



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

Received Cash Today

Completed Reversals Today

Answered Customer Emails Today

Answered Customer Telephone Calls Today

Fixed Directory Listings Today

Summary of other activities undertaken today: