



Barter Exchange Administrator Daily Checklist

Name:

Date:

EVERY DAY TASKS

- | | |
|--|----------------------------|
| <input type="checkbox"/> Data entry of new members | Notes <input type="text"/> |
| <input type="checkbox"/> Approved pending accounts | Notes <input type="text"/> |
| <input type="checkbox"/> Actioned CRM tasks assigned to me | Notes <input type="text"/> |
| <input type="checkbox"/> Run missing directory listing report | Notes <input type="text"/> |
| <input type="checkbox"/> Moved listings / edited listings of members | Notes <input type="text"/> |
| <input type="checkbox"/> Checked pending PAY ANYONE transactions | Notes <input type="text"/> |
| <input type="checkbox"/> Reversed "strange" PAY ANYONE transactions | Notes <input type="text"/> |
| <input type="checkbox"/> Sent email about reversed PAY ANYONE transactions | Notes <input type="text"/> |

GENERAL TASKS

- Completed Manual Transactions Today
- Receipted Cash Today
- Completed Reversals Today
- Answered Customer Emails Today
- Answered Customer Telephone Calls Today
- Fixed Directory Listings Today

Summary of other activities undertaken today: