily send updates and promotions to just your customers.

Each group setup varies by provider, so familiarize yourself with the process for your specific platform.

Your Sales Manager is available to help you create customer groups in your email program if needed.

Texting Apps

Texting is an effective way to send order reminders and updates to your customers. There are several texting apps available on the Google Play store and iTunes, some are free and some are paid apps.

- **Individual Texts** - Sending personalized texts to each customer using their name and specific details creates a more personal connection, though it may take more time depending on your customer base.
- **Group Texts** - **Avoid using group texts** unless your phone or app sends them as individual messages. Otherwise, all recipients may see and reply to the entire group, which can be frustrating and unprofessional.
- **Texting Apps** – Consider using apps designed for group messaging that send individual texts. Popular options include: Reach, Remind, and Hit Em Up.

These tools can save time while maintaining a personal touch.

STEP 3 – Sales Training

After completing your paperwork and receiving your catalogs, you'll schedule a call with your Sales Manager to begin your sales training. This training will consist of 3 scheduled training sessions: 1 - Promoting Alison's Pantry Products, 2 - Ordering Alison's Pantry Products, and 3 - Receiving Alison's Pantry Products. Each training session will take approximately 30 minutes.

Once your training is complete, your Sales Manager will be available to provide ongoing training and support throughout your time as a sales rep.

<u>Here is a little bit about your Sales Manager, Becky Price</u>.

Becky lives in Rock Springs, Wyoming, with her husband, Darrell. They have 5 grown children and 4 grandchildren, and enjoy being grandparents and serving in their church.

Becky has been a customer of Alison's Pantry since October 1995. She became a sales rep in January of 2000 and a sales manager in August of 2006.

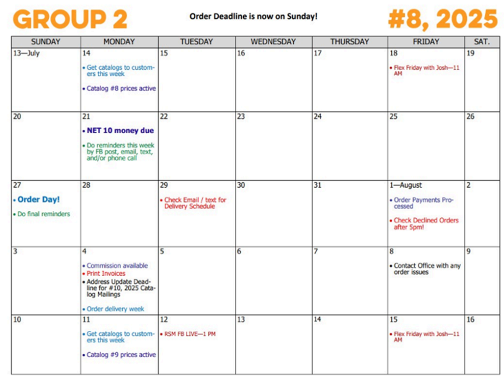
She loves helping new sales reps start their own AP home businesses and selling our amazing products to their friends, family, neighbors, and associates.

Alison's Pantry®

Tools for a Successful Business

To go the distance, a sales rep must be steady and consistent to build a solid business. As a sales rep, you need to plan ahead and make time each month to take care of your customers and their orders.

Sales Rep Monthly Schedule


GROUP 2 Order Deadline is now on Sunday! #8, 2025

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT.
13—July	14 • Get catalogs to customers this week • Catalog #8 prices active	15	16	17	18 • Flex Friday with Josh—11 AM	19
20	21 • NET 10 money due • Do reminders this week by FB post, email, text, and/or phone call	22	23	24	25	26
27 • Order Day! • Do final reminders	28	29 • Check Email / text for Delivery Schedule	30	31	1—August • Order Payments Processed • Check Declined Orders after 5pm!	2
3	4 • Commission available • Print Invoices • Address Update Deadline for #10, 2025 Catalog Mailings • Order delivery week	5	6	7	8 • Contact Office with any order issues	9
10	11 • Get catalogs to customers this week • Catalog #9 prices active	12 • RSM FB LIVE—1 PM	13	14	15 • Flex Friday with Josh—11 AM	16

Use the **Rep Monthly Calendar** for weekly reminders and key action steps. You can access it on PantryAcademy.com under the specific Catalog Resource page.

2 Weeks Before Order Deadline

- Distribute catalogs to active and potential customers by mail or hand-delivery.

1 Week Before Order Deadline

- Send daily reminders via email, text, Facebook, or phone.
- Begin entering customer orders as they come in.

Order Deadline Day (Monday at 8 AM Mountain Time)

- Send final reminders 1-3 days before the deadline.
- Check your commission total in the **Rep Portal** to ensure you meet the $750 minimum for commission eligibility.
- On **Tuesday**, you'll receive a link via email and text to view the **Delivery Schedule**. You'll need your **Order Group** and delivery **Route Number** to view the correct schedule.

Monday of Delivery Week (After Payments are Processed)

- Print your **Commissions & Net10** Report and customer **invoices.**
- Check for declined payments. Notifications are sent by email/text on Friday or Monday if you have any.

Delivery Day

- Meet the delivery truck, organize your order, and prepare for customer pickup or delivery.

Within 2 Days After Delivery

- Arrange customer pickup or delivery times.

7 Days After Your Truck's Last Delivery

- Ensure any cash customer payments (from declined order payments) are deposited into your business bank account. These will be withdrawn by the office on the following Monday.

Ongoing Through the Month

- Communicate regularly with customers – share the **Close Out List** and promote **Hot Deals**, **Limited Quantity Items,** and **Price Changes** via email, Facebook, or text.

<u>IMPORTANT</u> – Are You a Replacement Rep?

Building trust with your new customers is essential. They had a relationship with the previous rep, and it will take time and consistent communication to earn their confidence.

- Introduce yourself as soon as possible.
- Follow up regularly—this greatly increases the chances they will continue ordering from you.
- You have **3 months** to make contact. After that, customers who have not been contacted may be reassigned to another nearby rep.

Order Deadline

Alison's Pantry orders are due every 4 weeks on a **Monday at 8 AM mountain time**, based on your assigned **ordering group**.

> *NOTE: There are no order deadlines or deliveries during the weeks of **July 4th**, **Thanksgiving**, or **Christmas** which will push the next order back one week each time.

Your **Sales Manager** will inform you of your group assignment, and you will receive a **magnet** from the office with the current year's ordering schedule.

You can also view the **Ordering Schedules** on PantryAcademy.com by clicking the yellow **Ordering Schedules** hotlink. This page includes:

- A **Master Ordering Schedule**
- Individual **Group Schedules** that you can print or upload to a service like VistaPrint to create magnets or postcards for your customers.

  **Sales reps are responsible for the cost of printing customer schedules.*

Catalogs

To get you started, Alison's Pantry will mail you **60 free catalogs** to give to each person on your **"Who Do You Know" list** at no charge**.**

With your first and second orders, each ordering customer will receive a catalog in their order at no cost, plus you will get 60 more catalogs to hand to those who did not order, plus any new people to help you grow.

Ongoing Catalog Distribution (Month 4 and Beyond)

Starting with your 3rd order:

- Each ordering customer will receive a catalog in their order at no cost.
- You'll receive **1 free packet of 10 catalogs** to give to non-ordering customers.
- You will order catalog extra packets using **Item #1337** if you need more catalogs for non-ordering customers. The cost is $2.27 per packet of 10 catalogs.
- You can also direct them to the **online catalog** at https://alisonspantry.com/catalogs1.

Catalog Mailing Option

Alison's Pantry offers a low-cost mailing service for sales reps who want catalogs sent directly to non-ordering customers. Catalogs are mailed at the **bulk rate of $0.70 each** (as of 2025) and typically arrive **1-2 weeks before the order deadline**.

Catalogs are mailed **3 weeks before each order deadline** to ensure timely delivery.

> ***A Word of Caution About Catalog Mailings***
>
> *Once catalogs are mailed, Alison's Pantry cannot control delivery times. This service is used at your own risk, and **we cannot refund mailing costs** if catalogs are delayed by the postal system and do not arrive before the order deadline.*
>
> *If delays occur frequently, we recommend discontinuing the mailing service and instead hand-delivering or mailing catalogs yourself using **First Class** postage to ensure timely delivery.*

Catalog Mailing Cut-Off Date

If you choose to have Alison's Pantry mail catalogs to your customers, their mailing information must be added to the **Rep Portal** before the **Catalog Mailing Deadline**—which is the same day and time as your order deadline each month.

You can find the **Catalog Mailing Deadlines** on the **Mailed Catalogs** page in your Rep Portal. Click the red link at the top of the page, then select the **Catalog Mailing Deadlines** tab. View the **Master Schedule**.

Example:

The deadline to sign up for Catalog #4, 2026 mailings was the same day as the order deadline - Monday, April 23rd, at 8 AM Mountain Time.

> *Mailing costs will be deducted from your available commission on the Monday after customer order payments are run, which is also one week after the order deadline. To calculate mailing costs, here is an example: 30 non-ordering customers x $0.70 postage = $21.00 mailing cost*
>
> Be sure that sufficient funds are available in your commission account to cover the mailing cost.

How to Select Customers for Mailed Catalogs

On the **Mailed Catalogs** page in your Rep Portal:

- **Check the box** next to each customer you'd like the office to mail a catalog to.
- If you prefer to hand out catalogs yourself, **leave all boxes unchecked.**
- **Click the orange SAVE button** after each change.

  Once a customer is marked to receive a catalog, they will continue receiving them in the mail when they don't order **until you uncheck the box and save the update.**

Important Reminders:

- Ensure each customer selected has a **complete and correct mailing address.** Catalogs with incorrect addresses are returned to the office, and reps are **not notified** due to the volume of returns.
- If a customer reports not receiving their catalog, verify their mailing address in their profile.

