

Order Management Training Topic List

These are some of the possible topics that can be covered in the Advanced Order Management Training class. Each class is structured to cover areas that are of most interest to the attendees.

- I. Products
 - A. Products, Product Versions, Version / Lot Control
 - B. Product Ownership
 - C. Sort Levels / Sort Groups
 - D. Expected Arrivals
- II. Kits
 - A. Kit Compositions
 - B. Kit Versions
 - C. Kit assembly request (auto / manual)
 - D. De-Kitting
- III. Offers
 - A. Offer Sort Levels
 - B. Offer Sort Groups
 - C. Offer Custom Categories
 - D. Offer Category Access Groups
 - E. Produce on Demand Offers
 - F. Custom Assembly Offers
 - G. Purge Offers
- IV. Order Entry
 - A. Filling Cart
 - B. Search / List / Categorize Offers
 - C. Checking Out
 - D. E-Mail Receipt Order Confirmation
- V. Views
 - A. Data Entry Settings
 - B. Client Access
 - C. Themes
 - D. Security
 - E. Images and Test Displays

- F. Optional Displays
- G. Starting Point
- H. Address Information Customization
- V(a) Pre-Registered User Setup
 - A. Define / Import Pre-registered Users
 - B. Menu Access Types
 - C. Link to Views
- VI. Order Streams
 - A. Stream Criteria
 - B. Backorder Handling
 - C. Shipping
 - D. E-mail
 - E. Offers to include
- VII. Warehouse Wave Processing
 - A. Wave Criteria
 - B. Wave Outputs
- VIII. Order Processing
 - A. Automatic Services
 - B. Manual Order Processing
- IX. Backorder Processing
 - A. Stream Processing
 - B. Selective Processing
- X. Pull Requests
 - A. Disposals, Shipping, Production, etc.
- XI. Order Importing
 - A. Order Upload from file
 - B. Order communication via XML
- XII. Pick / Pack / Ship Overview
- XIII. Order Adjustment / Order Interception
- XIV. Customer Service
 - A. Order Inquiry
 - B. Inventory Inquiry
- XV. Reporting, Analysis, Tracking, & Billing
- XVI. Discontinue / Replace / Deactivate

- A. Kit treatments
- B. Offer Treatments
- C. Order Treatments
- XVII. Merchandise Fulfillment
 - A. Product Clusters
 - 1. Product Size/ Color Clusters
 - 2. Product List Clusters
 - B. Pricing Strategies
 - 1. Price Classes
 - 2. Quantity based pricing
 - 3. Discounts
 - C. Payment
 - 1. Payment Types
 - 2. Shipping and Handling
 - 3. Tax
 - 4. Special Handling Types
 - D. Credit Card Processing
 - 1. Real Time Processing
 - 2. Batch Processing
 - 3. Manual Processing
 - 4. Merchandise View Settings
 - 5. Payment Collection
- XVIII. Inventory Allocations
 - A. Offer Quantity allocations
 - B. Order Quantity allocations
 - C. Budget allocations
 - D. New Allocation Structures
- XIX. Territory Assignment
 - A. Defining Client Structure
 - B. Territory Table Definitions
 - C. Tracking Territories
- XX. Response Analysis
 - A. Response Types
 - B. Source Codes

- C. Source Types
- XXI. Variable Data Field Definitions
 - A. Order Variable Information
 - B. Person Variable Information
- XXII. New Account Data Import from Version 4
 - A. Import Products / Offers
 - B. Import Names & Addresses
 - C. Import Pre-registered users
 - D. Import Product History
- XXIII. Client Rep Views
 - A. Defining Client rep access
 - B. Graphical Interface
- XXIV. Sharing w/ Project Management
- XXV. Project Tracking