Selection Sheet Manager II

# Objective:

Students taking this course should have already taken SSM 101 or have basic working knowledge of Selection Manager (SSM 101).

This course will explain how to print & distribute (email) selection sheets to customers and end-users without pricing or with correct pricing for the entity requesting the selection sheet.

This course will explain the steps involved to flipping a selection sheet to a reference in Navigator, that can then be processed into a live sales order.

# Pre-Reading:

* Printing & Distribution
* Flip Selection sheet to sales order

# Lesson Plan:

* Verify Buyer account exists or update information in this field
* Verify showroom designer has been added to selection sheet in Job information
* Review Items listed on selection sheet
  + Verify re-order if item selected to order shows “Previously Ordered”
    - Verifying past orders placed through logs
    - Move to mass update if nothing “previously ordered”
* Mass Update
  + Update selection sheet items with measurements given by buyer (items being ordered)
    - Explain difference between mass update & skipping to Ordering items without update.
  + Select Order Selection Items from Toolbar
    - Select items to order
  + Review ordering steps in progress bar to follow to completion
  + Order Header Information:
    - Explain & review Customer information vs. Ship to Information (roles)
    - (Step 3) Complete Order Header – ***Required fields***
      * PO Number
      * Ship Date
        + Explain role of ship date
      * Ship Via
      * Salesperson 2
      * Branch
      * Warehouse
    - Complete Order Header: ***Non-required fields***
      * Job Name
      * Order Type
      * Order Handling
  + Message Lines:
    - Explain location of message lines
    - Explain use of message lines
  + Verify Order & Submit
    - Call out Estimate Total & that taxes & handling charges are not accounted for in selection sheets.
  + Copy reference # for use in Navigator program
    - Explain reference
    - Show option for update selection sheet status
    - Review options in selection sheet manager after all ordering steps have completed
      * CSR’s: will not update any information relating to selection sheet.
    - Explain system operation in sending attached quote to selection sheet creator upon completing the above steps.
    - Show updated steps recorded in sheet logs
  + Review logs and “previously ordered” note – explanation & reinforcement
* Navigator follow-up
  + Pull up reference # created in Navigator
  + Review facets of order in relation to selection sheet
    - Selection sheet # link

# Follow-up Reading:

* Order Types & Handling
* Customer Profiles
* Order Status Codes