

PRINTED CUSTOMER FOLDER

- Customer Generated PO
- Customer Order
- Customer Confirmation
- Shipping Documents
- Master Bill of Lading
- Customer Bill of Lading
- Invoice
- Delivery Invoice



RECEIVES SHIPPING DOCUMENTS
Prints shipping documents

RECEIVES BILL OF LADING
Prints Bill of Lading

CREATES INVOICE

SOFT STOP: SHIPPING

There is a soft stop here for customer service. Shipping documents are created and sent to Customer Service which are printed and attached to the Customer File. Also used for manual verification.

POSTS/PRINTS ORDER

Yay! The customer and I agree. Too bad I can't mark that anywhere in the system. Good thing I have my trusty cheat sheet that I use to write this all down..

*Print and post are treated as the same in the system

*MAKE SALES

No system alert

OOO!!! It's Wednesday at 12:00... Who hasn't order yet????

Pulls out cheat sheet
Calls each person

Manual process.



CONFIRMS ORDER WITH CLIENT

Now that I have manually retyped an order, let's confirm what I retyped with what the client typed.. too bad the system can't help me check!

Uses system to generate and send email BUT uses Outlook to manage confirmation. Uses Cheat Sheet to manage confirmation. ABISS does not currently help manage client confirmation

This is the MOST IMPORTANT part.

Watch me as I break out my cheat sheet. Because I don't fully trust the system, I make sure I have a back-up.

First chance at human error. System can't check.

LOTS of screens. Missed opportunity.

GENERATES NEW ORDER

Manually enters Customer PO into ABISS

Prints hard copy

Writes down on cheat sheet

Different process for LTO's

Let's take a gander at the screens.

RECEIVES ORDER

Receives Customer Purchase Order from client

Each client has own format

Comes via fax, email or web

Different delivery and format for each client

This is the first print in a long line of printing.. I wish the system would do this for me.

I can't attach this important artifact to the customer.

Manud. Excel to track.



SEND INVOICE TO CLIENT

Uses system to generate and send email BUT Uses Outlook to manage

Rabbit Holes: very little "group" processing.

Phew! One order complete! Now I have to manually check all the PRINTED copies in the customer folder to make sure that everything matches.. I hope I don't have to change anything.. better get out my cheat sheet.

Uses Cheat Sheet to manage all process

No system check!

At this point, I pull out the physical customer file with all my prints and MANUALLY check to make sure everything matches. Hope so, because the order has shipped and now I am billing..

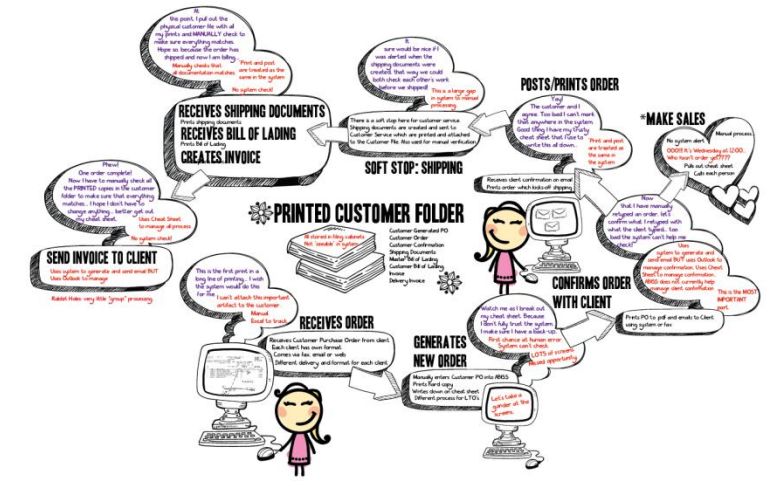
Manually checks that all documentation matches.

*Print and post are treated as the same in the system

No system check!

It sure would be nice if I was alerted when the shipping documents were created, that way we could both check each other's work before we shipped!

This is a large gap in system to manual processing.



