BRANCH ASSOCIATE (COUNTER) NEW HIRE

TRAINING & ACCOUNTABILITY MODULE

Name: \_\_\_\_\_\_ Home Branch: \_\_\_\_\_\_\_ Start Date: \_\_\_ \_\_\_\_

Mentor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

DAY 1

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| * **BRANCH PROCEDURES**   + Branch Tour / inventory layout / Warehouse –   + Meet the team -   + Emergency Procedures   + Alarm Systems   + Open & Close Branch   + Work Schedule   + Time Clock   + Branch hours / Coverage   + Branch locations and Branch numbers – give new sheet   + Accident procedures   + Approving OT / FTO   + Keys – Cage, yard/fence outbuildings   + BUILDING KEYS AT 90 DAYS   + Dress code / Appearance – FROM HANDBOOK   + Branch Beautification / standards * **PERSONNEL**   + Employee accountability via Checklist   + Managers Goals & Expectations   + Time Management   \*What to do when there’s nothing to do   * **CUSTOMER SERVICE**   + Core Values & Fundamentals   + Customer service expectations   + Company Standards   + Handling Phones (script) and Counter customers   + CCS Customer Connect Service   \*Assignments and expectations   * + Meet and Greet all customers / Introductions   + Using the Virtual counter to enhance customer experience. | |  | | --- | | **BRANCH PRODEDURES** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **PERSONNEL** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **CUSTOMER SERVICE** | | Trainer: | | Validated by: | | Date: | |
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WEEK 1

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| * **PRODUCT LOCATION – SHOWROOM / COUNTER**   + Product knowledge – training expectations and resources   \*Rheem  \*Allied  \*Moen  \*Weil  \*Zoeller  \*Mueller (press, copper, malleable & pvc)  \*Gerber  \*Viega  \*OmegaFlex  \*Comfortstar   * + Shelf sequencing   + Self-Serve area (if applicable)   + Displays * **INTRODUCTION TO ECLIPSE**    + Logging in to Eclipse   + Navigating Eclipse menus and screens   + Use standard and Universal function keys   + Search for customers in sales order entry   + Search for product in sales order entry   + Understanding the availability column   + Understanding the 4 screens in Eclipse     - Body     - Header     - Status     - Totals   + Use the Mode key and why?   + Use find key * **ORDER ENTRY**   + Enter a sales order   + Check inventory for an item availability   + Add PO to order   + Complete order for P/U   + Print order   + Email order to customer   **Give SOE1 workbooks**  **SOP**  **TIXFIX**  **RELEASES**  **CREDIT CARD & CHECK PAYMENT**  **CUSTOMER NEW OPEN ACCOUNT SETUP**  **SERIAL NUMBER ENTRY** | |  | | --- | | **PRODUCT LOCATION SHOWROOM / COUNTER** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **INTRO TO ECLIPSE** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **ORDER ENTRY** | | Trainer: | | Validated by: | | Date: | |
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BRANCH ASSOCIATE NEW HIRE

TRAINING & ACCOUNTABILITY MODULE

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WEEK 2

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| * **ECLIPSE ORDER ENTRY COMMENTS**   + Understanding the different types of comments   + Enter a comment attached to a product   + Enter a comment attached to the order   + Edit a comment   + Insert and delete a comment * **ECLIPSE HEADER SCREEN**   + Hot keys   + Change the shipping address of a ticket   + Changing the ship-to-customer   + Enter Customer PO   + Create Shipping instructions   + Understand Internal notes * **ECLIPSE STATUS SCREEN**   + Understand the status codes (PU, Bid, Cancel, Ship and Call)   + Change your view (Ship via, Req date / Complt Date, Delivery Times)   + Viewing items within a “box” * **ECLIPSE TOTAL SCREEN**   + Understanding the Total screen   + Applying Cash/Credit/Check to a sales order * **ACKNOWLEDGEMENTS**   + Concept of an Acknowledgement   How to print/Fax/Email to your customer  **SOP**  **GAS EXCHANGE**  **DUCTBOARD PROCESSING**  **DELIVERY AUTHORIZATION FORM** | |  | | --- | | **ECLIPSE ORDER ENTRY COMMENTS** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **ECLIPSE HEADER SCREEN** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **ECLIPSE STATUS SCREEN** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **ECLIPSE TOTAL SCREEN** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **ACKNOWLEDGMENTS** | | Trainer: | | Validated by: | | Date: | |
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WEEK 3

