

# DIRECT SALES ORDER GUIDE

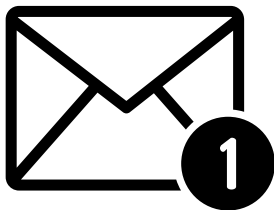
At L.O.V.E. Restaurant Group, our commitment to delivering unparalleled service extends beyond our stores. As we ramp up our direct sales efforts, it is essential to have a structured, professional, and easy-to-follow process. This guide is designed to provide our team with a clear roadmap on how to **efficiently** and **accurately** take **direct sales** orders through various channels. Adherence to these steps will ensure consistency in service and enhance customer satisfaction.

## Step 1: Establish a Direct Sales Connection.

## Step 2: Accept the Order. Orders can be received via:

- JotForm (Digital Menu)
- Order Form (Email, Text, Fax)
- Phone Call
- Slim Chickens Website

*Choose the applicable method below and follow the corresponding steps:*



### JotForm Process:

1. Upon receiving an order through email confirmation, promptly **forward** it to the respective store.
2. **Proceed to Step 3.**

**Note:** Orders via the Slim Chickens Online Order Website fall outside our control but may still channel through direct sales.



### Order Form Process:

1. Obtain the order through specified medium.
2. Open the **JotForm Menu** and **manually input** the order details.
3. After submitting on JotForm, you'll receive a confirmation email. **Forward** this to the designated store.
4. **Proceed to Step 3.**

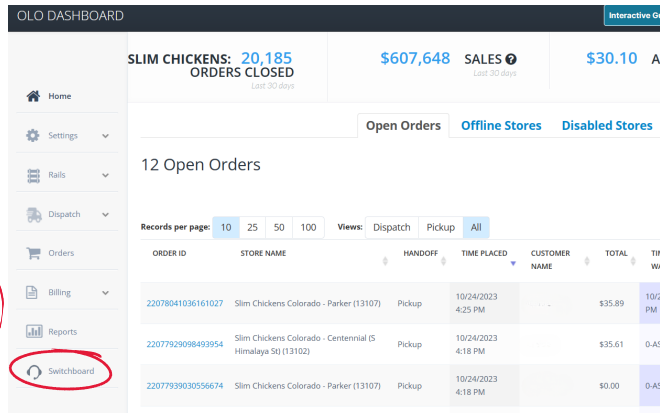


### Direct Phone Call Process:

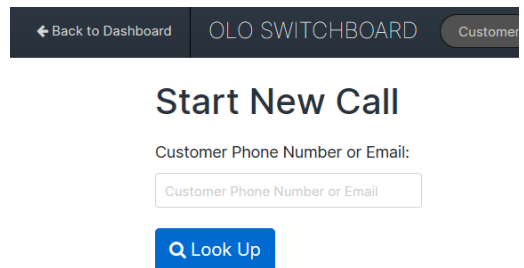
1. Record order details during the call.
2. **Proceed to Step 3:** input order, capture details, and secure payment.
3. **After completing the order in OLO Dashboard, register it in JotForm Menu for tracking and contact purposes.**
4. Forward JotForm confirmation email to the relevant store post-submission.

## Step 3: Process the Order using the Online OLO Dashboard

1. Access the OLO Dashboard.
2. Navigate to "Switchboard" on the left tab.
3. Enter the email associated with the customer in the "Start New Call" section.
  - a. If new, complete the "Booking Customer" section.
  - b. If returning, select and verify the account.

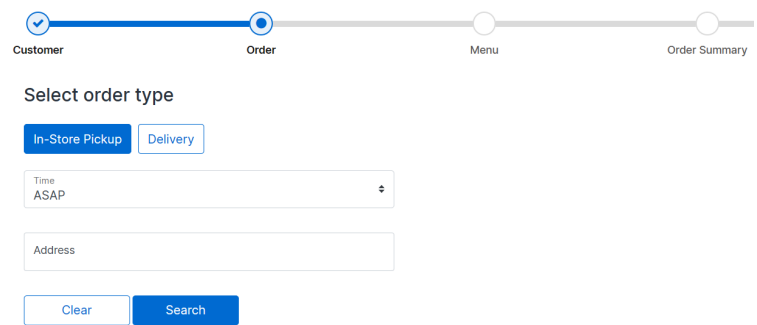


The screenshot shows the OLO DASHBOARD with the left sidebar containing various navigation options. The 'Switchboard' option is highlighted with a red circle and the number 2.