Become Familiar with the Catalog

Understanding how the Alison's Pantry catalog is organized will help you better serve your customers and guide them to the products they need. Here's a general layout of the catalog sections:

1. **New Products**—Can be featured on one page in the catalog or page numbers of where to find them are noted on the front page.
2. **Frozen Products**—Organized by category:
    - Breakfast Items
    - Pork, Beef, Poultry
    - Soups
    - Seafood
    - Vegetables & Fruits
    - Italian & Mexican
    - Asian & Convenience Items
    - Appetizers & Sides
    - Breads, Cheese, & Desserts

3. **Spices**—Includes spice containers.
4. **Mixes**—Muffin, cake, cookie, pancake, and brownie mixes.
5. **Baking Supplies**—Chocolate chips, non-stick sprays, etc.
6. **Kitchen Tools**
7. **Snacks**
8. **Beverages**
9. **Club Store Direct**—Kirkland Signature brand items
10. **Pantry Basics**—Bulk baking ingredients, dry pasta, containers, and more.
11. **Hot Deals & Highlights**—Found on the front and back page and throughout the catalog.

Familiarity with the catalog layout will help you answer customer questions and recommend products with confidence.

How Products Rotate in the Catalog

Our full--color catalogs are updated monthly and feature a combination of **new products, seasonal items, sale items,** and our standard lineup of **restaurant-quality foods.**

New Products

Featured at the beginning of the catalog, new items remain for a minimum of **2 months**. After that, they are evaluated based on sales performance:

- If successful, they move into the main catalog.
- If not, they are removed and added to the **Closeout List** and are available while supplies last. This list is found under the *Other* tab on the **Catalog Resource** page on PantryAcademy.com.

  NOTE: New products that are coming in the next set of catalogs will be available to purchase as soon as they are received in the warehouse.

Seasonal Products

Available for a limited time each year. Examples include:

- Soups
- Janey Lou's baked goods

- Ice cream & Creamies
- Canning supplies
- Holiday-themed items

Sale Items

Each month features new sale items. Most rotate monthly, with the exception of spices, which are discounted for **two consecutive** catalogs (e.g., Catalogs 1 & 2, 3 & 4, etc.)

Catalog Pricing

Catalog prices are set approximately **two months in advance** and remain in effect until the **Monday after Group 4's order deadline.** This allows Group 1 reps about a week to place orders from the new catalog.

- If a customer **misses an order deadline** but places an order **before** the new prices are updated, they will be charged the price shown **on the day the order is placed**, not the day of delivery.
- If a customer wants to take advantage of a **new sale price**, they must **wait until after Group 4 closes their order** and the new catalog pricing goes live—typically by **Monday at 10 a.m.** on the website.

  Note: The website always reflects the most current pricing. Discrepancies between the catalog and the website may result from human error or supplier price changes. This is noted on the **front cover** of each catalog:

  "Supplier changes or market fluctuations may force pricing to not match our printed catalog. Please visit alisonspantry.com for the most current pricing."

Sales reps are responsible for informing customers of any price differences when placing orders on their behalf.

Product Information: Hot Deals

Hot Deals are deeply discounted items that may have minor cosmetic issues, such as irregular breading or inconsistent sizing. Some may also be due to product overruns. These items offer great value for customers looking to save money.

While most Hot Deals meet our quality standards, there may occasionally be a product that does not meet them. If this happens, **request a refund as soon as possible**—and don't hesitate to try Hot Deals again.

It's rare, but it can happen. Stay positive—Hot Deals can become a valuable part of your customers' regular orders.

Online Catalogs

Each month's catalog is available in **PDF** format on the Alison's Pantry website. Customers and sales reps can easily view or download the current catalog at: https://alisonspantry.com/catalogs1. Only the current ordering catalog will be there.

90-Day Double Your Money Back Guarantee

At Alison's Pantry, we want customers to feel confident in the quality of our products. That's why we offer a **90-Day Double Your Money Back Guarantee** on most items (see inside the front cover of each catalog for details).

Refund Policy Overview:

- **Within 90 days of purchase:**

  Customers receive **double their money back** on the product price plus sales tax (shipping is not refunded), when the unused portion is returned to their sales rep.

- **Between 91-180 days:**

  Customers receive a **full refund** (100% of product price only) if requested within this time frame.

- **After 180 days:**

  No refunds are available.

Important Notes:

- **Hot Deals, #2 products, and non-food items** are not eligible for double refunds:

    - These items are still refundable at **100%**, but not under the double guarantee.
    - Non-food items that are damaged or defective must be returned to the office for a refund or replacement, based on availability and customer preference.
- **All products must be opened and tried** to qualify for a refund.
- **Refunds are issued as account credit** for future purchases.

This policy helps ensure customer satisfaction while maintaining fairness and product quality standards.

How to Search for Items in the Online Catalogs

1. Visit www.alisonspantry.com and click the **Catalogs** link.
2. Select the catalog you want to search to open the **PDF file.**
3. Press **Ctrl + F** (Windows PC) or **Command + F** (Mac) to open the search box.
4. Type a **product name, keyword,** or **item number** into the box, then click the magnifying glass or press Enter.
5. The catalog will jump to and highlight the matching text.
6. Use the arrow keys near the search box to scroll through all matches found in the catalog.

This tool makes it quick and easy to locate specific products or keywords in any monthly catalog.

Customer Reminders

Our most successful sales reps understand the importance of consistent follow-up. Reminding your customers to place their order each month is a key part of running a successful Alison's Pantry business.

Effective Reminder Methods:

- Phone calls
- Text messages
- Emails
- In-person conversations

> "Telling people over and over doesn't end. You'll have to do it every month. After 13 years, I still have to send multiple reminders, and it pays off!"
>
> Haley Notter is consistently one of our top sales reps in the whole company. Her sales average over $8,000 each month.

- Facebook posts or Messenger

Many reps worry about bothering customers with reminders, but the truth is—they appreciate them! You're not being a nuisance; you're providing **excellent customer service.**

Helpful Resources for Reminders

We offer tools to make customer follow-up easier and more effective:

Phone Scripts:

Find call templates for new, current, inactive, and special order customers, plus helpful responses to common objections. Find the phone scripts here: https://pantryacademy.com/phone-scripts/). *(Managing My Business, Reminder Scripts, Phone Templates)*

Marketing Tools:

Each month, we provide:

- Professional social media images
- Thursday marketing emails
- Sample text reminders

Access these from your **Rep Dashboard** by clicking the **Pantry Academy** hotlink, then:

- Go to **Catalog Resources, Social Media Images** for catalog-specific graphics
- Go to **Managing My Business, Reminder Scripts, Text Templates** for ready-to-send messages

Using these tools regularly will help you stay connected with customers and boost your monthly orders.

Creating New Customer Accounts

To create a new customer account in your **Rep Portal**:

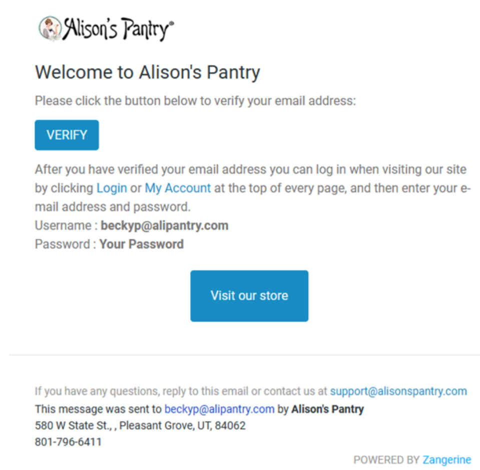
1. Click on the **Customers** tab on the left side of the screen.
2. Click **Create Customer** (top left corner).
3. Fill in **all required fields** accurately (The *Note* field is optional. **Don't** use the *Unit* field. It doesn't print on mailed catalogs.)
4. Use the default password **changethisasap!** for all new accounts.
5. Click the **green Submit** button when finished.

If a customer does not have an email address, you will need to create a fake email address for them. See instructions for **Customers Who Do NOT Have an Email.

Customers With a Valid Email Address

Once the account is created, the customer must **verify their email** before an order can be entered:

1. The customer will receive an email from **Alison's Pantry** with a **VERIFY** button.
2. They must click it to activate the account.


Alison's Pantry®

Welcome to Alison's Pantry

Please click the button below to verify your email address:

VERIFY

After you have verified your email address you can log in when visiting our site by clicking Login or My Account at the top of every page, and then enter your e-mail address and password.
Username : **beckyp@alipantry.com**
Password : **Your Password**

Visit our store

If you have any questions, reply to this email or contact us at support@alisonspantry.com
This message was sent to beckyp@alipantry.com by **Alison's Pantry**
580 W State St., , Pleasant Grove, UT, 84062
801-796-6411

POWERED BY Zangerine

If you or the customer receives a message that the email or account already exists, contact your Sales Manager for assistance.

Resending the Verification Email

If the verification email is lost or deleted or the email was entered wrong when the account was created:

1. Have the customer visit www.alisonspantry.com.
2. Click **My Account** (top right corner).
3. Log in using the email address and password **changethisasap!**.
4. A message will appear:

   "Your email address has not been validated…"

5. Click **Resend Verification Email.**

   Remind the customer to check their **junk/spam folder** and search for "Alison's Pantry" if they don't see it.

Once verified, the customer can sign in and place an order—or you can place the order on their behalf.

Customers Who Do NOT Have an Email

If a customer does not have an email or won't give it to you, you can still create an account by using a **fake email** in the following format:

[firstname.lastname@alisonsreps.com] *Example: becky.price@alisonsreps.com*

NOTE: Do not create a fake email account for convenience. Accurate contact information for each customer is essential to building a strong Alison's Pantry business.

