



## Accounting and Follow-Up Software for Direct Sellers

Event date: \_\_\_\_\_

Organizer Name: \_\_\_\_\_

Event Name/Location: \_\_\_\_\_

Organizer Number: \_\_\_\_\_

### **Setup:**

- Tables (if not provided)
- Chair (if not provided)
- Tablecloth
- Table décor, bins, shelves
- Canopy (if outdoor event)
- Dolly or wagon
- Company and product banner/signage
- Inventory for sale (cash and carry)
- Display products (warmers, mirrors, etc.)
- Outlet strip (if using electricity)
- Extension cord (if using electricity)
- Activity or candy bowl for kids

### **Business Supplies:**

- Business cards
- Flyers with top products, how to order and your contact info (including website links)
- Monthly specials flyer
- Samples to giveaway
- Raffle forms
- Square reader
- Change for cash and carry sales
- Cell phone – for work use only!
- Calendar
- Order forms/receipt book
- Ink pens
- Shopping bags

### **To make the day more enjoyable:**

- Plenty to drink
- A healthy lunch
- Toothbrush/toothpaste
- Sunscreen for outdoor events
- Clothing layers
- A teammate, friend, or one of your children to help!

### **After the vendor event:**

- Schedule follow-up to new leads
  - Enter leads into CRM
  - Assign follow-up campaign, including calling your raffle winners
- Remove sold items from inventory
- Record income and expenses in accounting software

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