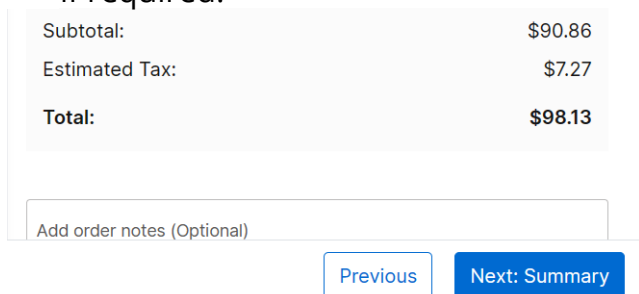
The 'Start New Call' section includes a form for 'Customer Phone Number or Email' and a 'Look Up' button. A red circle with the number 3 is next to the form.

4. Navigate to "Order", then:
  - a. Specify "Order Type" (delivery method & time).
  - b. Indicate "Ordering From" (store location).



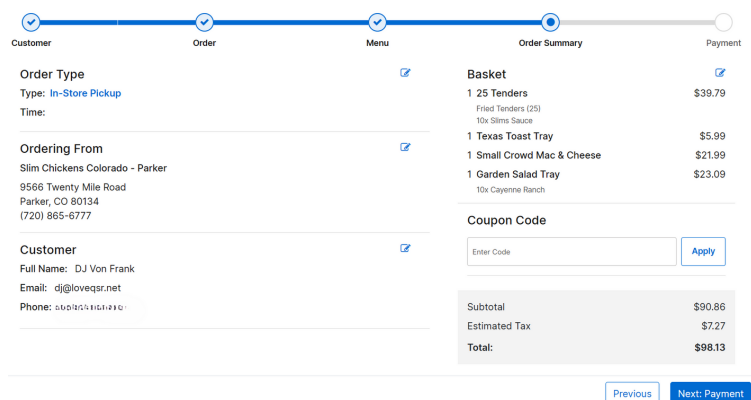
The 'Order' section shows a progress bar with 'Customer', 'Order', 'Menu', and 'Order Summary' steps. The 'Order' step is active. Below it, there's a 'Select order type' section with 'In-Store Pickup' and 'Delivery' buttons. A 'Time' dropdown is set to 'ASAP'. An 'Address' field is present. 'Clear' and 'Search' buttons are at the bottom. A red circle with the number 4 is next to the form.

5. Under "Menu", input the order's details and select items, adding notes if required.



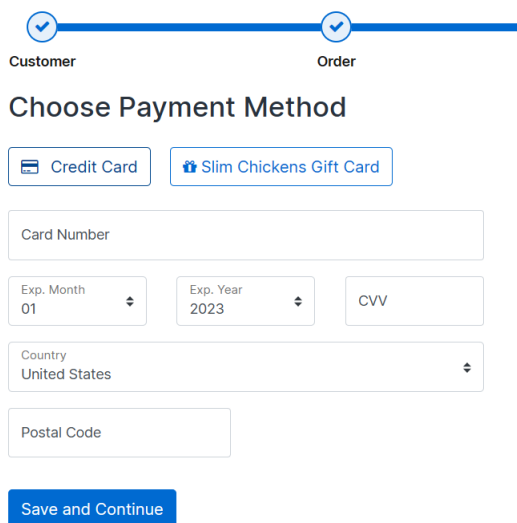
The 'Menu' section shows a summary of the order: Subtotal: \$90.86, Estimated Tax: \$7.27, Total: \$98.13. Below this is a text area for 'Add order notes (Optional)' and 'Previous' and 'Next: Summary' buttons. A red circle with the number 5 is next to the form.

