Training Items - Sales

Prerequisites:
-sales personnel should be able to perform all items in the Customer Service training.
-trainers should be fully trained on all Tier 2 checklists e.g. Ops Mgmt & Process, etc.

Question / Task / Scenario	Grade	How-To
What kinds of orders does your company do? ● raw material stock orders ● finished product stock orders ● assembly orders (for stock) ● assembly orders (for customer) ● service order (bill only) What "transaction code" in Cetec ERP would you assign to each of the above types of orders at order entry?	Demonstrate understanding of order scenarios and which apply to your company. Answer transaction codes: ● raw material stock orders - Stock ● finished product stock orders - Stock ● assembly orders (for stock) - Build ● assembly orders (for customer) - Build ● service order (bill only) - Charge	
Create a new customer. Add a customer contact and customer address to the new customer file.	● create new customer, contact, address	
Create a brand new quote. Name this quote "My first training quote".	● create new quote ● assign quote name	

Add customer name, ship-to address, and ship-via to a new quote.	● modify quoter/order header info; input customer name, ship-to, ship-via.	
Add one line item to the quote for due quantity 10 of a _new_ part. Set the customer "dock date" (due date) for one month from now. **Requirement:** this must be a raw or finished item you already have in stock, that the warehouse simply pulls off the shelf, packs up, and ships out. This is called a stock order. Find the cost of the part. Your company likes to sell parts at a 50% margin, so input a resale for the part accordingly. Quickly write down quantity of part/stock currently on hand, and add the line item to the quote.	● Ability to use "quick add" versus "add line" in order to add a quote line (the "add line" provides more options) ● Demonstrate understanding of PRC scheme in adding new part number ● qty = 10, ship date & dock date one month out ● demonstrate knowledge of how to find part suggested cost, average cost, and/or last purchase cost to help identify a reasonable resale ● know how to input resale at a 50% margin of the cost ● use resale field to input $2 price ● assign transaction code of 'Stock' to the line item ● be able to quickly find QOH (quantity on hand), which will be qty Zero for the newly created part	
You want to make sure that the person responsible for buying the material needed for your order gets special instructions regarding line item #1 on your quote. Edit line #1, and add a note that will copy over to the order so Purchasing can see it later.	● use the internal "sourcing note" field on the quote line item to accomplish task.	
Email the above quote (directly from Cetec ERP) to both your trainer and yourself.	● demonstrate mastery of downloading and/or emailing quotes from Cetec, leveraging CC field, or separating emails with commas to send to more than one recipient.	
Clone line item #1 of the quote to a new line item, so that all the information from line #1 is copied onto line #2 automatically.	● Ability to use the "clone quote line" feature.	

Delete line #2 immediately. Then, clone line #1 onto line #2 again.	● Ability to delete a quote line	

Path (detour) #1: Custom/Work Orders Only! (Build and Ship)

Question / Task / Scenario	Grade (The user must:)	Resources
Change the line you just cloned, line #2, to a different _new_ part number, due quantity 10, resale of five dollars, customer due date one month from today. Important! The new part (on line #2) represents a new product that your company manufacturers. The product will have a "bill of materials" associated with it, i.e. a list of raw materials/sub-assemblies needed to produce the finished good. This will be something that you build and then immediately ship out to the customer. Given that the part you are adding is a finished good with a bill of materials, make the appropriate change to the line item "transaction code" on line item #2 and update.	● edit a quote line ● Demonstrate understanding of internal PRC scheme in adding new part number ● due qty = 10, ship date & dock date one month out ● assign transaction code of 'Build' to the quote line, instead of 'Stock'.	
It is now time for Engineering (or another member of your sales department) to review the quote. Use Cetec ERP to assign the quote to them so that they receive an email from the system.	● demonstrate mastery of the Quote Workflow feature. Make assignment to another member of the team and send assignment email	
If you are responsible for quoting and estimating new manufactured parts and BOMs, please complete the BOMs training.	● complete BOMs training	
Convert the quote into an order to register demand	● convert quote to order to register booking of work order	

Once the work order is entered it is ready to be released to the warehouse and picked and built and
shipped immediately to the customer.

Click the top left logo to go to the Cetec ERP home screen. From the home screen, look up the following info:

- **look up the part/item on the work order**
    - Via part number in top-right search box
    - Via part number in Parts > List
- **from part record, check open orders for part**
    - Via 'Orders( )' tab in left side-nav
    - You should see two open orders for the part in question: one sales order you generated, and one internal work order for the part
    - Take note of the internal work order number for your part
- **look up the work order for the part**
    - Via order number in top-right search box
    - Via order number in Production > Orders > List
    - Via part number in Production > Orders > List
    - Check work order status/location, current actual labor progress against estimated, work history, etc.