Important: You must include a **valid phone number** and a **complete mailing address** to create an account with a fake email.

After creating the account, send an email to support@alisonspantry.com and request that the customer's account is verified. Please include the customer's name. Once verified, you will be able to enter the customer's order in the system.

Enter Customer Orders

If a customer is unable or prefers not to place their own order, **you may enter it for them** through your **Rep Portal.**

Step 1: Access the Customer's Account

1. Log in to your **Rep Portal.**
2. Click **Customers** on the left menu.
3. Type the customer's name in the Search bar and then click on their name.
4. On the **Edit Customer Account** page, click the **orange "Create Order"** button (top right).

Note: If the button is still red, the customer's account has not been verified. Complete the verification process before proceeding.

IMPORTANT: Make sure you are in the correct customer's account before placing an order by checking that it says "My Account: Hi (customer's name)" at the top to the right of the AP logo.

Step 2: Add Items to the Order

1. Use the **Search bar** to enter a product name or item number, then press Enter.
2. Click **Add to Cart** (defaults to quantity 1).
3. To change the quantity, type the desired number in the **QTY** field or use the arrows.
4. Click the product name for details such as ingredients, nutritional information, or cooking instructions.
5. You can also browse categories under the **Shop** tab, though this is slower.

Out of Stock Items:

- Items with a **stock quantity of 0** will display a **"Notify Me"** button instead of "**Add to Cart."**
- If an item is on order, an **Expected Arrival Date** will be shown (estimated date/not guaranteed).
- Click "Notify Me" and enter your email address to be alerted when the item is back in stock.
- Keep track of which customer wanted an out of stock item so you can order it when there is more in stock.

Step 3: Review the Cart

1. Click **Cart** (top right) to view the full order.
2. To remove items: Click the red minus icon in the Action column.
3. To edit quantities: Adjust in the **QTY** field.
4. To add more items, click **Continue Shopping**.
5. When the order is correct, click **Proceed to Checkout.**

Step 4: Checkout

Verify the following:

1. **Drop Location**: Should list your name as the sales rep.
2. **Billing Address:** Should match the customer's payment method billing address.
    - Click **Edit Selected Billing Address** or **Add a New Address** if needed.
3. **Delivery Method:** AP Shipping (10% of subtotal).
4. **Confirm Order:** Review all items, quantities, shipping, and tax (Invoice tax fees only apply to Colorado customers).
    - Customers with a valid email will receive a confirmation email.
    - For fake email accounts, **you will give the customer their order total.**

Step 5: Payment Method

Alison's Pantry accepts two forms of payment:

1. **Credit/Debit Card:** Enter the cardholder's name, card number, expiration date, and CVV code.
2. **E-Check (ACH)**: Enter the bank routing number and account number.

> *You may enter multiple payment methods, but only one can be set as the **default payment**.*

Once payment details are entered, click **Proceed to Payment**. A **Thank You** screen will confirm the order and an order confirmation email is sent to the customer if they have a good email address on their account.

Close that screen and return to the **Customers** page to enter the next order.

> **Note:** Orders can be submitted at any time, but payments will not be processed until the **Friday after the order deadline closes.**

Important Reminders

- **Enter orders promptly**—don't wait until the last minute! Emergencies or technical issues can prevent timely entry.
- **Do not leave items in the cart for too long**—if an item sells out, it will be removed at processing.

- **Use your Rep Portal** to enter all customer orders.
    - **Do not log in as the customer.**
    - Portal access allows you to view commission progress, run reports, and manage customer accounts without logging in and out repeatedly.
    - Saves time and ensures better tracking of all orders.
- There is **a $1 hold** on the customer's funds when an order is placed, but it will be released before the order payment is processed.

Editing an Order

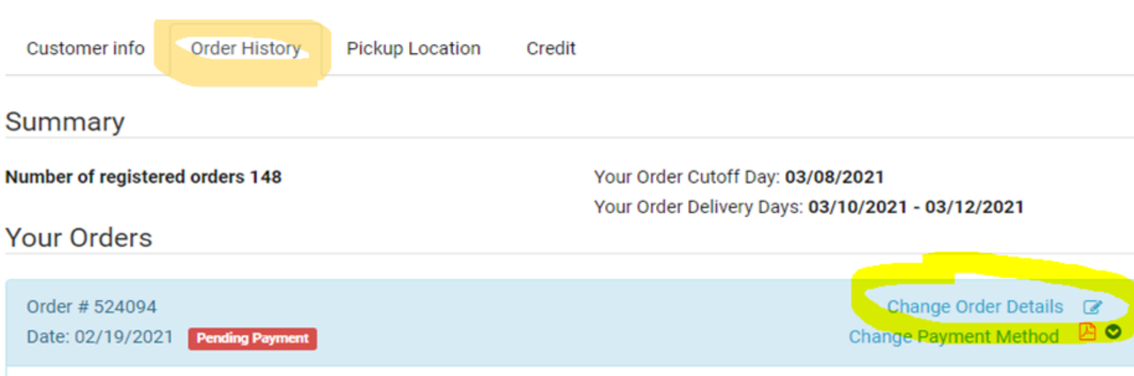
Customers and sales reps can edit orders until the order deadline closes at **midnight on Sunday**. Orders placed between midnight and Monday at 8 am can be edited until 8 am.

There is a video tutorial on this process: [How to Edit an Order]

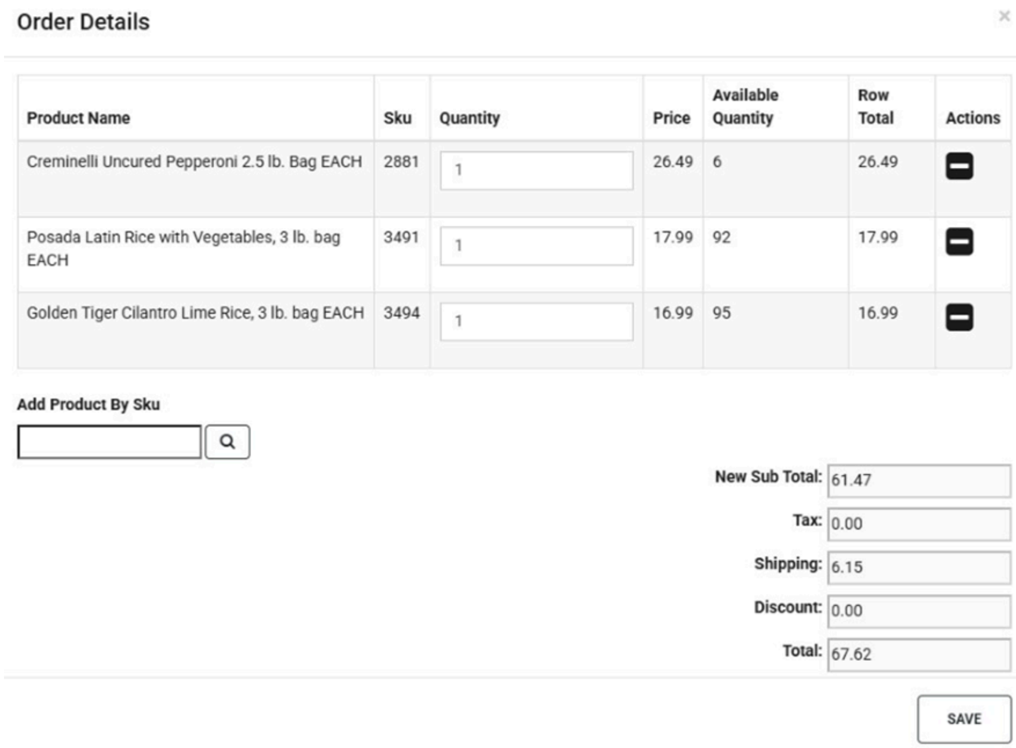
Steps to Edit an Existing Customer Order

1. **Log in** to your Rep Portal, select the customer, and click **"Create Order."**

2. Click **"My Account: Hi [Customer Name]"** at the top, then select the **Order History** tab.



3. Find the **Pending Payment** order you wish to edit and click **“Change Order Details.”**



4. In the pop-up window:
   - **Add an item:** Enter the item number in the **“Add Product By SKU”** box (bottom left), then press **Enter** or click the magnifying glass.
   - **Change quantity:** Click the quantity box, update the number.
   - **Remove an item:** Click the **black minus box** to the right of the item in the Actions column.

Click **SAVE** to apply all changes.

*If you do not want to save the changes, click the **X** in the upper right corner to close the window without saving.*

Deleting an Order

To delete an order, do Steps 1 - 3 in **Editing and Order** and then remove **all items** from the order by clicking on the **black minus box** to the right of each item, then click **SAVE.**

This creates a $0 invoice that will be removed after payments are processed for the current order.

Important Notes:

- Customers do **not** receive another notification email when changes are made to their order. If you edit an order, notify the customer of the updated total. You can:
  - Manually email the updated invoice through your Rep Portal, or
  - Text them a screenshot of the invoice or
  - Tell them their new total.

Frequently Asked Questions (FAQ)

<u>Can I split a case of product between customers on their order</u>?

No. The system only allows whole numbers when entering item quantities (e.g., 1, not 0.5). If customers wish to split a case, one customer must pay for the full case and coordinate reimbursement directly with the other.

<u>Can a sales rep split a case of product between customers</u>?