6. In "Order Summary":
  - a. Confirm customer details.
  - b. Apply coupon codes, if available.



The 'Order Summary' section shows a progress bar with 'Customer', 'Order', 'Menu', 'Order Summary', and 'Payment' steps. The 'Order Summary' step is active. It displays 'Order Type' (In-Store Pickup), 'Ordering From' (Slim Chickens Colorado - Parker), 'Customer' details (DJ Von Frank), a 'Basket' of items (25 Tenders, Texas Toast Tray, Small Crowd Mac & Cheese, Garden Salad Tray), and a 'Coupon Code' field. A summary of Subtotal, Tax, and Total is shown. 'Previous' and 'Next: Payment' buttons are at the bottom. A red circle with the number 6 is next to the form.

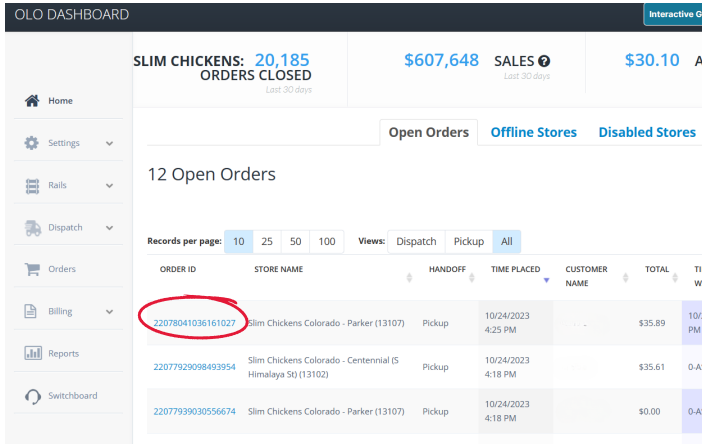
7. Finally, contact the customer to confirm their order and obtain payment details. Enter payment information, ensuring the total matches the JotForm entry. If any discrepancies arise:
  - a. If lesser, proceed with order submission.
  - b. If greater, consult the customer before finalizing.



The 'Choose Payment Method' section shows two options: 'Credit Card' and 'Slim Chickens Gift Card'. The 'Credit Card' option is selected. Below it are fields for 'Card Number', 'Exp. Month' (01), 'Exp. Year' (2023), 'CVV', 'Country' (United States), and 'Postal Code'. A 'Save and Continue' button is at the bottom. A red circle with the number 7 is next to the form.

## Step 4: Communicate with the Store

1. In the OLO Dashboard's "Home", find the recent order and select "Print", saving as a PDF.



OLO DASHBOARD

SLIM CHICKENS: 20,185 ORDERS CLOSED Last 30 days

\$607,648 SALES Last 30 days

\$30.10 A

Home Settings Rails Dispatch Orders Billing Reports Switchboard

Open Orders Offline Stores Disabled Stores

12 Open Orders

Records per page: 10 25 50 100 Views: Dispatch Pickup All

| ORDER ID          | STORE NAME                                                  | HANDOFF | TIME PLACED        | CUSTOMER NAME | TOTAL   | TIN     |
|-------------------|-------------------------------------------------------------|---------|--------------------|---------------|---------|---------|
| 22078041036161027 | Slim Chickens Colorado - Parker (13107)                     | Pickup  | 10/24/2023 4:25 PM |               | \$35.89 | 10/2 PM |
| 2207792908493954  | Slim Chickens Colorado - Centennial (S Himalaya St) (13102) | Pickup  | 10/24/2023 4:18 PM |               | \$35.61 | 0 AS    |
| 22077939030556674 | Slim Chickens Colorado - Parker (13107)                     | Pickup  | 10/24/2023 4:18 PM |               | \$0.00  | 0 AS    |

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Print Refund Order Other Actions

mary

Payment Summary

Payment Status: Billed

@gmail.com - Opt-In

Total: \$35.89

[Payment Breakdown](#)

Colorado - Parker (13107)