Path (detour) #2: Standard Manufacturing Process (Work order handled separately from sales/stock order)

Question / Task / Scenario	Grade (The user must:)	Resources
Change the line you just cloned, line #2, to a different _new_ part number, due quantity 10, resale of five dollars, customer due date one month from today. Important! The new part (on line #2) represents a new item that your company manufacturers. You need to "book" the order in order to register the demand for the part, and to signal the requirement to production to create a work order for the part. Set your quote line item (line #2) to transaction code 'Stock', and convert the quote into an order to register the demand.	● edit a quote line ● Demonstrate understanding of internal PRC scheme in adding new part number ● due qty = 10, resale, ship date & dock date one month out ● assign transaction code of 'Stock' to the quote line ● convert quote to order to register booking of stock order, and to register demand for the item (i.e. to signal production)	
Coordinate with manufacturing to manage the fulfillment and completion of the work order. If you are responsible for internal fulfillment of work orders, please complete the Inventory, Fulfillment, Production training and the Ops Mgmt & Process training.	● demonstrate understanding of conversion of sales order registering demand and signaling production ● ensure process exists to facilitate coordination and communication between sales orders booked and production work orders created in response. ● complete the Inventory, Fulfillment, Production training and the Ops Mgmt & Process training if necessary	
Enter an internal build-for-stock order for the item (quoted previously on quote line #2) to create a Work order. (Contact your training head if necessary to input the work order)	● see the Inventory, Fulfillment, Production training and the Ops Mgmt & Process training for instruction on creating internal build-for-stock work orders.	
Once Production completes the work order for the part,		

it will become available (i.e. "on hand") to be picked and shipped on the sales order.

Click the top left logo to go to the Cetec ERP home screen. From the home screen, look up the following info:

- look up the sales order you created earlier
    - Via order number in top-right search box
    - Via order number in Sales > Order List
    - Check sales order info, status, item quantity on hand, etc.
- look up the part/item on the sales order
    - Via part number in top-right search box
    - Via part number in Parts > List
- from part record, check open orders for part
    - Via 'Orders( )' tab in left side-nav
    - You should see two open orders for the part in question: one sales order you generated, and one internal work order for the part
    - Take note of the internal work order number for your part
- look up the internal work order for the part
    - Via order number in top-right search box
    - Via order number in Production > Orders > List
    - Via part number in Production > Orders > List
    - Check work order status/location, current actual labor progress against estimated, work history, etc.

(resume normal training path below)

Go to Sales > Quotes > List. Sort by 'All' quotes. Find the quote you were working with before you converted it to an order. Open it. Clone the quote to a new quote. Add a new line (line #3) to the quote for a part ___, qty 10, unit resale of one dollar, due one month from now. Important! This part represents a product or service your company offers. The product does not contain any BOM (bill of materials) associated with it. Your company does not care to track the inventory ramifications of this order. All you want to do is process the order relay a simple *charge* to the customer for the work. This is a bill-only, service-only order. Assign the appropriate "transaction code" and assign to the quote line.	• ability to look up a 'Closed' quote in the quote list. • clone / re-open a closed quote • add a new quote line • qty = 10, ship date & dock date one month out • demonstrate understanding of internal PRC scheme; enter Prcpart number as service line item on the quote. • assign transaction code of 'Charge' to the quote line.	
You get an email back from a customer referencing a certain quote they received several months ago, and they would like to place an order. They provide a PO number to you. Find the quote in Cetec ERP based on the quote number or customer. This is your "My first training quote". Open the quote, input the PO number the customer provided, and place the order.	• look up quote in quote list using quote number and/or customer as search parameter • edit quote header; input PO number from customer • convert quote to order	

The customer calls and requests the following changes to all three lines on their (above) order ● they want it due two months from now, not one. ● they want qty 20, not qty 10, of each line ● they want a new ship-to address (make something up) ● they want to delete line 3 (service) from the order	● look up sales order in order list using order number or customer as search parameter ● ability to 'edit' sales order and update each line item: qty = 20, ship date & dock date two months out, new ship-to address ● ability to delete a sales order line	
If you are responsible for fulfilling, picking, and/or shipping orders, please complete the "Inventory, Fulfillment, and Production" training.		
Customer calls and wants to order *exactly* the same things you quoted on the "My First Training" quote. Find the old quote and clone to new.	● ability to look up old closed or ordered quotes. ● ability to clone old quotes to new.	
The customer then changes their mind and informs you that they are no longer interested in that quote.	● ability to manually close/reconcile a quote with a reason type.	
After selling a few of the BOM parts (from line #2 in the above "My First Training" quote), your company decides to just go ahead and build Qty 100 of them and keep them on the shelf for future potential orders. Find the old quote for those BOM parts and clone. To enter the "build-for-stock" order, just change the customer to an "internal" customer. Change qty to 100. Convert to order.	● look up old quote in quote list ● clone quote ● change customer in quote header to "internal" customer	

If you are responsible for managing build-for-stock programs, please complete the "Inventory, Fulfillment, and Production" training.		
You need to simply charge a customer. No quote, no order, just a one-off charge you need to bill the customer for. Create an invoice and bill the customer (hint: go straight to the invoice list)	● ability to create a bill-only invoice	