Navigational Path Overview Meeting

P21 Manual Training Modules
& Quiz Content Example
7-DEC-16

This Manual Training Modules & Quiz Content document can be utilized as a template to organize and create Ritz Safety University Training Modules and coordinated Quiz Content from existing Ritz Safety internal manuals and procedures, as well as, assist with determining the target completion date for each week's modules.

Training Modules & Quizzes

<u>Week 1 – Module One</u> – Sections to be used as "Course Content"

P21 Portal **(pdf Page 4)**

How to Enter an Order/Quote in P21**(pdf Page 5)**

How to Convert a Quote to an Order **(pdf Page 11)**

Additional Order Entry Tab Details & Definitions **(pdf Page 12)**

Front Counter Order Entry **(pdf Page 15/16)**

Front Counter Order Entry Screen Shot **(pdf Page 17)**

Differences between 'Orders' and 'Front Counter Orders' Screens **(pdf Page 17)**

Will-Call Orders **(pdf Page 18)**

How to Create a New Contact in OE **(pdf Page 20)**

Contact Maintenance **(pdf Page 21)**

<u>Week 1 – Module One – Quiz</u>

1. **What is the primary function of the second screen of the P21 Portal?**

- It displays a calendar of upcoming Sales & Clearance of merchandise.
- The portal contains customer inquiries and messages about products.
- It assists in follow-up of shipped items, accurate data to clients, and open quotes.

2. **When entering a Backorder (B) or Drop Ship (D) what two pieces of data MUST be entered?**

- Item number and quantity.
- PO cost and the commission cost.
- Order date and the expiration date.

3. **When entering a quote, what is the default expiration date?**

- 10 days
- 15 days
- 30 days

4. **When converting a quote in a New Order Entry screen what data must be typed into the Order Number box?**
   - Order confirmation number.
   - Quote number.
   - Date the quote is being converted

5. **When converting a quote to an order in the Front Counter screen what is the most important task related to excellence in customer communication?**
   - Click Email Order Confirmation.
   - Confirm Contact Information.
   - Click the Quote Box and enter the Quote Number.

6. **What is the Pricing tab used for?**
   - Total due for current order.
   - The pick ticket number.
   - Tier Level pricing established for the customer.

7. **What is the Remittance tab used for?**
   - Credit card, check or cash order.
   - Name, address, phone of where the product is shipping.
   - Billing address for the customer.

8. **When printing invoices from the Front Counter Order Entry screen, what tab must be used for this function?**
   - Transaction tab.
   - Front Counter tab.
   - Customer tab

9. When creating a Will Call Order shipped to different location, what tabs would you need to access?

- Carrier, then Will Call Sales Location
- Order Entry, then Carrier.
- Delivery Instructions, then Ship Info.

10. If the same contact handles multiple customer records what is the correct procedure?

- Create a new contact each time, for each order.
- Use the same Contact ID for each order.
- Create a new account for each order.

Week 1 – Module Two – Sections to be used as "Course Content"

Duplicating Quotes/Orders **(pdf Page 22)**

Non-Stock Items in Order Entry **(pdf Page 26)**

Back Order/Drop Ship/Transfer **(pdf Page 27)**

Purchasing Schedule **(pdf Page 27)**

Entering a New Item # In Order Entry **(pdf Page 28)**

Supplier Maintenance **(pdf Page 30)**

Item Master Inquiry (F2) **(pdf Page 31)**

How to View or Modify Existing Orders **(pdf Page 32)**

To View an Existing Order **(pdf Page 33)**

Week 1 – Module Two – Quiz

1. If you want to duplicate a quote what is the first step in the process?

- Enter the 'Contact ID' for the new quote/order.
- Enter the 'Ship To ID' of the company you are duplicating the quote/order for.
- Open a new 'Order Entry' screen.

2. When duplicating a quote, what two items will default from your original data and must always be checked to ensure the new quote/order is correct?

- PO Cost and Commission Cost.
- Shipping Address and PO Cost.
- Quantities, Pricing, and Information under the Ext. Info tab.

3. When duplicating a quote, under Previous Requests what information should be cleared out?

- Order Date.
- Customer ID.
- All of the above.