2. In Outlook Calendar, create an event for the order:

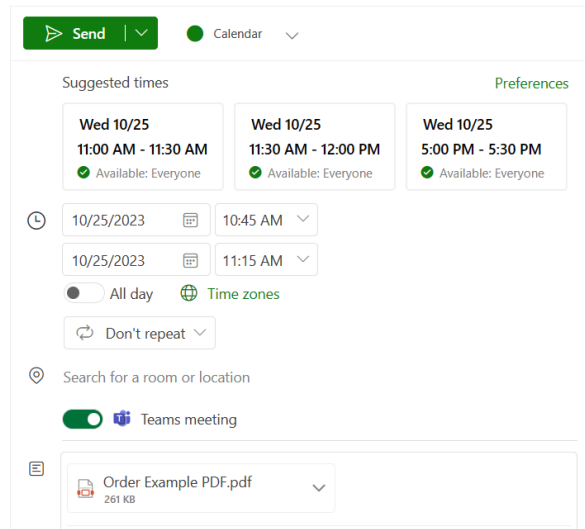
o Title: "Direct Sales Order | \$[Total] | [Order #]"

■ See example:

- Total: \$540.32
- Order: #22078041036161027
- Time/Date: October 26 at 11:15 AM

- o Time it 30 minutes ahead of pick-up.
- o Share with GM and store email.
- o Attach the saved PDF to the event.

3. Confirm receipt of the order with the store, calling if necessary.



Send Calendar

Suggested times

Wed 10/25 11:00 AM - 11:30 AM Available: Everyone

Wed 10/25 11:30 AM - 12:00 PM Available: Everyone

Wed 10/25 5:00 PM - 5:30 PM Available: Everyone

10/25/2023 10:45 AM

10/25/2023 11:15 AM

All day Time zones

Don't repeat

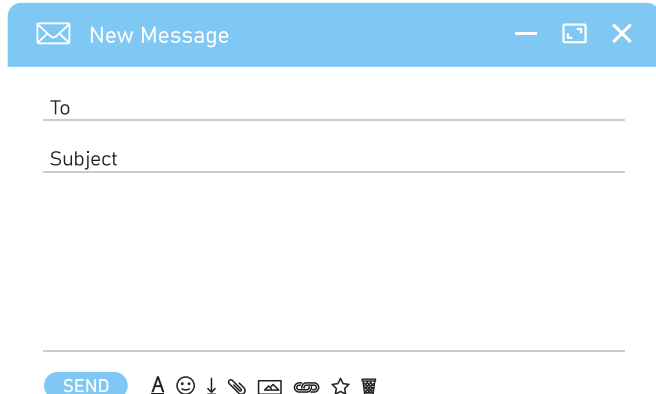
Search for a room or location

Teams meeting

Order Example PDF.pdf 261 KB

## Step 5: Post-order Guest Interaction

1. Send a confirmation email to the customer using the designated template.
2. Offer assistance and remind them of the pick-up or delivery details.



New Message

To

Subject

SEND

# LIST OF STORE EMAIL ADDRESSES

## Aurora

auroragm@loveqsr.net  
slimchickens13101@loveqsr.net

## Centennial

centennialgm@loveqsr.net  
slimchickens13102@loveqsr.net

## CO Springs

victoryridgegm@loveqsr.net  
slimchickens13106@loveqsr.net

## Parker

parkergm@loveqsr.net  
slimchickens13107@loveqsr.net

## Falcon

falcongm@loveqsr.net  
slimchickens13108@loveqsr.net

## Austin Bluffs

austinbluffsgm@loveqsr.net  
slimchickens13111@loveqsr.net

## Lehi

lehigm@loveqsr.net  
slimchickens13104@loveqsr.net

## Herriman

herrimangm@loveqsr.net  
slimchickens13105@loveqsr.net

## Pleasant Grove

pleasantgrovegm@loveqsr.net  
slimchickens13110@loveqsr.net

## Spanish Fork

spanishforkgm@loveqsr.net  
slimchickens13109@loveqsr.net