Action Plan Design and Implementation

Result You Want for This Process

To develop a structure of how systems should look to provide a template that can be reused repeatedly in the business to harmonize all of the business's systems. In other words, we are creating a system to insure that documenting systems is systemized.

Why Do You Need System Design?

Whether you are aware of it or not, systems exist in your business. Every day you or your employees go about their task in routine ways, successfully accomplishing their tasks. You may admire how a particular employee does such a wonderful job and you may cringe at the prospect of someday loosing that key person along with their well-developed skills. What you may not realize is that this successful employee has been using an Action Plan made up of a collection of individual systems that they use every single day. If you were to document every step of every procedure that this terrific employee uses you could have other "not so terrific" employees use the same techniques and they could be terrific too. In addition, new employees will learn and implement procedures much quicker if they have a detailed description of the steps involved in each task. A compilation of your action plans can even be used as a recruiting tool to demonstrate how easy and stress free transitioning to working for your company will be. All it takes is the determined and disciplined documentation and implementation of Action Plans made up of individual systems.

What Are Action Plans?

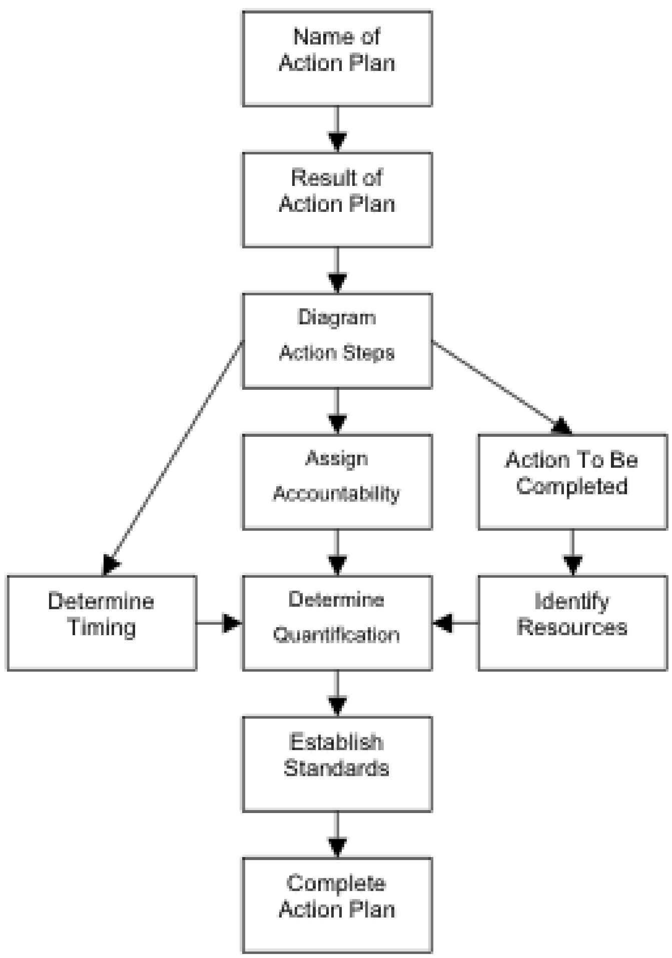
Like the score that the conductor of a major symphony uses to coordinate the activities of the many instruments to produce beautiful music, action plans coordinate the many little activities or systems that go into have a procedure or process completed in your business. Just as the symphony conductor has as his end goal hundreds of very satisfied patrons, an action plan begins with the end, that is, the results. These can be a properly completed forms, a consistent messages presented to all of your customers, or a reliable and consistent billing to ensure proper cash flow. To do this requires a thorough examination of the *Who, What, Where*, *When* and *How* of the process. Communication with everyone affected by the action plan is key since we are very often documenting what is already being done.

Done properly, an action plan will accurately give a picture and guide of what the result will be, what items are physically required to complete the work, what work needs to be done, in what order the work needs to be accomplished, who is responsible for doing it, when it is due, and to what standards it will be held. It is very important to remember that, much like pieces of a puzzle, the action plan being documented must fit with other action plans or confusion and inconsistency will result. One may argue that a very important "How" is "how will this action plan relate or interact with other action plans?"

To Begin, Draw A Picture

The first step in creating an action plan is to plot out each action that takes place in the completion of a result. A legal pad and a pencil are the initial tools to use here. The key is to list each task that takes place and in what sequence. It might be helpful to have the person in the position you are documenting complete this task for you as they go about their work, but be careful that all steps are included no matter how trivial they may seem.

Once the sketch of the tasks are completed, use the drawing feature of a common word processing software program (for a more powerful option, use SmartDraw, available at: www.smartdraw.com) create boxes for each task, process or document. An example of diagramming using the components of the next section, *What Makes Up An Action Plan?*
would look like this:



A useful element of a diagramed action plan is once the plan is implemented and learned by the positions responsible for the results, the diagram can be used as a quick reference to in the event that a reminder is needed. Some businesses have used permanent binder systems to maintain these flow charts and diagrams at the workspace to serve this purpose. An example of this permanent binder system can be found at: www seamarkonline.com Choose Document Organizers.

What Makes Up An Action Plan?

Title: Everything needs a title. Action Plans do too. Make yours clear and descriptive in as few words as possible.

Result: If this were a mystery novel, you would be upset because we would be giving away the end at the beginning. This is not a mystery novel, so be very clear and concise about what result you want this action plan to accomplish.

Logic: Type in a few sentences (or paragraphs, if needed) explaining the logic behind doing this system according to this action plan. Why is this action important?

Materials Needed: Identify all of the physical items which are required to complete the Action Plan. Examples include:

a. Equipment
b. Facilities
c. Supplies
d. Information, scripts,
e. etc.

Accountability: Who will have overall accountability for seeing that the job is completed. (Department Manager, VP of Marketing, etc.)

Reporting Positions: These are the actually positions (not persons) which will actively be involved in the completion of the work. Typically, these position report directly to the position in the Accountability list.

Staff Positions: Staff Positions are other positions involved in the completion of the Action Plan but are not direct subordinates of the position in the Accountability list.

Action To Be Completed: These are the steps or benchmarks of the action plan. This is where the step-by-step procedures are documented. When writing action items be sure to:

- Start with an Action Verb.
- Keep it simple and short.
- Write action items in step-by-step order.
- Be as complete as possible. Do not leave out action items that seem self-evident.

- Avoid tangents or excessive descriptions.

- Use sub-actions, if necessary:
    a.
    b.
    c. (etc.)

  Limit sub-actions to 5 or 6.

Done By: For each individual action list which *position* is responsible for accomplishing the task.

Due By: Whenever a task is assigned, it must have a *specific* deadline. The position completing the task must know when they are accountable for getting the task done. This might be in terms of click time (10 AM), project time (day 4), generic phrases (upon receipt, weekly), or a combination of these.

Quantification: If this is an action you intend to track and quantify, write how the quantification will take place. Explore if this action plan is already being tracked by a report already in place. Example: number of inquiries vs. number of purchases.

Standards: Standards are most easily stated in terms of quality, quantity, and behavior. Keep in mind what your customer is expecting along with the actual behavior when creating standards. Write standards in the "declarative" form, using phrases such as "must be done," "will or shall always be done," "is required," "must be achieved." Create standards that are realistic and enforceable.

Worksheets and Examples

The first document that is included with this chapter is an action plan template that describes, within the plan itself, the steps to making a successful action plan. You can use this example to create your own, initial, plans in a "follow along" manner. Also included is a blank form to use once you have mastered the technique.

Included along with the worksheets are "real life" examples of action plans in use in business today. They are included to inspire you and also illustrate that once you have developed the skill to create your own action plans you can tailor them to your own purpose and design.

How to Use the Action Plan Template

Document 1
Ver. 3-28-07

TITLE:	How to Use the Action Plan Template
RESULT:	To quickly and efficiently create an action plan to document a system and its benchmarks.
LOGIC:	The file Action Plan Template.dot was designed to cause the writer as little problems as possible. Many items are built right into the

	template so you do not have to worry about things like bullets or word placement. The Action Plan Template was also designed to enable the writer to use the outline format for easy-to-read steps.
MATERIALS NEEDED:	
	Equipment Facilities Supplies Information, Scripts

POSITION WITH OVERALL ACCOUNTABILITY:	
REPORTING POSITIONS:	
STAFF POSITIONS:	