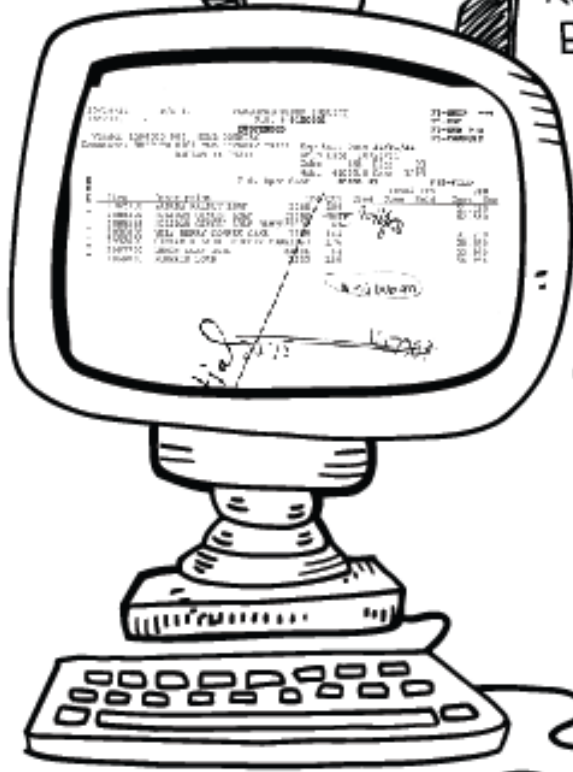
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Manual.
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RECEIVES ORDER

Receives Customer Purchase Order from client
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GENERATES NEW ORDER

Manually enters Customer PO into ABISS
 Prints hard copy
 Writes down on cheat sheet
 Different process for LTO's

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First chance at human error.
 System can't check.

LOTS of screens.
 Missed opportunity.



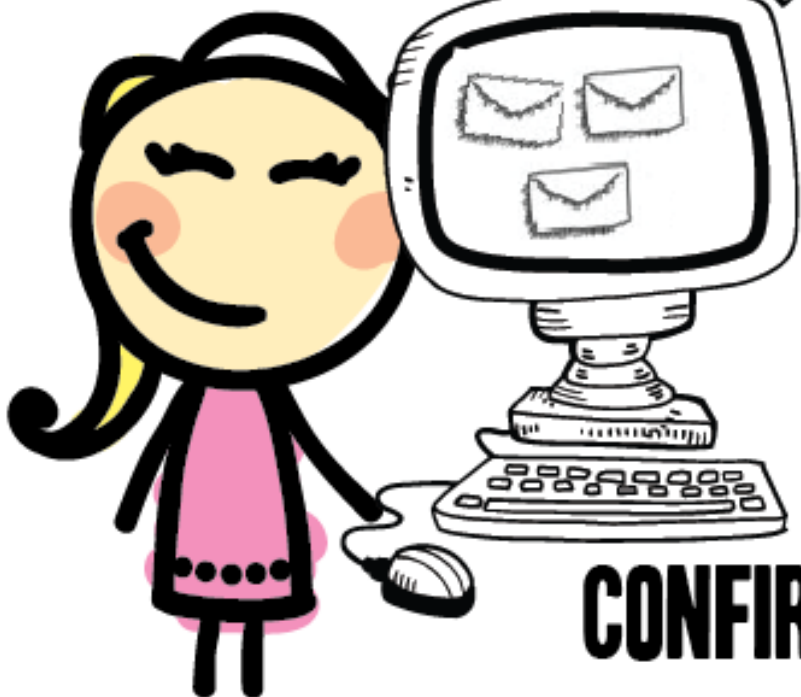
POSTS/PRINTS ORDER

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The customer and I agree. Too bad I can't mark that anywhere in the system. Good thing I have my trusty cheat sheet that I use to write this all down...
'Print and post are treated as the same in the system'

*MAKE SALES

Manual process...
No system alert
000!!! It's Wednesday at 12:00... Who hasn't order yet????
Pulls out cheat sheet
Calls each person