This requires caution and has important restrictions:

- **NEVER split meat products** (chicken, beef, pork, seafood, etc.).

  These items are federally inspected, and splitting them is considered "adulterating" the product. Doing so violates inspection regulations and could result in severe consequences for both the rep and Alison's Pantry. **Do not split meat products under any circumstances.**

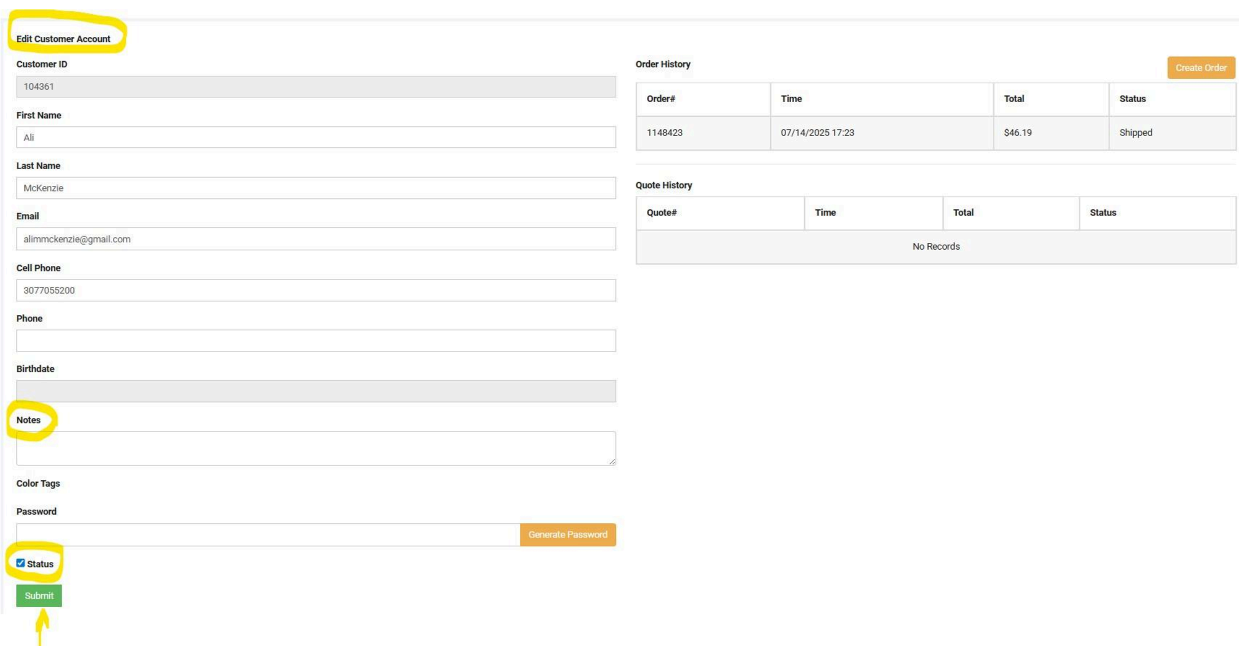
- **Non-meat products** can be split with care:
  - **Easy to split:** Items pre-packaged in separate bags (e.g., cases of prebagged product lik hash browns, individually wrapped snacks).
  - **Harder to split:** Bulk items in a single bag (e.g., cinnamon rolls, turnovers, cookie pucks) require handling raw product, which must be done hygienically.

If you choose to split a bulk item:

- Use **plastic gloves, face masks,** and **clean bags or containers.**
- Provide each customer with the full product information, including **ingredients, nutritional facts,** and **preparation instructions.**

How do I deactivate a customer account (e.g., deceased, moved, or no longer interested)?

1. First, ensure the customer is **not marked to receive a mailed catalog** (check the *Mailed Catalogs* page in your Rep Portal). If they are marked, click on the checkmark to UNMARK them, then go to the bottom of the list and click SAVE.
2. Go to the **Customers** page in your Rep Portal.
3. Select the customer's name to open their **Edit Customer Account** page.
4. In the **Notes** field, record the reason for deactivation (e.g., deceased, moved out of area, no contact, or no longer interested).
5. **Uncheck the Status box** (below the Password field). This will make the account inactive.
6. Click the **green SUBMIT** button to save the change.



The customer will no longer appear in your customer list, but the account remains in the system and is still linked to you. To reactivate the account in the future, send an email to support@alisonspantry.com. Tell them the customer's name and email and request that their account be reactivated.

Payments

When orders are entered online, customers are required to enter payment information at checkout to process the order and secure the items on their order. There will be a $1 hold put on that account to verify it is a good payment account, which will be released when the order payment is processed.

Accepted Payment Methods:

- Credit Card
- Debit Card
- Bank Account (ACH)

Note: Alison's Pantry can not accept EBT, SNAP, WIC, or food stamps.

When Are Payments Processed?

1. **Local Customers**

   Payments are processed on **Monday after the order closes** because local reps pick up orders from the warehouse later that week (Tuesday - Friday).

2. **All Other Customers**

   Payments are processed on the **Friday after the order closes**, with deliveries made the following week (unless delayed by a holiday).

Changing a Customer's Payment Method

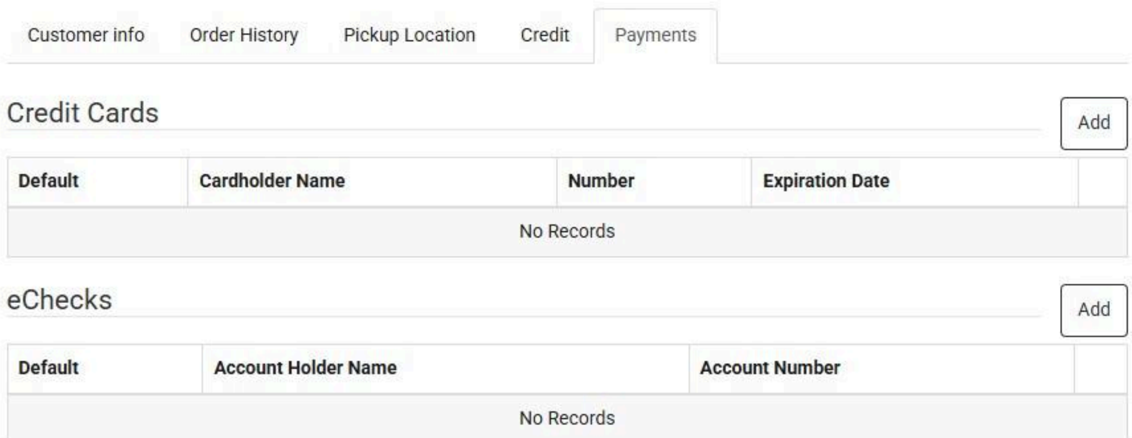
You or your customer can update payment details (e.g., a new credit/debit card or ACH info) if needed.

Steps to Update a Payment Method:

1. **Login to the Rep Portal**
   - Click on the **Customers** page.

- Select the customer's name and click "**Create Order**".

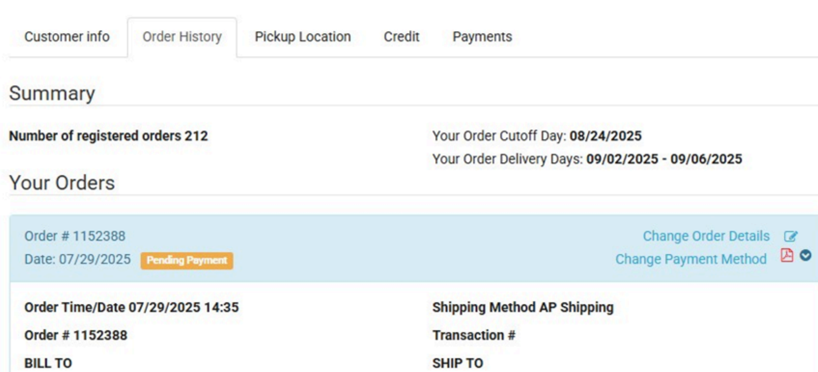
2. **Update Payment Info**
    - Click "**My Account: Hi [Customer Name]**"
    - Go to the **Payment** tab. Click ADD to the right of the new payment type you are entering. (Credit for credit and debit cards. ACH for bank accounts.)



    - Enter the **new card** or **bank info**.
    - Mark the new method as the **Default Payment**.

3. **Apply the New Payment to the Order**
    - Go to the **Order History** tab.
    - Locate the **most recent order** that shows **Pending Payment**.
    - Click "**Change Payment Method**".
    - Select "**Set Payment**" next to the updated payment option.

**If this is done BEFORE customer payments are run on Friday after the order closed, then no more needs to be done.



Declined Payments

In most cases, payments process successfully, and sales reps don't need to collect money. However, **declined payments** do happen and must be addressed.

There are several reasons a customer's payment may be declined, including:

- Insufficient funds
- Expired or outdated payment info
- Card or account flagged for fraud
- Incorrect account information

If a customer's payment is declined, the office will notify the sales rep through email and text that one or more of their customer payments have declined.

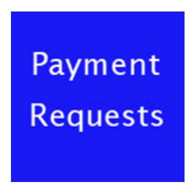
Protocol for Declined Payments

- **All orders** are shipped with your delivery, including declined payment orders.
- **Do not give the customer an order with a declined payment** until:
    1. The customer has submitted a new form of payment,
    2. A Payment Request Form has been submitted to the office, **and**
    3. The office confirms that the payment has cleared.