#	ACTION ITEMS TO BE COMPLETED	DONE BY	DUE BY
	This is designed to be used with Module 4: MG-0090. This is simply to help you use the template.		
	A few notes: an action plan is a step-by-step guide to completing a series of actions that make up a system. Tying your shoe is a system. The steps involved in tying your shoe are called benchmarks.		
	Section 1: Title, doc name, version		
	To quickly fill these fields:		
	Go to File		
	Properties		
	Type in the title of your action plan in the Title Box on the Summary Tab		
	OK		
	Save the document (the title of the action plan that you have already selected should pop up automatically in the title box.)		
	Hit Control-A		
	Right Click with your mouse		
	Select ! Update Fields		
	Now if you look at your first section, the title, document name and time of the file creation have now been automatically supplied.		
	NOTE: I find that when I am constantly editing an action plan it helps me to update the Ver: date after each edit. To do this: save the document, left click on the date, right click, ! Update Field. This way, if you have copies of all your versions printed out, you can instantly see which is the most recent.		
	Section 2: Result, Logic, Materials Needed		
	Type in one sentence saying what the ultimate result of this system is.		
	An example: To ensure parental support by quickly and efficiently tying my shoe.		
	Type in a few sentences (or paragraphs if needed) explaining the logic behind doing the system according to this action plan. Why is this action important?		
	An example: By correctly tying my shoe, the risk of serious damage to others and myself had I tripped.		
	Enter all materials you might need for completing this system.		
	Equipment: e.g. Computers, hammer		

	Facilities: e.g. Garage, kitchen		
	Supplies: Paper, pen, nails		
	Information: FORM: How to build a tree house, Customer name		
	Section 3: Responsible Parties		
	Look at your organization chart		
	Start with the staff position- who is the actual person completing the benchmarks needed for this system? The cashier? The bottle washer? All hood techs. Type in the position title, not the person. List any non-managerial staff here. If managerial staff does the work, this box is left empty.		
	Reporting Position: on the organization chart, who is the person to whom the staff person reports? A manager? Supervisor? Type their title here.		
	Position with overall accountability: on the organization chart, who is the person to whom the reporting person reports? Usually this will be an upper-management position. It could even be the President or CEO. Ultimately, if the action described in this plan is incorrect, it is this person's responsibility.		
	Section 4: # and Action Items		
	This section is designed to outline the steps or benchmarks of the system.		
	Built into the template are formatting styles to help you achieve the outline look.		
	To change the style of a cell,		
	Click on the cell to highlight it.		
	Click on the arrow next to the style window (this is located on the formatting toolbar, far left side or directly to the left of the font listing)		
	Descriptions of the styles needed to outline an action plan.		
	Level 1 and Bullet 1: These are used together for items that are main points or section headings.		
	Level 2 and Bullet 2: These are used together for sub-headings or more descriptive instructions for the Level 1 item.		
	Level 3 and Bullet 3: These are used together for expanding on the details of Level 2.		
	Bullet 4: If necessary, there is a fourth bullet style for expanding on a level 3 item. To save space on the table, there is not a Level 4 style. (a fourth level means a larger indent and thus more space used)		
	NOTE: In cases where you will not need to outline elaborate steps with headings and sub-headings and details, it is easiest to simply leave the # column alone and then format the Action Items column to the style Normal. This eliminates the need for extra steps or unnecessary headings.		
	Section 5: Done By and Due By		
	Done By: Identify by position, not by person, who will be accountable for each step.		
	Position of responsibility may change with each line.		
	For many lines done by the same position: to keep from cluttering the document with too many characters, simply use the "quote" sign in the cells following.		
	Due By: Establish the timing for each step, certain steps only, or for the system as a whole, as appropriate.		

	This might be in terms of click time (10 am), project time (day 4), generic phrases (upon receipt, weekly), or a combination of these. .		
	Due by may change with each line.		
	For many lines due at the same time: to keep from cluttering the document with too many characters, simply use the “quote” sign in the cells following.		
	Section 6: Quantification		
	If this is an action that you intend to track and quantify, write how the quantification will take place.		
	You quantify and track to know if you are getting the result you want from your system. It gives you that objective view.		
	Example: Number of inquiries vs. number of purchases.		
	Section 7: Standards		
	List the standards of service. These are the standards for performance of the system and behavior of the staff operating the system.		
	Standards are most easily stated in terms of quantity, quality, and behavior.		
	If it is key to producing a successful result, then you’ll need to set standards for it.		
	Example: Always be patient and courteous to the customer. Or Never lift a heavy object without using the proper lifting technique.		
	Final Notes and Advice		
	When you have finished documenting a system, delete any extra table rows. The idea is to keep the document looking clean.		
	The easiest way to delete is to select the rows, right click, and select delete rows.		
	Bringing the quantification and standards onto the same page as the action items is one way to shorten the number of pages.		
	Simply delete the page break located after the action items table.		
	When outlining the steps for computer work, try to make screen selections as noticeable as possible.		
	One way to do this is to make sure you put each step on it’s own line, don’t jumble them up into a paragraph.		
	Another way is to bold those words that refer to an actual computer action or computer choices. Simply write in the word if further instruction is not necessary. (this is assuming that the person executing the action has some knowledge of computers) Example: (changing the action plan name)		
	File		
	Properties		
	Type in the title of your action plan in the Title Box on the Summary Tab		
	OK		
	Save		
	Control-A		
	Right Click		
	! Update Fields		