Receives client confirmation on email
Prints order which kicks-off shipping



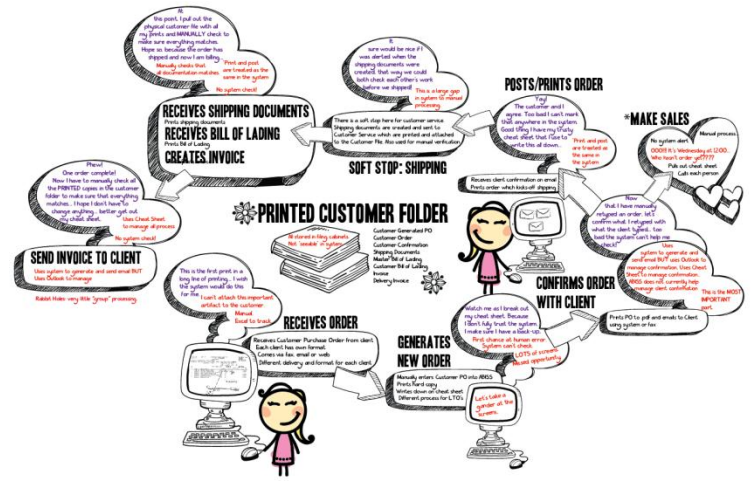
CONFIRMS ORDER WITH CLIENT

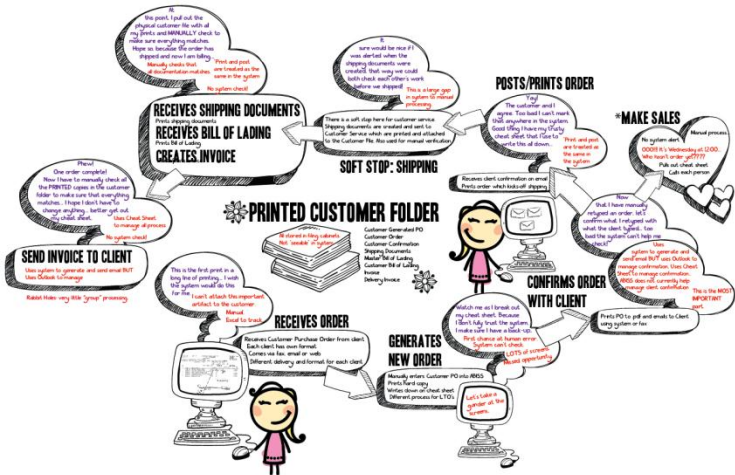
Now that I have manually retyped an order. let's confirm what I retyped with what the client typed... too bad the system can't help me check!

Uses system to generate and send email BUT uses Outlook to manage confirmation. Uses Cheat Sheet to manage confirmation.. ABISS does not currently help manage client confirmation

This is the MOST IMPORTANT part.

Prints PO to .pdf and emails to Client using system or fax





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 Manually checks that all documentation matches.
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 Prints shipping documents
RECEIVES BILL OF LADING
 Prints Bill of Lading
CREATES INVOICE
 Prints/posts invoice

There is a soft stop here for customer service. Shipping documents are created and sent to Customer Service which are printed and attached to the Customer File. Also used for manual verification.

SOFT STOP: SHIPPING

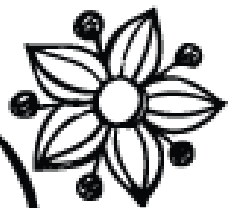
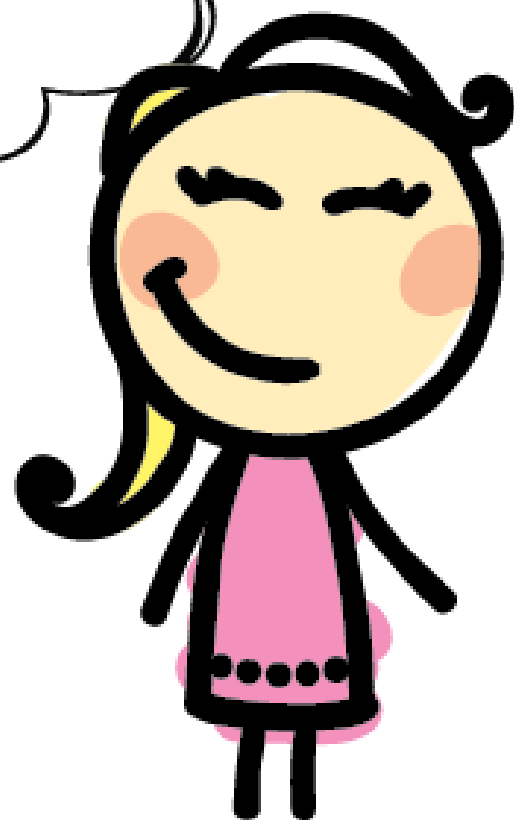
Phew!
 One order complete!
 Now I have to manually check all the PRINTED copies in the customer folder to make sure that everything matches... I hope I don't have to change anything... better get out my cheat sheet.
 Uses Cheat Sheet to manage all process
 No system check!