  All declined orders must be resolved within 10 calendar days of receiving your delivery.

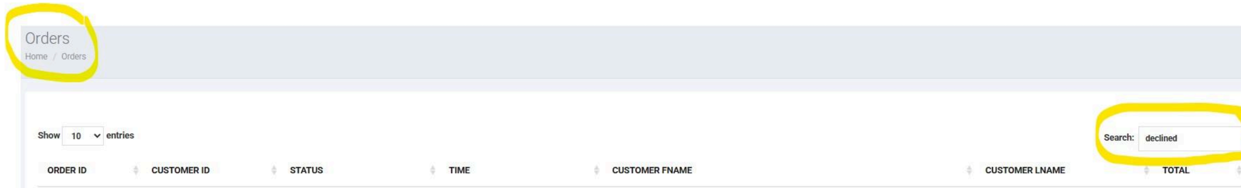
To notify the office of a payment resolution:

- Fill out the **Payment Requests** form on Pantry Academy. *(Found under the "Payment Requests" hotlink.)*



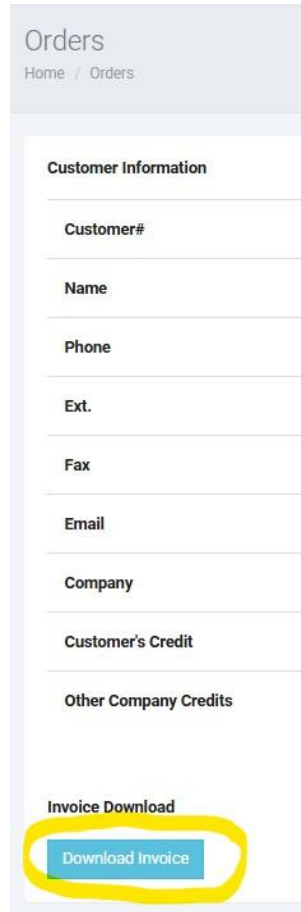
How to Identify Declined Orders

1. In your **Rep Portal**, got to the **Orders** page.
2. Type "**declined**" in the Search field to filter results.



To view the original payment method for the declined invoice:

- Click on the customer's account that shows declined.
- Click on the blue box "Download Invoice" in the bottom left corner of the page to open the **Invoice** for the customer.
- Scroll to the bottom of the invoice to view payment details.



Resolving Declined Payments

Payments are declined for a variety of reasons:

Credit Card—Declined

Notify the customer and request a new payment method (new card, ACH, or cash).

Insufficient Funds

The customer must:

- Deposit funds into their account for a retry, or
- Pay with a different credit card, or
- Pay you directly (cash, Venmo, PayPal)
- IMPORTANT: Do NOT accept a check as it may bounce also.

Other Bank Issues

If not due to insufficient funds, the customer should:

- Contact their bank to confirm **Alison's Pantry** was not flagged as fraud
- Clear the transaction with their bank
- Then, submit a **Payment Requests form** to tell the office to retry the payment

Expired Card

If the card has expired or was replaced:

- Enter the new card using the **Change Payment Method** steps listed in the *Payments* section.
- Then, submit a **Payment Requests form** to tell the office to run the new card.

Note: The ordering system **won't accept a card during its expiration month.**

eCheck (ACH) - Returned

If an eCheck is returned for insufficient funds:

- A **$5 Returned Check Fee** is added to the order.
- The customer must repay using a credit card, debit card, or cash.
- Submit a **Payment Requests form** to tell the office to run the new card.

Reminder

Every declined payment requires a **submitted Payment Request form**—this ensures the office knows the issue is being handled and can reprocess payment properly.

Important: The system does not automatically reprocess a newly entered payment. *You just submit the Payment Requests form after changing the payment method. Then, the office will reprocess the payment, and you will be notified of its status.*

If payment is not resolved, the **sales rep's bank account will be charged for the declined order **10 days after the last delivery day** for their route. This is called a **Net10 payment**.

To prevent this:

1. Update the payment method in the customer's account.
2. Change the payment method on the declined order to the new one.
3. Submit the **Payment Requests** form on Pantry Academy.

   *This must be completed by **3:00 pm on the Friday before** the payment is scheduled to be withdrawn from your bank account.*

Invoices

Printed invoices are very helpful when preparing customer orders for **pickup or delivery**. They serve as a packing checklist and official receipt for the customer. However, you can view them on an iPad or phone if you don't want to print them.

When to Print Invoices

- **Local reps**: Print after **Monday at 5:00 PM** (after payments have processed)
- **Delivered reps**: Print after **Friday at 5:00 PM** (after payments have processed)

Do not print invoices before payment is processed, as they will be incorrect. Check for the following before printing:

- **SHIPPED**—appears at the top right for paid orders.
- **Payment info**—shown at the bottom of paid invoices.
- **DECLINED**—appears at the top right if the customer's payment failed, and a balance is owed.

How to Print Invoices

1. Log into your **Rep Portal.**
2. Click on the **Reports** page (in the left-hand blue column).
3. Under **Sales Reports**, click **Download All Invoices Since Last Cutoff Date.**
4. In the drop-down menu labeled **Select Cut Off Date**, choose the desired catalog.
5. Click **Filter**. *You must click Filter or the data will not load.*
6. Click **Download Report** on the far right.
7. Invoices will open in a **PDF** format, ready for viewing or printing.

Note: If a customer placed multiple orders in the same catalog, each will generate a separate invoice.

Dry product will be highlighted in yellow.

Frozen product will be highlighted in white.

SKU	PRODUCT NAME / DESCRIPTION	QTY	PRICE	AMOUNT
1336	Mailed catalog (Group 2/Locals)	1	$0	$0
3701	Tucson Tamale Green Chile, Pork, & Cheese Tamales, 5 oz. / 8 ct. CASE	1	$27.49	$27.49
Subtotal:				$27.49

Commissions & Net 10 Report

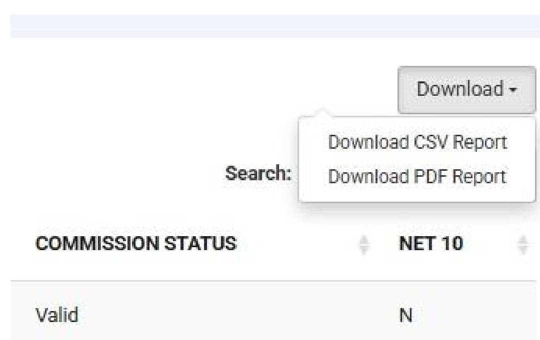
The **Commissions & Net 10 Report** provides a summary of:

- All customers who placed an order for that catalog.
- Any **declined orders** that require follow-up.
- The **total amount** you may need in your bank account to cover declined payments.
- Your **earned commission** for that catalog.

How to Access and Print the Report

1. **Log in** to your **Rep Portal**.
2. Click on the **Reports** page (left-side blue column).
3. Under **Sales Reports**, click on **Commissions & Net 10**.
4. Click on **Select Cut Off Date**.
5. Choose the catalog and group (e.g., *2026 Catalog #4 Group 2*).
    - *You will only see reports for your assigned group.*

6. Click the **Filter** button.
    - *You must click **Filter** to load the correct data.*
7. Click **Download** on the right side of the screen.
8. Choose your preferred format:
    - **CSV Report**—Opens in Excel, allows sorting and customization.
    - **PDF Report**—Fixed layout, easy to read and print.



*Click on the printer icon in the upper right corner to print the report.

Commissions

Order Minimums

To **earn commission**, a sales rep must have at least **$750 in product subtotal** per catalog order. If your order total falls **below $750**:

1. Your order will still be processed and delivered to you.
2. **No commission** will be paid on that order.

Commission Levels

Commission is based on the **product subtotal** for each catalog's sales (before shipping and sales tax are added).

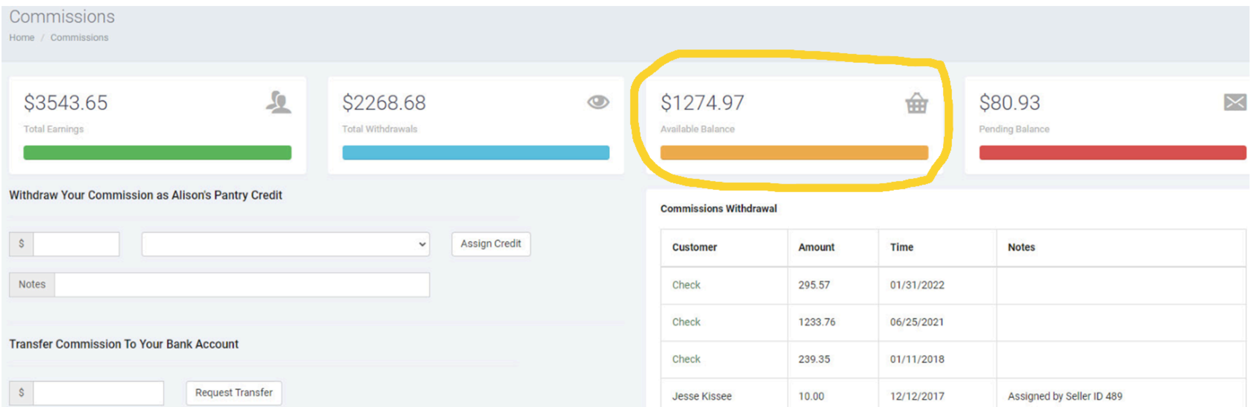
Sales Range	Commission Rate
$750 - $999	10%
$1,000 - $1,999	14%
$2,000 - $2,999	15%
$3,000 - $3,999	16%
$4,000 - $4,999	17%
$5,000 - $6,999	18%
$7,000 - $9,999	19%
$10,000 and above	20%

Accessing Your Commission

Commission becomes available in your **Rep Portal** on the **Monday after your order closes and payments are processed.**

To view your available balance:

1. Log into your **Rep Portal**.
2. Click on the **Withdrawals** page.
3. Look for your balance in the box with the orange line labeled **"Available Balance".**



Ways to Use Your Commission

You can use your commission in several ways:

Leave It in Your Rep Account

Many sales reps choose to let their commission accumulate over time. This can be a great way to save for vacations, holiday expenses, home improvements, or business growth opportunities.