4. **When duplicating a quote, under what data will not pull over from the previous screen?**
   - PO Cost and Commission Cost.
   - Pricing from your original quote.
   - Information under the ‘Ext. Info’ tab

5. **When an item is not in stock, what is the first action you should take?**
   - Check the Stock Availability tab to see if a different location has the product.
   - Call the supplier to get price, availability and lead-time on the item.
   - Call the supplier to find out cost, availability, lead-time, and drop ship minimums.

6. **Entering a New Item Number In Order Entry where do you enter Item Description?**
   - Product Group tab.
   - Item Creation tab.
   - Cost tab.

7. **What is the tab you should click on to begin Supplier Maintenance?**
   - Supplier ID tab.
   - Supplier Maintenance tab.
   - Inventory tab.

8. **When performing an Item Master Inquiry (F2) what information is available?**
   - Customer Name, Address, and Contact Information.
   - Purchase History, Open POs with the Supplier, Transfer Information.
   - Supplier Product Quote Requests, Existing Orders, Location of Supplier.

9. **When viewing or modifying an existing order what do you click on to bring up the Order Processing information?**

- Order Number.
- Client Name.
- Quote Number.

10. **To view an Existing Order what screen should you navigate to?**

- Order Processing screen.
- Item Master Inquiry screen
- Order Entry screen.

Week 1 – Module Three – Sections to be used as "Course Content"

How to Cancel an Order **(pdf Page 34)**

Customer on Hold Status **(pdf Page 35)**

Validating an Open Order **(pdf Page 37 – no heading)**

Customer Master Inquiry (F8) **(pdf Page 37/38)**

Open Order Report **(pdf Page 38/39)**

Invoices **(pdf Page 40)**

How to Email an Individual Invoice to a Customer **(pdf Page 40)**

How to Email Multiple Invoices **(pdf Page 41/42)**

How to Adjust the PO # on Invoice **(pdf Page 42/43)**

Week 1 – Module Three – Quiz

1. **If you want to cancel an order in the Order Entry screen, what's are the first two steps in the process?**

- Pull up existing order in a new 'Order Entry' screen and check the "Cancelled" box.
- Contact the warehouse that the product is being sent out of and check the "Cancelled" box.
- Change Disposition to 'C' for Cancel and cancel the Pick Ticket.

2. **A customer is has an On-Hold Status due to their account being over the limit where do you look for details?**

- Check AR Drill Down by Customer ID.
- Check "Credit" and "Terms" tab in Order Entry.
- In Order Entry – check "Credit" tab.

3. **A customer is has an On-Hold Status because their order must be COD, where do you look for details?**

- Check AR Drill Down by Customer ID.
- Under "Credit" or "Terms" tab in Order Entry.
- Check Cash Collection Call Notes.

4. **A customer is has an On-Hold Status and their account is locked down, what procedure do you perform?**

- Email A/R and they will research account.
- Let customer know they are set up as COD.
- Let customer know what invoices they have that are past due.

5. **What important step must you perform before releasing accounts on hold?**

- Select the COD or Approved options in the Validation Action field
- Run an Open Order Report and select validation hold/COD.
- Review customer credit limit and payment history.

6. **The Customer Master Inquiry displays what important information?**

- Name, Address, and Contact Information.
- Item ID, Supplier Information, and Open Orders.
- Open Invoices, Aging, Credit History.

7. **The Ritz Safety fulfillment rate for "in-stock" products across the company is?**

- 87%
- 94%
- 75%

8. **On what day of the week should you run your weekly Open Order Report?**

- Monday.
- Wednesday.
- Friday.

9. **When sending multiple invoices to a client, what is the proper procedure?**

- Select invoices, click Print Preview, save in a document, send as attachment.
- Select Accounting, click Accounts Receivable, click Transaction.
- Enter Customer ID, Check the Reprint Box, Check Open Invoices, send attachment.

10. **When adjusting the PO Number on an Invoice, what screen progression will you follow?**

- Open Invoices > Retrieve Query Icon > Select All Open Invoices.
- Accounting > Accounts Receivable> Transaction > Invoices.
- Accounting > Accounts Receivable > Inquiry > A/R Drill Down.