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