SEND INVOICE TO CLIENT
 Uses system to generate and send email BUT Uses Outlook to manage

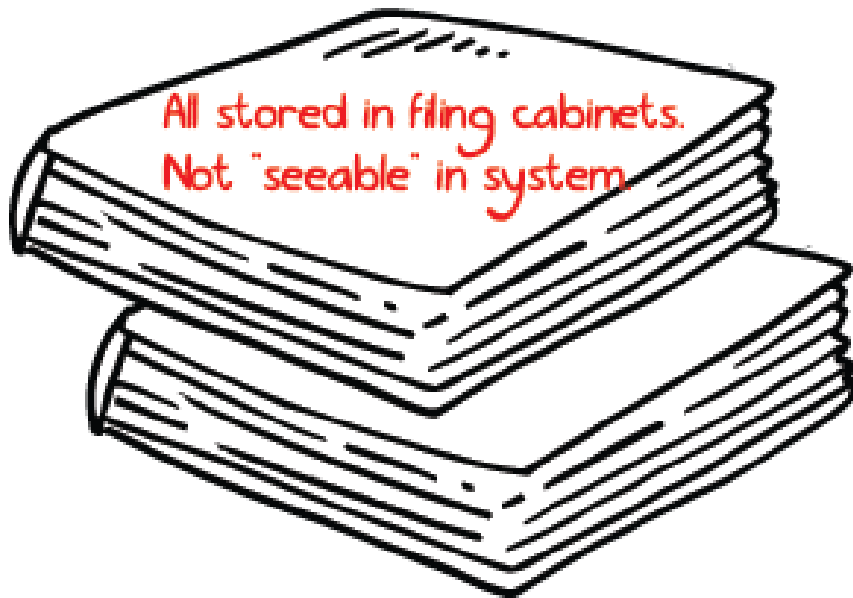
Rabbit Holes: very little "group" processing.

This is how I manage the process, with a double check of printed artifacts and my cheat sheet. The system should be more than a data entry and printing area...

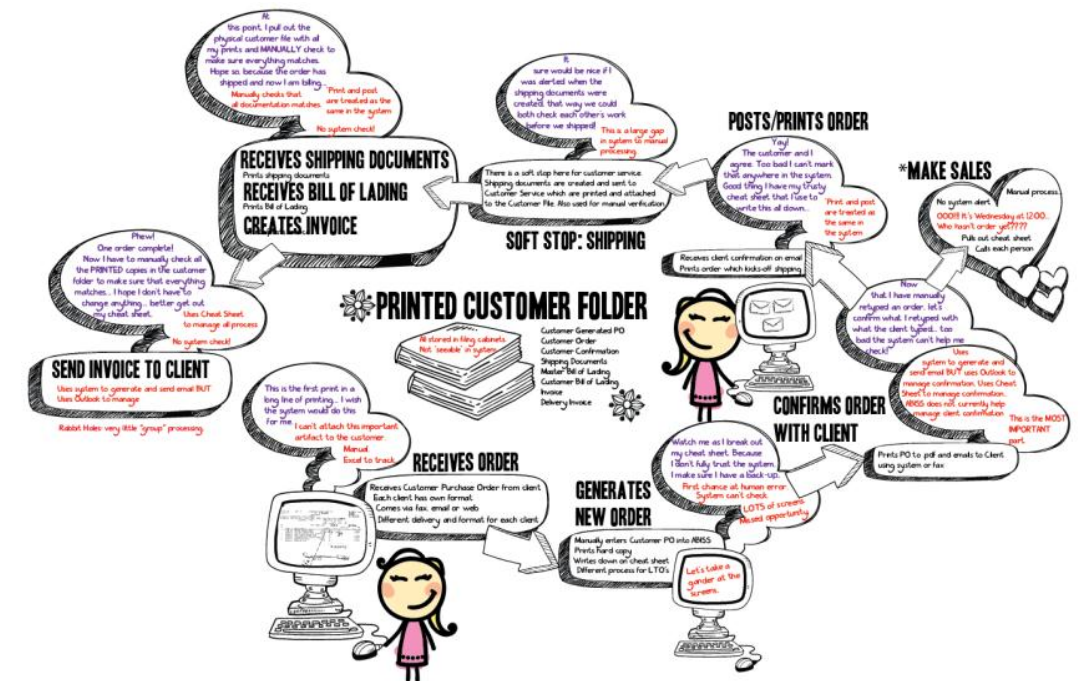
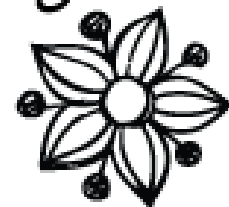
Maybe someday!



PRINTED CUSTOMER FOLDER



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As long as I am dreaming...

Access Invoice by customer

Order history by customer

Work Que...

Interactive Invoices

Interactive Reports

System checks and alerts

Less scrolling through lengthy drop downs

Ways to manage my work in the system

Visual indicators of what is going on...