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| * **SEARCHING SALES ORDERS**   + Search using Quick Access   + Search by customer PO   + Search by product   + Search by Address * **DIRECT SHIPMENTS**   + The concept of a Direct Shipment   + How to search for vendors   + How to see totals for the vendor side of the order   + How to see totals for the customer side of the order * **BACKORDERS**   + Concept of a backorder   + How to see material in each shipping generation   + How to see totals for the entire order including backorder   + Logging a lost sale   + How to cancel a backorder * **INQUIRES**   + Future ledger (change the branch or list ALL)   + History ledger (change the branch or list ALL)   + Inventory Inquiry screen * **CREATING NON-STOCK ORDERS**   + Concept of a Non-Stock Product   + Creating a Non-Stock product on an order * **CHANGING PRICES IN SALES ORDER ENTRY**   + Handling price objections   + How to change the selling price of an item   + How to change the selling price of a group of items * **PRODUCT LOCATION – PARTS ROOM**   + Product knowledge   + Understand shelf sequencing   + Displays   **SALES ORDER ENTRY BOOK 2**  **SOP**  **NONSTOCK ORDERS**  **TNS PROGRAM** | |  | | --- | | **SEARCHING SALES ORDERS** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **DIRECT SHIPMENT** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **BACKORDERS** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **INQUIRES** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **CREATING NON-STOCK ORDERS** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **CHANGING PRICES IN SALES ORDER ENTRY** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **PRODUCT LOCATION PARTS ROOM** | | Trainer: | | Validated by: | | Date: | |

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WEEK 4

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| * **SCHEDULING A SALES ORDER**   + Understanding the Scheduling screen   + Scheduling products to ship on different dates * **PROCURING PRODUCTS**   + What does Procuring mean?   + When to procure an item   + Use the schedule screen to “Tag” / procure an item   + Split a procurement * **RETURN SALES ORDER**   + Explain the different types of returns   + Create a return to stock sales order   + Create a return to defective/Review sales order * **FREIGHT/HANDLING CHARGES**   + Add freight/handling charge to the total screen   + Add freight/handling charge to the body of an order   + Explain difference between total freight and subtotal freight * **DETAIL SCHEDULING**   + Explain detail scheduling   + Reorganize your order using the detail scheduling screen   + Procure items on order using the detail scheduling screen   **SALES ORDER ENTRY 3**  **SOP**  **RETURNS**  **CUSTOMER REFUND REQUEST** | |  | | --- | | **SCHEDULING A SALES ORDER** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **PROCURING PRODUCTS** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **RETURN SALES ORDER** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **FREIGHT / HANDLING CHARGES** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **DETAIL SCHEDULING** | | Trainer: | | Validated by: | | Date: | |
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WEEK 5

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| * **MESSAGING SYSTEM**   + Draft a message and send   + View and maintain received messages   + View and maintain messages you sent   + Print or hold a message   + Managing your Hold files   + Message scheduling for future arrival * **CALL TRACKING / JOB QUEUING**   + Create a call tracker and send it to another user   + Retrieve and append a call tracker sent to you   + View and maintain call trackers using Job Queue viewing screen   + Close a call tracker * **CUSTOMER CALLING QUEUE**   + What is the difference between New Items and Troubled Items   + Use the calling queue to ship complete orders   + Maintaining the calling queue for troubled orders   + Calling customers and then logging call   + Checking the Change log * **CUSTOMER PAYMENT ON ACCOUNT**   + Navigate to the customer A/R screen   + Understanding statement due amount   + Enter A/R payment in sales order   + Print confirmation for customer * **SALES ORDER ADMINISTRATION**   + Using “TIXFIX” for order corrections   + Using “RELEASE” when order is on hold   + When to use LS (Lost Sale) and why   + Requesting TNS via eclipse messaging * **OFFICE ADMINISTRATION**   + Using your email   + Interoffice Mail   + Basic PC file management (Windows 10)   + Web searching vendor sites   + Checking the Change log   + Accessing the company portal   **SOP**  **MESSAGE SCHEDULER FUNCTION** | |  | | --- | | **MESSAGING SYSTEM** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **CALL TRACKING / JOB QUEUING** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **CUSTOMER CALLING QUEUE** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **CUSTOMER PAYMENT ON ACCOUNT** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **SALES ORDER ADMINISTRATION** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **OFFICE ADMINISTRATION** | | Trainer: | | Validated by: | | Date: | |