#	QUANTIFICATON

POSITIONING SYSTEMS
STRATEGIC DISCIPLINE

Action Plan Design
and Implementation

#	STANDARDS

ACTION PLAN TEMPLATE

Document4
Ver. 8/8/2017 2:35:00 PM

TITLE:	ACTION PLAN
RESULT:	
LOGIC:	
MATERIALS NEEDED:	
	Equipment Facilities Supplies Information, Scripts

POSITION WITH OVERALL ACCOUNTABILITY:	
REPORTING POSITIONS:	
STAFF POSITIONS:	

#	ACTION ITEMS TO BE COMPLETED	DONE BY	DUE BY
1	**1**		
1.1	2		
1.2	3		
2			
2.1			
3			
4			
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7			
8			
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21			

#	QUANTIFICATION
1.	
2.	
3.	
4.	

#	STANDARDS
1.	
2.	
3.	
4.	
5.	
6.	
7.	
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10.	
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12.	
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19.	
20.	

Examples

Repair Ticket Order ACTION PLAN

MG-0090 ACTION PLAN (Current)
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TITLE:	Repair Ticket Order Process
RESULT:	To provide clear communication to our customer (internal and external) repair orders so that they can be efficiently completed in an acceptable time frame.
LOGIC:	Customer repairs require a knowledge of the problem the customer is experiencing, by diminishing the number of options, identifying the symptoms repair techs can quickly diagnosis the problem saving customer complaints, returns and satisfying customers and creating a harmonious work environment.
MATERIALS NEEDED:	
	Equipment: Computer, Ideal Software, customer's equipment Facilities Supplies: Paper for printing form Information, Scripts. Script to Diagnosis Customer's problem.

POSITION WITH OVERALL ACCOUNTABILITY:	Store Manager
REPORTING POSITIONS:	Front Desk
STAFF POSITIONS:	Service Techs

#	ACTION ITEMS TO BE COMPLETED	DONE BY	DUE BY
22	**Greet customer upon entry**	Front Counter	Upon customer entering store
23	Ask customer for nature of their problem, (service or new equipment or other), When Identifying as service repair, make sure customer intends to get repair completed at our location. If not they may be asking for an estimate. If necessary provide an estimate.	"	Immediately
24	When customer identifies that he wants Valdosta Power to conduct repair ask the following questions to insure we have an accurate description of the nature of the problem so the service techs can save time repairing their equipment. (Follow the script provided for asking these questions)	"	"
25	**Begin by opening the repair form on the computer to enter the customer information.**	"	"
26	**What is your address?**	"	"
27	Can you provide me with the **model, make, brand and color** of your equipment? (If unable to, go with the customer to identify this with them)	"	"
28	Can you be as specific as possible about the **nature of the work** you would like our service people to repair?	"	"

29	Is your equipment able to **run** now?	"	"
30	(If it's not able to run now Ask) When was the last time it ran?	"	"
31	Can you **turn it over** with the key/ignition?	"	"
32	(If hard to Start Ask) When is it **difficult to start** when the equipment is **hot, cold or in both situations**?	"	"
33	(If Equipment does start, **how does it run**? (Get as best a description as you can of the nature of their problem)	"	"
34	Identify if there are **any other problems** that we need to be aware of with their equipment beyond their present concern, or in addition to the one they've identified.	"	"
35	At this point make a **physical inspection** of the equipment. If there is anything that appears in disrepair or damaged make note of it on the repair order, and if necessary make sure the customer is aware of the damages to their equipment and your notations to make them know Valdosta is not responsible for them.	"	"
36	**Provide explanation of Valdosta Power Equipments Charges for services**: We have a minimum service charge of $50 on all repairs. At what point beyond that amount would you like us to contact you. Is there a limit on the extent of money you want to invest in this machine, what is that limit and at what point do you want us not to exceed putting in additional expense into repairing your equipment?	"	"
37	**Thank customers** for bringing their equipment to Valdosta Power Equipment. If possible provide them with an idea of when their repair will be completed. Let them know that we always contact them when it is completely repaired. Also provide them with the information on the **warranty** for our services.	"	"
38			

