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.
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| **BRANCH PRODEDURES** |
| Trainer:  |
| Validated by: |
| Date: |

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| **PERSONNEL** |
| Trainer:  |
| Validated by: |
| Date: |

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| **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** |

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| **PRODUCT LOCATION SHOWROOM / COUNTER** |
| Trainer:  |
| Validated by: |
| Date: |

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| **INTRO TO ECLIPSE** |
| Trainer:  |
| Validated by: |
| Date: |

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| **ORDER ENTRY** |
| Trainer:  |
| Validated by: |
| Date: |

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| Name: | Date: |



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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** |

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| **ECLIPSE ORDER ENTRY COMMENTS** |
| Trainer:  |
| Validated by: |
| Date: |

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| **ECLIPSE HEADER SCREEN** |
| Trainer:  |
| Validated by: |
| Date: |

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| **ECLIPSE STATUS SCREEN** |
| Trainer:  |
| Validated by: |
| Date: |

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| **ECLIPSE TOTAL SCREEN** |
| Trainer:  |
| Validated by: |
| Date: |

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| **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** |

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| **SEARCHING SALES ORDERS** |
| Trainer:  |
| Validated by: |
| Date: |

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| **DIRECT SHIPMENT** |
| Trainer:  |
| Validated by: |
| Date: |

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| **BACKORDERS** |
| Trainer:  |
| Validated by: |
| Date: |

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| **INQUIRES** |
| Trainer:  |
| Validated by: |
| Date: |

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| **CREATING NON-STOCK ORDERS** |
| Trainer:  |
| Validated by: |
| Date: |

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| **CHANGING PRICES IN SALES ORDER ENTRY** |
| Trainer:  |
| Validated by: |
| Date: |

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| **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** |

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| **SCHEDULING A SALES ORDER** |
| Trainer:  |
| Validated by: |
| Date: |

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| --- |
| **PROCURING PRODUCTS** |
| Trainer:  |
| Validated by: |
| Date: |

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| **RETURN SALES ORDER** |
| Trainer:  |
| Validated by: |
| Date: |

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| **FREIGHT / HANDLING CHARGES** |
| Trainer:  |
| Validated by: |
| Date: |

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| **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** |

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| **MESSAGING SYSTEM** |
| Trainer:  |
| Validated by: |
| Date: |

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| **CALL TRACKING / JOB QUEUING** |
| Trainer:  |
| Validated by: |
| Date: |

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| --- |
| **CUSTOMER CALLING QUEUE** |
| Trainer:  |
| Validated by: |
| Date: |

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| **CUSTOMER PAYMENT ON ACCOUNT** |
| Trainer:  |
| Validated by: |
| Date: |

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| **SALES ORDER ADMINISTRATION** |
| Trainer:  |
| Validated by: |
| Date: |

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| **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** |

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| **WAREHOUSE FUNCTIONS** |
| Trainer:  |
| Validated by: |
| Date: |

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| **ECLIPSE REPORTS** |
| Trainer:  |
| Validated by: |
| Date: |

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| **INVENTORY MANAGEMENT** |
| Trainer:  |
| Validated by: |
| Date: |

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| **CUSTOMER SPECIALS** |
| Trainer:  |
| Validated by: |
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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
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| **CASH DRAWER** |
| Trainer:  |
| Validated by: |
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| **ASSOCIATE INCENTIVES** |
| Trainer:  |
| Validated by: |
| Date: |

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| **TRAINING** |
| Trainer |
| Validated by: |
| Date: |

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| **WARRANTY CLAIMS** |
| Training:  |
| Validated by: |
| Date: |

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| **PRODUCT LOCATION** **WAREHOUSE** |
| Trainer:  |
| Validated by: |
| Date: |

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**TRAINING SCHEDULE**

|  |  |  |  |
| --- | --- | --- | --- |
|  | 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