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WEEK 6

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| * **WAREHOUSE FUNCTIONS**   + location maintenance   + Transfers (Picking and staging)   + Receiving verification / Put-away   + Warehouse Queues   + Cycle counting * **ECLIPSE REPORTS**   + Old Open PO   + Open Order   + Negative on hands   + No Location   + Invoice Preview Queue   + Inventory Adjustment   + Disputed Transfers * **INVENTORY MANAGEMENT**   + Min/Max replenishment levels   + Bay maintenance / Inventory adjustments   + Adding / Changing inventory levels   + How stocking levels are determined   + Requesting stock from other branches * **CUSTOMER SPECIALS**   + Review process for applying customer specials   + Evaluating customer trends for set pricing   + Submit customer special   **SOP**  **CYCLE COUNT PROCEDURE**  **INVOICE PREVIEW QUE**  **TRANSFER DISPUTE PROCESS** | |  | | --- | | **WAREHOUSE FUNCTIONS** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **ECLIPSE REPORTS** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **INVENTORY MANAGEMENT** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **CUSTOMER SPECIALS** | | Trainer: | | Validated by: | | Date: | |
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WEEK 7

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| * **CASH DRAWER**   + Collecting payments/Cash/Check/CC   + Utilizing CC machine   + Reconciling Cash Box end of day   + Closing CC machine (Detail/GBOK)   + Bank Deposits * **ASSOCIATE INCENTIVES**   + PFP Program   + Gainshare Programs   + Referral program   + Surplus Commission program * **TRAINING**   + Monthly Product training requirements   + ASA Website (Login)   + Allied website   + Rheem Website   + Other related websites * **WARRANTY CLAIMS**   + Processing Warranty claim   + Creating Debt memos   + Using Returns workbook   + Processing completed RGA   + Checking the Change log * **PRODUCT LOCATION – WAREHOUSE**   + Product knowledge   + Understand shelf sequencing | |  | | --- | | **CASH DRAWER** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **ASSOCIATE INCENTIVES** | | Trainer: | | Validated by: | | Date: |  |  | | --- | | **TRAINING** | | Trainer | | Validated by: | | Date: |  |  | | --- | | **WARRANTY CLAIMS** | | Training: | | Validated by: | | Date: |  |  | | --- | | **PRODUCT LOCATION**  **WAREHOUSE** | | Trainer: | | Validated by: | | Date: | |

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**TRAINING SCHEDULE**

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|  | START DATE | END DATE | MANAGER VALIDATION |
| DAY 1 |  |  |  |
| WEEK 1 |  |  |  |
| WEEK 2 |  |  |  |
| WEEK 3 |  |  |  |
| WEEK 4 |  |  |  |
| WEEK 5 |  |  |  |
| WEEK 6 |  |  |  |
| WEEK 7 |  |  |  |

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| Associate: |  |
| Manager: |  |

**DRIVER RESPONSIBILITIES**

**VERIFYING DELIVERY MATERIAL**

**ROUTE PLANNING (DESCARTE IF AVAILABLE)**

**LOADING/SECURING DELIVERIES**

**BOX TRUCK HEIGHT/WEIGHT RESTRICTIONS**

**DOT CHECKPOINT PROCEDURES**

**FUEL CARD**

**DELIVERY STANDARD PROCEDURES**

**WHERE TO LEAVE PRODUCT**

**SIGNATURES AND PAPERWORK**

**PAYMENTS ON COD**

**COMMUNICATING COMPETITION BACK TO THE BRANCH**

**RIDE ALONG TO KEY ACCOUNTS**

**WEEKLY TRUCK INSPECTION**

**ACCIDENT PROCEDURES**

PRODUCT TRAINING MODULES:

**RHEEM**

Model number nomenclature – test PROG50S36NRH67PV

Understanding stocked models & variations

Pocket guide – how to use

Website login for parts lookup and warranty entry

Rep one on one training

**Allied & Comfortstar**

Model number nomenclature

Understanding stocked models & variations

Website login for parts lookup and warranty entry

Mike Williams one on one training

**Moen**

Matt Friend Training modules

Understanding stocked models & variation

B2B website

Rep one on one training

**Weil & Laars**

Model number nomenclature

Understanding stocked models & variations

Accessories and add on products

Website login for parts lookup and warranty entry

Rep one on one training

**Zoeller**

Understanding stocked models & variations

Rep one on one training

**Mueller** (press, copper, malleable & pvc)

Online training

Search codes in Eclipse

Rep one on one training

**Gerber**

Rep one on one training to understand product differences

**Viega**

Rep one on one training

Search codes in Eclipse

**OmegaFlex**

Rep one on one training