#	QUANTIFICATION
1	All orders will include the following information on ticket order: make, model, brand and color if possible
2	Customer complete Address and phone number
3	Nature of work to be completed (specific as possible)
4.	Whether the equipment currently is able to run, or start.
5	When if any difficulties it has in starting or running
6	If equipment runs, how does it sound or the nature of the operation difficulty
7	Identify if there are any additional problems with the equipment
8	Physical inspection of unit, noting any damages or disrepair that is not Valdosta's responsibility
9	Limit of spending that Customer is willing to invest on repair of equipment
10	Thank you for their patronage.
11	Estimate on repair time and promise to contact them when repair is complete.

#	STANDARDS
1.	All customers will be treated with the utmost professional courtesy, remember your demeanor and attitude reflect on everyone at Valdosta Power Equipment.
2.	Handle all complaints in soft-spoken manner. If customer is upset, acknowledge their being upset. Don't move on until they have exhausted their complaint. Continue to provide "You still sound upset" until customer has expunged all of their emotional grief and you can deal with them on a stable level. If you are unable to deal with the customer's complaint, offer to have a manager speak to the customer.
3.	All entry of data needs to be fully explained in as brief of terms as possible, but not so that there is any question of the nature of the customer's problems.
4.	Make sure the customer understands that the more we know about their problem the sooner we can solve it.
5.	Physically inspect the equipment
6.	Follow the script provided at the counter to make sure all of the information of repair needs is provided.

Inventory Receiving System

Inventory Receiving System
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TITLE: **Inventory Receiving System**

RESULT: All orders are received into the store and the company database in a timely and accurate manner.

LOGIC: Proper receiving of product orders allows for consistent product availability, accurate pricing, and total customer satisfaction.

MATERIALS NEEDED: *Equipment:* Computer, Keystroke software, workspace, stapler, and calculator.
Facilities: Store or office
Supplies: Paper and pen
Information and Scripts: Purchase order, packing slip, Oreck order confirmation, invoice, updated and current retail price list.

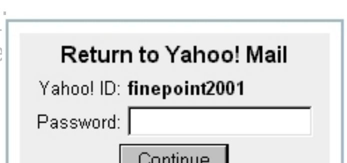
POSITION WITH OVERALL ACCOUNTABILITY: **VICE PRESIDENT OF RETAIL OPERATIONS**

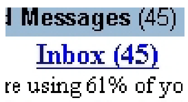
REPORTING POSITIONS: Store Manager

STAFF POSITIONS: Sales Associate, Service Associate, Book keeper

#	ACTION ITEMS TO BE COMPLETED	DONE BY	DUE BY

1	Receive order from shipping company (UPS, FedEx, trucking company, inter-store personnel).	Store Manager, Sales Associate, Service Associate	
2	Check for damage.	"	Upon Delivery
2.1	Check for obvious damage to packaging—if damaged, check interior contents.	"	
2.2	Segregate damaged package for claim and replacement procedure.	"	
2.3	Detail damage or shortage of merchandise on Inventory Damage or Shortage Report (see attached form)	"	
2.3.1	Directions for Inventory Damage or Shortage Report (see example at the end of this document). This form is used to document damage to product or product missing from a box or package when the packing slip reports that the item should have been included. First, check the box of the store where the damaged or shorted product was delivered. Using packing slip from damaged or shorted package exterior, fill in the date of original order, original purchase order number and your name under "person authorizing return." Fill in the name of the Vendor. If the vendor is not Oreck, fill in the address and phone number. In the main body of the report, accurately list the quantity of damaged or shorted product, the vendor invoice number, part number and the description as it appears on the packing slip. If the unit price and total amount are known, list them as well. Always describe the damage to the product or quantity of shortage in the box at the bottom of the report. Fax the Inventory Damage or Shortage Report, the packing slip, and the original purchase order to the company offices where the claim process will be handled by the VP Retail Operations. File the PO, packing slip, Inventory Damage or Shortage Report and any other related paperwork or notes regarding this order in the Damaged or Shorted Orders file so that is it safe and available while we correct the situation with our vendor.	Store Manager Sales Associate Service Associate	When damaged packages are received.
3	Retrieve Oreck order confirmation email to obtain quantity shipped, shipping costs and updated costs.	"	Three days after order is submitted to Oreck
3.1	Using mouse, double left click Yahoo Mail on computer desktop. 	"	
3.2	Connect to internet. Place cursor over Connect click left mouse button. 	"	
3.3	Place cursor over Check Email icon and click left mouse button once. 	"	



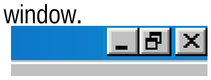
	Type in password (oreck) and place cursor over Continue press left mouse button.		
3.4	Single left click Inbox. 	“	

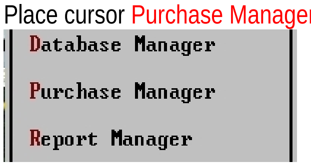
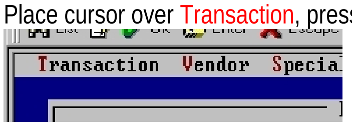
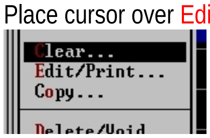
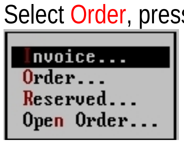
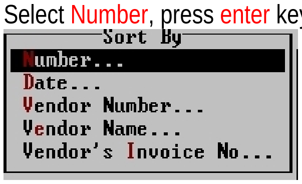
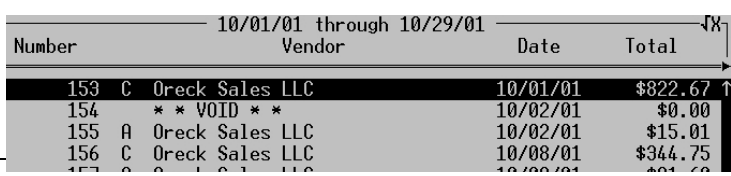
3.5	Find email message that matches purchase order double left click on the underlined Your ORECK CORPORATION Order#…, the order confirmation will appear. Print the order confirmation by placing cursor over the Print icon and left clicking the mouse once.	"	

☐	ORECK CORPORATION	Wed 10/24	5k	Your ORECK CORPORATION Order # 166
☐	ORECK CORPORATION	Wed 10/24	5k	Your ORECK CORPORATION Order # 158

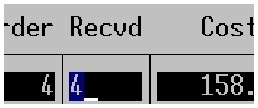
The Oreck order confirmation will look like this but will also have advertising at the top.

```
Shipping Address:

ORECK FLOOR CARE-LINCOLN
2917 PINE LAKE RD
LINCOLN, NE  68516-6032

-----------------------------------------------------------------
Item                     Item                  Quantity    Product
Description              Number                 Shipped      Total
-----------------------------------------------------------------
BUSTER B 1000 BLACK HEP  BB1000DB                     1    $100.00
NON SALES DISCOUNT       DISC                         1     $35.50-
XL21 C-HDL HEPA LIGHT B  XL21-600ECB                  4    $998.00
4 PK UNIT, DEALER LT GR  XL2610HH                     4    $632.00
WHITE BUSTER B           BB870-AW                     4    $278.40
-----------------------------------------------------------------
                               Product Total:           $1,972.90
                         Shipping & Handling:              $52.45
                               Invoice Total:           $2,025.35
                          Pmt:  VI   48020942           $2,025.35
                                  Amount Due:                $.00
-----------------------------------------------------------------
Package Information
```

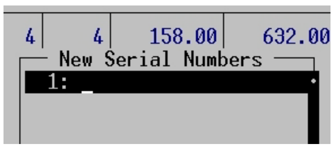
3.6	Exit from email system by left clicking the X in the upper right corner of the window. 	"	
4	Prepare purchase paperwork.	"	Upon delivery
4.1	Remove packing slip from plastic sleeve on exterior of one of the packages.	"	
4.2	Collect purchase order (from orders pending file), packing slip, Oreck order confirmation, and invoice.	"	
4.3	Verify that quantity received matches quantity ordered.	"	
4.4	If not, report variance on Inventory Damage Exception Report—fax this report to VP of Retail Operations. See instructions 2.3.1.	"	
4.5	Compare the product cost of each item on purchase order to order confirmation or invoice.	"	
4.6	Write corrected cost of item to the right of the individual cost on the purchase order.	"	
5	Entering Serial Numbers.	"	"
5.1	Inspect all packages for serial numbers printed on the exterior.	"	
5.2	Write down all serial numbers on a legal pad for use when entering them into the Keystroke software in the next step.	"	

