Selection Sheet Manager I

# Objective:

This class is an overview of the Selection Sheet Manager program. Students will be able to identify Selection sheet header elements and their roles. Students will be able to create selection sheets, search and add items, and be able to identify product details for the customer. Students will understand roles of individual header elements, and toolbar functions.

# Pre-Reading:

* Home Screen Overview
* Header Elements
* Create Selection Sheet
* Add Buyer Account
* Item Search (SSM)
* Adding Items to Selection

# Lesson Plan:

* Home Screen Overview:
  + Calendar & Reminders
    - Reminders can be used to track dates samples given out
  + Recent Activity
  + Search Selection sheets
* Create selection sheet
  + Search existing customers
  + Add new customer to File Management
  + Edit/view customer details
* Header Elements
  + Customer Information
  + Dates
  + References
  + Job Information
  + Logs
  + Notepad
* Selection sheet elements
  + Adding an alternate address if needed
  + Role of buyer account & relation to pricing
  + Adding showroom designer
* Selection sheet folders
  + Header
  + Items
  + Attachments
* Toolbar functions review – (Modes to manipulate selection sheet)
  + Adding Items to Selection
    - Room Type & Area
  + Mass Update Mode/Edit Single Item
    - Update sheet at once
    - Edit Individual lines
  + Toggle pricing
  + Adding attachments
  + Delete Mode
  + Item Search & Details
    - Search Index
    - Item#, Description, Color & Pattern
    - Details, Product Knowledge, Available Inventory
  + Notes
* Search Selection Sheets
  + By Selection sheet #
  + By Customer
  + Advanced options
  + Search filters

# Follow-up reading:

* Toolbars Reviewed
* Pricing Review
* Custom Part #