Your funds remain secure in your account and available whenever you need them.

Apply Commission to Your Own Order

Use commission to pay for personal or business-related orders.

__Steps__:

1. Go to the **Withdrawals** page (refer to the picture above).
2. Under **"Withdraw Your Commission as Alison's Pantry Credit**," click the **dollar sign ($)** box and enter the amount to apply.
3. Click the next box to the right and select your name (or business account) from the drop-down box.
4. In the **"notes"** box, record the purpose of the credit (recommended for tax documentation).
    - *Personal use = not tax-deductible*
    - *Business expenses = tax-deductible*
5. Click **"Assign Credit"**, confirm with **"YES,"** then click **"OK."**

*If you make a mistake, contact the **Sales Manager** for help.*

Give a Credit to a Customer

Use commission to reward or incentivize customers (e.g., referral bonuses, contest winners, or special order discounts).

__Steps__:

1. Go to the **Withdrawals** page (refer to the picture above).
2. Under **"Withdraw Your Commission as Alison's Pantry Credit,"** click the **dollar sign ($)** box and enter the credit amount.
3. Click the next box to the right and select the customer's name from the drop-down box.
4. Add a note in the **"Notes"** box explaining the reason for the credit (recommended for your records and tax tracking).

   * *Credits used for customer promotions or business growth are tax-deductible.*

5. Click **"Assign Credit",** confirm with **"YES,"** then click **"OK."**

Transfer Commission to Your Bank Account

Withdraw funds for personal use or business needs.

Steps:

1. Go to the **Withdrawals** page.
2. Under **"Transfer Commission To Your Bank Account,"** click the **dollar sign ($)** box and enter the amount to transfer (up to the available balance).
3. Click **"Request Transfer."** A confirmation message will appear.
4. Click **"OK"** to complete.

   *Transfers take **2-3 business days** to reflect in your bank account.*

Important Reminders:

If you use the **Catalog Mailing Service**, be sure to leave **enough commission in your account** to cover those charges. If insufficient funds are available, the balance will need to be paid through another payment method.

Delivery

Submitting or Updating Delivery Directions

When you become a sales rep, you provided delivery directions for the truck to drop off your monthly orders. If you need to **change your delivery location**, updated directions must be submitted to the office (support@alisonspantry.com) **by the order deadline** of the catalog cycle you want the change to take effect.

Required Delivery Directions

Please provide the following:

1. **Your full name and physical delivery address**

   (e.g., Alison's Pantry, 80 West State St., Pleasant Grove, UT 84062)

2. **A clear written description** including:
   - Major roads, highway numbers, street names

- Mileage, mile markers, or landmarks
- Any special instructions to help the driver find your location

Example: "From I-15 South, take Exit #379 and turn left. Go 3.5 miles and turn left on Sunset Blvd. After two stoplights, turn right on Evergreen. Our house is #580 on the right—green with purple trim."

Important: All unloading is done from the **right side of the truck and the back.** Be sure your location is accessible from the **right side** as the truck approaches.

Truck Access & Safety Requirements

Due to the size of semi-trailers, the following rules apply:

- **Private Property:** Not recommended. A **release waiver** must be signed if delivery occurs on private property.
- **Dead Ends & Cul-de-sacs:** Trucks cannot enter these or back up. You must meet the truck at an accessible location nearby.
- **Road Type:**
  - Paved roads are preferred
  - **Gravel roads** must be firmly packed and no more than **1 mile round trip**
  - **No dirt roads**—especially in wet conditions. Tow services for stuck trucks are extremely costly and must be avoided.

Reminder

The directions you provide are the **only guidance the driver has** to locate your delivery location the first time they deliver to you. Please be thorough, accurate, and prompt when submitting or updating your delivery instructions.

Delivery Schedules

Your delivery schedule will be available on **Tuesday** after your group's order closes each month. You will receive a **text and email notification** with a link to the Delivery Schedules page. You can also access it on Pantry Academy by clicking on the Delivery Schedules hotlink.

To View Your Schedule:

1. Click the link in your notification.
2. Select your **Group** and **Route**.
3. View your **delivery day, approximate time,** and **delivery town** for the following week.
4. **Mark the delivery day and time on your calendar** so you're prepared.

Delivery Day Expectations

- Be available **30 minutes before and after** your scheduled delivery time to allow for any adjustments.
- The **driver will text you** about 1 hour before your delivery time so you can prepare for your delivery.
- While we aim to keep delivery times consistent each month, **schedules are subject to change** due to:
    - Route changes (drops added or removed)
    - Weather conditions
    - Road conditions (road construction)
    - Mechanical issues (flat tires, needed repairs)

If changes are made, a **revised schedule** will be posted and you'll be notified via **email and text.**

Please keep your cell phone with you on delivery day so we can reach you if your delivery time changes.

If You Aren't Available for Delivery

If you're unavailable to meet the truck:

- Arrange for a **trusted person** to receive your delivery.
- Let the **Sales Manager** know who will get your delivery and their contact information if you can't be reached in case of a change in the schedule.

Being prepared ensures a smooth delivery for both you and the driver.

Before-Delivery Checklist

To ensure a smooth and efficient delivery day, complete the following steps **before the truck arrives:**

1. **Check Freezer Temps -** Ensure all freezers are turned on and set to **0°F** to keep frozen items at safe temperatures.
2. **Print & Review Customer Invoices -** Identify orders with items that need immediate attention, such as:
    - **Frozen treats** or small frozen items (prone to quick melting)
    - **Chocolate items** (sensitive to heat)
3. **Print Your Commission & Net10 Report -** This report helps you track:
    - Who ordered
    - Any declined payments
    - Your commission earned

    (See the "Commission & Net 10 Report" section for detailed instructions.)

4. **Prepare Handouts (Optional) -** If you create a **customer newsletter, product flyer**, or **event invitation**, have printed copies ready to distribute with orders.
5. **Tidy Your Pickup Area or Delivery Vehicle**
    - If customers are picking up from your home/garage, make sure the area is **clean and welcoming.**
    - If you deliver, ensure your **vehicle is clean inside and out**—it leaves a positive impression for both you and Alison's Pantry.

When the Delivery Truck Arrives

You will have approximately **15 minutes** to unload your entire order so the driver can stay on schedule for the next delivery.

To Keep the Process Efficient:

- If you have a **large order**, plan ahead and **have help available.**
- Lay out a **tarp** or have a **vehicle ready** to hold your entire order.
    - This keeps the unloading area organized and prevents delays from walking product inside.

Once your full order is off the truck, the **driver will leave**, and you can begin sorting and preparing orders for your customers.

Your Responsibility

As the sales rep, you are responsible for the **condition of customer orders** from the time the truck delivers them to you until the customer receives them from you.

- **Frozen items** must remain frozen.
- **Dry items** must be stored in a **cool, dry location.**
- If damage occurs while orders are in your care, **you are responsible for replacing the product**.

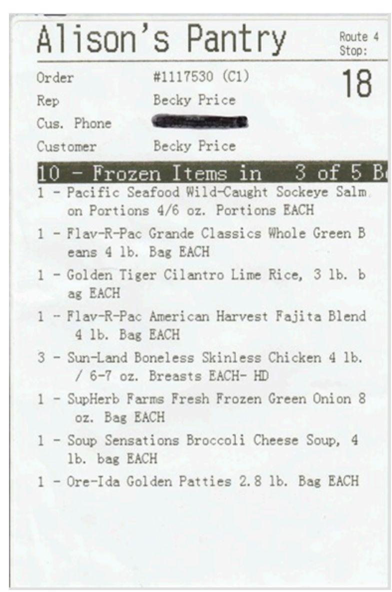
Summer Reminder

High temperatures can cause frozen items to thaw and chocolate items to melt **very quickly.** Have **Plenty of help** ready to:

- Move products into freezers immediately.
- Deliver or organize orders quickly to avoid damage.

Proper storage and fast handling protect your customers' orders and your reputation as a reliable sales rep.

Your Order–Pick by Customer


Alison's Pantry
Route 4
Stop:
18
Order #1117530 (C1)
Rep Becky Price
Cus. Phone [redacted]
Customer Becky Price
10 - Frozen Items in 3 of 5 B
1 - Pacific Seafood Wild-Caught Sockeye Salmon Portions 4/6 oz. Portions EACH
1 - Flav-R-Pac Grande Classics Whole Green Beans 4 lb. Bag EACH
1 - Golden Tiger Cilantro Lime Rice, 3 lb. bag EACH
1 - Flav-R-Pac American Harvest Fajita Blend 4 lb. Bag EACH
3 - Sun-Land Boneless Skinless Chicken 4 lb. / 6-7 oz. Breasts EACH- HD
1 - SupHerb Farms Fresh Frozen Green Onion 8 oz. Bag EACH
1 - Soup Sensations Broccoli Cheese Soup, 4 lb. bag EACH
1 - Ore-Ida Golden Patties 2.8 lb. Bag EACH

When your order arrives, **all customer orders will be bagged and labeled (including large item boxes)** for easier sorting and distribution, and will include the next month's catalog. Dry items will be separate from frozen items.

Each label includes:

- **Order number**
- **Sales rep's name** and **Stop #**

- Customer’s name and phone number
- Whether the items are **Dry**, **Frozen**, or **Both**
- **Box/bag count** for each type. Dry count for dry items and frozen count for frozen items.
- A detailed list of ordered items on the corresponding label (unless the order is too large, in which case use the invoice to verify)

This system makes it easy to identify and sort customer orders quickly and accurately.

Prepare Customer Orders

Once your order has been delivered, take the following steps to prepare your customers’ orders for pickup or delivery.

If Delivering or Offering Pickup Immediately:

- Use the **labels** to gather each customer’s **dry and/or frozen items**. The labels indicate the number of dry and frozen boxes/bags per customer.
- If not already done, **notify customers** that their orders are ready for pickup or delivery.

If Pickup/Delivery Will Happen Later:

- **Store frozen items** in a freezer right away to prevent thawing.
- **Store dry items** in a cool, dry place to protect them from heat or moisture.
- **Organize orders** by customer for quick access when it’s time to deliver or distribute.

Additional Items to Include (Optional):

- Contest prizes or product samples
- Customer invoices
- Monthly newsletters or handouts

These can be placed with the customer’s **dry items** or kept in a **designated area** for easy access when the customer arrives or during delivery.

Customer Pickup or Delivery Times

How you choose to get orders to your customers each month is up to you. You may:

- **Offer order pickup at your home or designated location**
- **Personally deliver orders** (a great customer service, but not required)

Best Practices for Home Pickup

If you offer pickup from your home or other location:

- Provide **specific days and time windows** when you'll be available.
- Ask customers to **confirm their pickup time** so you can be ready.
- Avoid offering open, all-day pickups—this can tie up your entire day and lead to uncertainty.
- Setting defined pickup times often leads to **faster pickups and fewer missed orders.**

Timely Delivery

- **Ideally,** orders should be picked up or delivered the **same day** they arrive.
- **All orders must be delivered or picked up within 7 days** of your delivery date.
- Timely distribution ensures product quality and a smooth customer experience.

Samples

Offering product samples at customer pickup is a powerful way to increase future sales. When customers get to **taste or try something new**, they're more likely to order it next time—especially if they enjoyed it!

> ***Don't forget:*** *Follow up before the next order deadline to remind customers about what you sampled and encourage them to order it!*

Best Practices for Sampling

- **Sample items we sell regularly** so customers can reorder at any time.
- Use **seasonal samples** when you want to create urgency (limited availability).

Easy-to-Sample Ideas:

- **Prepackaged items** (e.g., string cheese, granola bars, snack packs)
- **Dry goods** (e.g., trail mixes, candies, or spices served in small cups or bags)
- **Bakery mixes** (e.g., muffins, cookies, brownies—bake ahead and share)
- **Soups and rolls** (heat and serve at pickup)

  Tip: Order sampling products a month in advance so you're prepared before delivery day.

Tax Tips & Ordering Samples

Items purchased for sampling are **business expenses** and are **tax-deductible.** To track them separately:

- Create a **dedicated business customer account**, or
- Place a **separate invoice** when ordering business-use items (samples, contest prize, extra catalogs, etc.)

You can also search the website for "**REP ONLY**" items like **sample cups and bags** to make your sampling easier and more professional.

Need Ideas?

Visit Pantry Academy, click on **Growing My Business**, then **Sampling** for inspiration and creative tips on how to make sampling work for your business!

Product Issues

Reporting Product Issues

While our warehouse aims for 100% accuracy, occasional order issues can occur. To ensure prompt resolution and accurate reporting, **ALL issues** must be reported to the office by submitting a **Product Issues Form** found under the **Product Issues** hotlink on Pantry Academy.

Extra Products

Extra products are items received that were **not ordered** and do **not appear on any customer invoice.**

What To Do:

1. **Contact Nearby Reps**
    - Call the **2 sales reps before and after you** on the delivery schedule to ask if they are missing that item.
    - **Phone calls are preferred** to avoid delays from unread texts or emails.
2. **If the Extra Item Belongs to a Nearby Rep:**
    - Arrange to **meet and return the item** (if possible).
    - Submit the **Extra Products form** under the **Product Issues** hotlink on Pantry Academy.
    - This helps the office track performance and improve accuracy.
3. **If the Owner Cannot Be Identified or the Rep It Belongs to is Too Far Away:**
    - Submit the **Extra Products form** with all known details.
    - **Try to sell the item** (customers who purchase extra products receive **FREE shipping** on that item). *You can sell it to anyone or purchase it yourself.

    ****We do not return any items on the truck**. Contact the Sales Manager for further instructions if you are unable to sell an Extra Product.

Shorted Products

Shorted products are items that appear on a customer's invoice but were **not included** in your delivery.

What to Do:

1. **Contact Nearby Reps**
    - Call the **2 sales reps before and after you** on the delivery schedule to ask if they received your missing item.
    - **Phone calls are recommended** to avoid delays from unread messages.
2. **If the Item Is Located and Can Be Retrieved:**
    - Coordinate with the rep to **pick up the item** if they are close enough.
    - Then, go to **Pantry Academy**, click the **Product Issues hotlink**, and submit a **Shorted Products Form.**
3. **If the Item Can't be Located or Retrieved:**
    - Submit the **Shorted Products Form** through the Product Issues hotlink on Pantry Academy.
    - The **customer will receive a credit** for the missing item.
    - You or the customer must **manually reorder the item** on the next order cycle.

Shorted items are not automatically reordered by the system.

Damaged Products

Damaged products include any item that arrives in poor condition, such as:

- Broken packaging or containers
- Holes in bags (with or without product spilled)
- Crushed boxes that damage the product inside
- Moldy or expired items

How to Report Damaged Items

1. Go to **Pantry Academy**, and click the **Product Issues hotlink**
2. Fill out the **Damaged Products Form**
3. **Email a photo** of the damaged item to support@alisonspantry.com.
4. Based on the damage type and severity, the office will:
    - Issue a **credit** to the customer's account, or
    - Approve a **discount** for the item

*If a credit is issued, the customer (or rep) must **manually reorder** the item on the next order. Replacement items are not automatically reordered.*

Important Responsibility Notice

Any product damaged **while it is in your care** is your responsibility to replace. This includes, but is not limited to:

- Failing to freeze items promptly
- Accidental cuts or spills while opening boxes
- Dropped items during handling
- Chocolate items melting due to improper storage in hot weather

Product Returns

A **Product Return** refers to any product a customer has purchased, tried, and found unsatisfactory—for reasons such as taste, texture, appearance, smell, or performance.

Refund Types

Double Your Money Back Guarantee

- Applies to **most food items**
- Request must be submitted **within 90 days** of purchase
- Customer receives **2x the product cost** as a credit (*Shipping and sales tax are not refunded)*

Standard Money Back Guarantee

- Applies to all eligible items **between 91 and 180 days** after purchase
- Customer receives **100% refund** (product cost + applicable sales tax + shipping)

Exclusions from Double Refunds

The following items are only eligible for a **100% refund** (not double), if returned within 6 months:

- **Hot Deals**
- **Pantry Bargains**

- **#2 (second-quality) products**
- **Non-food items**

  NOTE: Refunds must be requested within 6 months of the purchase date.

How to Submit a Return

1. Go to **Pantry Academy**, click on the **Product Issues** hotlink.
2. Fill out the **Product Returns form** with a **detailed reason** for the return.

   "Dissatisfied" is not sufficient—please explain what was wrong (e.g., taste was too salty, smelled off, texture was gritty, couldn't get the lid on, etc.)

3. If the issue is visual (e.g., poor appearance or spoilage):
   - Email a **photo** and **any dates or packaging codes** to support@alisonspantry.com.

Communicate With Customers

Maintaining regular contact with your customers is key to building strong relationships and consistent sales. It's important to reach out to **every customer at least once a month**—beyond just order deadline reminders.

Ways to Stay Connected

Here are effective and meaningful ways to communicate throughout the month:

- **Email the Closeout List**

  Help customers save by sharing discounted items that are being discontinued or removed from the catalog.

- **Share Hot Deals**

  Send a quick text or email when limited-quantity Hot Deals are released so they don't miss out.

- **Say Thank You**

  Send a handwritten note, text, or email to express appreciation for their continued business.

- **Welcome New Customers**

  Send a thank-you note or follow-up call to ensure they're satisfied with their first order.

- **Share Helpful Content**

  Send recipes, meal ideas, or product spotlights—this keeps Alison's Pantry top of mind and adds value.

  Tip: Use the Thursday marketing emails for ready-to-share content!

- **Celebrate Personal Milestones**

  Mail or message a birthday, anniversary, get well, or congratulations card.

  Even liking or commenting on their social media posts helps build meaningful connections.

These small, thoughtful touches show your customers that you care—and they're more likely to become loyal, repeat buyers.

Freezer Care & Maintenance

Freezers are an essential part of your Alison's Pantry business. Proper care ensures safe storage of frozen items and prolongs the life of your equipment. Always refer to your **owner's manual** for model-specific instructions.

For general freezer care tips, visit: Freezer Maintenance Guide on Pantry Academy

Frequently Asked Questions

<u>Can I leave my freezer on when empty</u>?

- **Yes**—this is a personal preference.
- If you turn it **off**, leave the **door slightly open** to allow ventilation and prevent odors/mold.
- When turning it **back on**, allow **at least 4 hours** to fully cool before adding food.
- If left **on**, place a few **jugs of water** inside to help maintain a stable temperature.

<u>Can I plug my freezer into an extension cord</u>?

- **Best practice:** Plug directly into a **grounded electrical outlet.**
- Manufacturer guidelines (e.g., Sears Kenmore) recommend **not using extension cords.**
- If an extension cord is absolutely necessary:
    - Use a **14-gauge, three-prong extension cord**
    - Must be **under 50 feet** and **rated for the freezer's amperage/wattage**

  *Insufficient power can damage the **compressor**, so use caution.*

<u>Where is the best place to put a freezer</u>?

- Place in the **coolest part of the room**, away from:
    - Heat-producing appliances
    - Heating vents or ducts
    - Direct sunlight
- Ensure **room temperature stays below 110°F**
- Allow at least **3 inches of space on all sides** for proper airflow

Changing a Sales Rep's Address

If you move or your physical address changes, follow these steps to ensure your records and deliveries are updated properly:

1. **Notify the Office**

- Send an email to support@alisonspantry.com with your **new physical address.**
- If this will also be your **new delivery location**, be sure to include **updated delivery directions** for the truck driver.

(See "Delivery Directions" for guidance on how to format delivery instructions.)

2. **Update Your Address in the Rep Portal**
   - Log in to your **Rep Portal**
   - Update your **physical address** under your **personal account**

This will automatically update the **shipping address** on your customers' accounts going forward. **Note:** Any **pending invoices** for orders already placed will **not be updated.** All future orders will reflect the new address.

Growing Your Business

"Loyalty is when people are willing to turn down a better product

or price to continue doing business with **you**."

Simon Sinek

Best Practices for Sales Reps–What Successful Sales Reps Do

Treat Alison's Pantry Like a Business

Set dedicated work times for your business. Waiting until you're free or "have time" often results in important tasks being missed. Follow the **Rep Monthly Calendar** on the Catalog Resource Page to stay consistent. Also read: Do You Have a Business or a Hobby?

Focus on Who You Know

Complete the *"Who Do You Know"* worksheet to identify potential customers. Always give catalogs to people you can follow up with—random drop-offs rarely lead to orders. A personal connection makes all the difference.

Distribute Catalogs Early

Customers need time to browse and plan their orders. Deliver catalogs well before the order deadline—waiting until the week of the order is too late.

Communicate Through Email & Text

Organize customer contacts into email and text groups to streamline communication. Send reminders and important updates consistently via email and text. Encourage customers to subscribe to company emails and reminder texts at www.alisonspantry.com.

Do Reminder Phone Calls

Customers often intend to order but forget. If other reminders haven't worked, a quick phone call can make the difference and show excellent customer service.

Use Social Media

Create a Facebook group or page to promote Alison's Pantry. Share product highlights, recipes, Hot Deals, contests, and winner announcements. Regular posts keep your customers engaged and informed.

Offer Contests and Incentives

Everyone loves free products! Run contests or offer small incentives to boost sales and attract new customers. Also read: Grow Your AP Business With Contests

Know and Use the Products

Successful reps are also loyal customers. It's much easier to sell what you know, love, and use in your own home.

Upsell Smartly

Offer suggestions that complement their order. For example, if they buy a spice, ask if they need a spice jar. These small add-ons build trust and increase sales.

Ask for Customer Referrals

Don't rely solely on word of mouth—ask directly for referrals. Offer a small reward for each new customer someone refers to you. Happy customers are your best promoters! Also read: Finding New Customers Through Referrals

Get Organized and Stay Organized

Keep all your business paperwork filed in a system that works for you. One helpful method is to create a folder for each month. In each folder, include a hard copy of the catalog, your Commissions & Net 10 report, paper orders from customers, and receipts for business expenses (e.g., paper, ink, catalog mailings, samples, contest prizes). Staying organized will help you track your progress, manage expenses, and run your business more efficiently.

Keep Customer Records Updated in the Rep Portal

Make sure all customer information—addresses, phone numbers, and email addresses—is current and complete in the Rep Portal. This makes it easier to contact your customers and ensures their information is safely stored online. If your computer ever crashes or you lose personal files, you'll still have access to everything through the portal.

Great Customer Service

Providing excellent customer service helps build loyalty, increase repeat orders, and grow your Alison's Pantry business. Here are key habits of successful reps who deliver exceptional service:

- **Respond promptly** to customer questions—ideally within **24 hours**
- **Confirm all orders** are submitted and check for **duplicate entries**
- **Express gratitude** by thanking customers through:
    - Text messages
    - Facebook posts or comments
    - Emails
    - Handwritten notes (in the mail or included with their order)
- **Offer samples** at order pickup to introduce new products
- **Follow up with new customers** to ensure satisfaction and remind them of our **product guarantee**
- **Add new customers** to your:
    - Facebook group or business page
    - Email contact list
    - Cell phone contacts for text reminders

Consistently applying these practices shows your customers they're valued—and keeps Alison's Pantry top of mind.

Taxes and Deductions

As an Alison's Pantry sales rep, you are considered **self-employed** and are responsible for filing **self-employment taxes** each year using a **Schedule C**.

Common Business Expense Deductions

You may be able to deduct the following business-related expenses:

- Telephone or cell phone service
- Internet service
- Catalog mailing costs
- Office Supplies (paper, ink, tape, etc.)
- Food samples
- Computer and software expenses
- Freezers used for temporary order storage
- Mileage for:
    - Meeting the delivery truck
    - Delivering catalogs or orders
    - Picking up supplies

    *(Use the **Mileage Log** at the end of this manual to track business miles)*

- Gifts and prizes for referrals, contests, and customer appreciation
- Restaurant meals and entertainment (50% deductible if business is discussed)

Hiring Your Children (Optional)

According to *Bernard B. Kamoroff, CPA* in *422 Tax Deductions for Business and the Self-Employed Individual*, you may legally hire your school-age children to perform real jobs for your business and pay them wages (e.g., up to $6,300/year—check with your tax advisor for current limits).

- Their wages are deductible as a business expense.
- They may not be required to file a tax return depending on income.

Important: Alison's Pantry is not a tax advisor. Please consult your **tax advisor or accountant** for current and personalized guidance.

Tax Forms and Recordkeeping

- Reps will receive a **1099 NEC form** each January showing total commission earned for the previous year.
- **Accurate recordkeeping is essential** for proper tax filing and business tracking.

Maintaining good financial records and understanding your eligible deductions can significantly benefit your business.

Rep Etiquette

At Alison's Pantry, we value integrity, professionalism, and respect among our sales reps. Maintaining proper business etiquette is essential to creating a positive experience for both customers and fellow reps.

The Sales Reps' Golden Rule

Do not take customers from another sales rep.

- Never create a new rep account for someone already assigned to another rep, even with a fake email.
- If a customer wishes to switch reps, **they must contact the office directly** to request the change at support@alisonspantry.com. This keeps their order history and account information intact.

Growing Your Customer Base

You are encouraged to grow your business both **within your town** and in **nearby areas**—as long as orders can be safely delivered (especially frozen items).

- There are **no territorial restrictions**, but please be respectful of other reps already serving nearby towns.
- If you're advertising in a town that already has an active rep, be mindful and courteous in your approach.

Proper Advertising Etiquette

When advertising in shared or neighboring areas:

Say this:

> "I'm an Alison's Pantry sales rep. If you'd like a FREE catalog, contact me at [phone/email]."
>
> "There's another Alison's Pantry sales rep in [town}! Contact [rep name] for a FREE catalog."

Avoid saying:

> "I'm the sales rep for [town}" (unless you truly are and no other reps serve that town).
>
>> Instead say: "I live in [your town] and I'm looking for new customers in [different town]".

When Talking to Potential Customers

Always ask:

"Have you ordered from Alison's Pantry before?

If yes, ask:

> "Do you remember who your rep was?"
>
> "When was the last time you ordered?"
>
>> ***If they've ordered from another rep **within the last 6 months**, they need to continue ordering from that rep.*

We **do not tolerate customer poaching.** Respect others as you would want to be respected.

Exceptions to the Rule

- **Family, close friends, or neighbors** who wish to switch to you must **personally contact the Sales Manager** to request the change.
- If a customer is **unhappy with their current rep**, notify the **Sales Manager**. This helps us address the issue and prevent further customer loss for that rep, even if the customer decides to switch.

Social Media Etiquette

Facebook is a great marketing tool—but be respectful:

- **Do NOT comment** on another rep's post with your own contact information.
- **Create your own ad or post** to promote your business.

In Summary

- Be professional and courteous to other reps.
- Always verify customer history before accepting new orders.
- Let the Sales Manager handle rep changes.
- Use good judgment in your advertising and outreach.

We're all part of the same team—let's grow our businesses while supporting each other!

AP Rep Mileage Log for 20___

Beginning Odometer for Vehicle: _______________

Anything business related can be claimed on taxes but you must have a written record.

Date	Beginning Odometer	Ending Odometer	Where I went	What I was doing	Total Round Trip Miles

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