6	Purchase Order Software. *Note: to return to the beginning or to exit from any component of this software, press the Escape (Esc) key until you are where you would like to be.*	"	"
6.1	Open Keystroke cash register software. Double click left mouse button on the Keystroke icon on the desktop.  Type in your employee number, press enter key once: 	"	
6.2	Place cursor Purchase Manager, press enter key once: 	"	
6.3	Place cursor over Transaction, press enter key once: 	"	
6.4	Place cursor over Edit/Print, press enter key once: 	"	
6.5	Select Order, press enter key once: 	"	
6.6	Select Number, press enter key once: 	"	
6.7	Choose the purchase order number for the shipment that you are entering by placing cursor over the correct purchase order number and clicking the left mouse button once. 	"	

7	**Entering received items into the purchase order.**	“	“
7.1	The system will automatically begin on the first line of the purchase order. Press Tab until cursor is at Recvd column.	“	



7.2	Enter actual quantity received for that item.	“	
7.3	*If serial number window appears, accurately enter the serial numbers for that item.*	“	

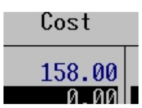


Enter as many serial numbers as there are of that product. When the number of serial numbers reaches the quantity received, this window will disappear.

7.4	Update product cost, if necessary, so that the prices we pay for our products are accurate. Divide the Product Total by the Quantity Shipped to arrive at the individual cost of each item. If this figure differs from the product cost on the original purchase order, update the product cost. Example: Four White Buster B canister vacuums were shipped at a total of \$278.00 (\$278.00 / 4 = \$69.50)	“	

Item Description	Item Number	Quantity Shipped	Product Total
BUSTER B 1000 BLACK HEP	BB1000DB	1	\$100.00
NON SALES DISCOUNT	DISC	1	\$35.50-
XL21 C-HDL HEPA LIGHT B	XL21-600ECB	4	\$998.00
4 PK UNIT, DEALER LT GR	XL2610HH	4	\$632.00
WHITE BUSTER B	BB870-AW	4	\$278.40

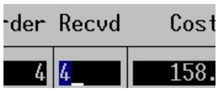
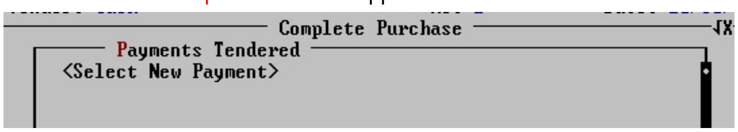
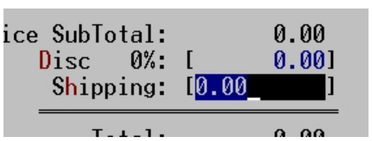
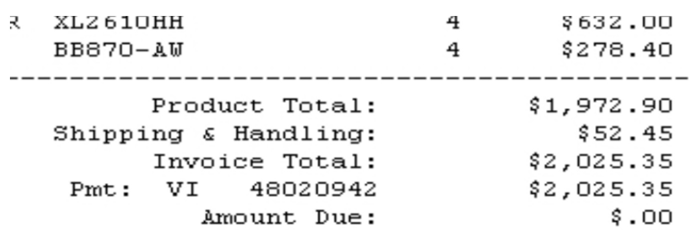
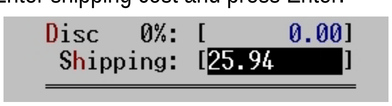
Enter this new or different figure under the cost column.

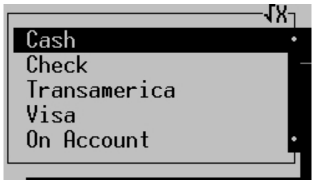
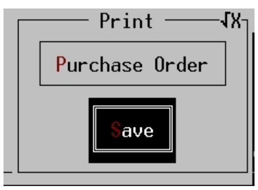
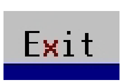
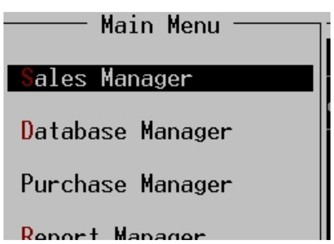


7.5	Press Enter to move to next item. Continue to last product.	“	
8	**Purchase discount for Oreck orders.**	“	“
8.1	After last item, enter Oreck purchase discount. This discount is a credit given for paying in advance for our purchases—this discount significantly affects our profits. Locate the Non Sales Discount on the Oreck order confirmation.	“	

Item Description	Item Number	Quantity Shipped	Product Total
BUSTER B 1000 BLACK HEP	BB1000DB	1	\$100.00
NON SALES DISCOUNT	DISC	1	\$35.50-
XL21 C-HDL HEPA LIGHT B	XL21-600ECB	4	\$998.00
4 PK UNIT, DEALER LT GR	XL2610HH	4	\$632.00
WHITE BUSTER B	BB870-AW	4	\$278.40

8.2	On blank line, press Insert (INS) key (this key is to the right of the Enter key on the keyboard).	“	

8.3	Type DISC, press Enter.  	"	
8.4	Tab to Recvd column, enter 1.  	"	
8.5	Tab to Cost column, enter discount amount as a negative number (example: --13.89)  	"	
8.6	Press Enter until Complete Purchase appears.  	"	
9	Entering shipping costs.	"	"
9.1	Move cursor over Shipping, with left mouse button, single click on the 0.00 to the right of Shipping.  Locate shipping cost on the Oreck order confirmation.  Enter shipping cost and press Enter.  	"	
10	Purchase payment. How we pay for our orders.	"	"
10.1	Place cursor over Payments Tendered, single left click to highlight Select New Payment.  	"	

10.2	Press Enter and select payment listed on original purchase order (this will most often be Visa, although sometimes we use On Account to make use of credits we have accumulated). 	"	
11	**Printing out the completed purchase order.**	"	
11.1	Press the Enter key until Print window appears. 	"	
11.2	Press Enter to print completed purchase order.	"	
11.3	Press Save. 	"	
12	**Prepare for next transaction.**	"	Upon completion of database entry.
12.1	Move cursor to Exit, select Sales Manager and press the Enter key.  	"	
13	**Complete purchase order paperwork.**	"	"
13.1	Stack and staple purchase order paperwork in the following order (top to bottom): Completed purchase order, Oreck order confirmation, packing slip, original purchase order, and invoice.	"	
13.2	To maintain consistency in our record keeping, place completed forms at the back of the Purchase Orders Received file in the filing cabinet.	"	
14	**Prepare product for sale or storage.**	"	"
14.1	Using Price Label System, print price stickers and place on appropriate products.	"	

14.2	Place new product on the shelves in front sales area or in backroom storage area.	"	
15	**Fulfill special order requests.** *Periodically, we will receive a request for an item that we will not regularly carry. These items will be paid for in advance and "special ordered" for our customer from Oreck or other product suppliers. We will segregate these special ordered items and notify our customer within 24 hours of our receiving of this item.*	"	"
15.1	Review special order file and separate requested products.	"	
15.2	Securely attach special order request to product with adhesive tape.	"	
15.3	Notify customer of special order arrival within twenty- four hours of product arrival.	"	

#	QUANTIFICATON
5.	Product quantities are accurately entered.
6.	All product costs are updated.
7.	Purchase discounts are transferred from the Oreck order confirmation to the purchase order.
8.	Shipping costs are included.
9.	Contact customers waiting for special ordered products immediately.
10.	Payment options are always Visa unless clearly noted on the original purchase order.
11.	Damaged products or packaging is documented on the Inventory Exception Report.

#	STANDARDS
21.	Total customer satisfaction.
22.	Processing the receipt of product delivery will occur immediately.
23.	Care will be taken to enter data accurately.
24.	Serial numbers will be double-checked before entering into the database.

Inventory Damage or Shortage Report:

A Fine Point Enterprise

Inventory Damage or Shortage Report

ORECK
Floor Care Centers

☐ Lincoln, Nebraska
☐ Sioux City, Iowa
☐ ________________

Date	
Order Date	

Our Original PO No.	Return Authorization No.
Shipping Charges	Person Authorizing Return

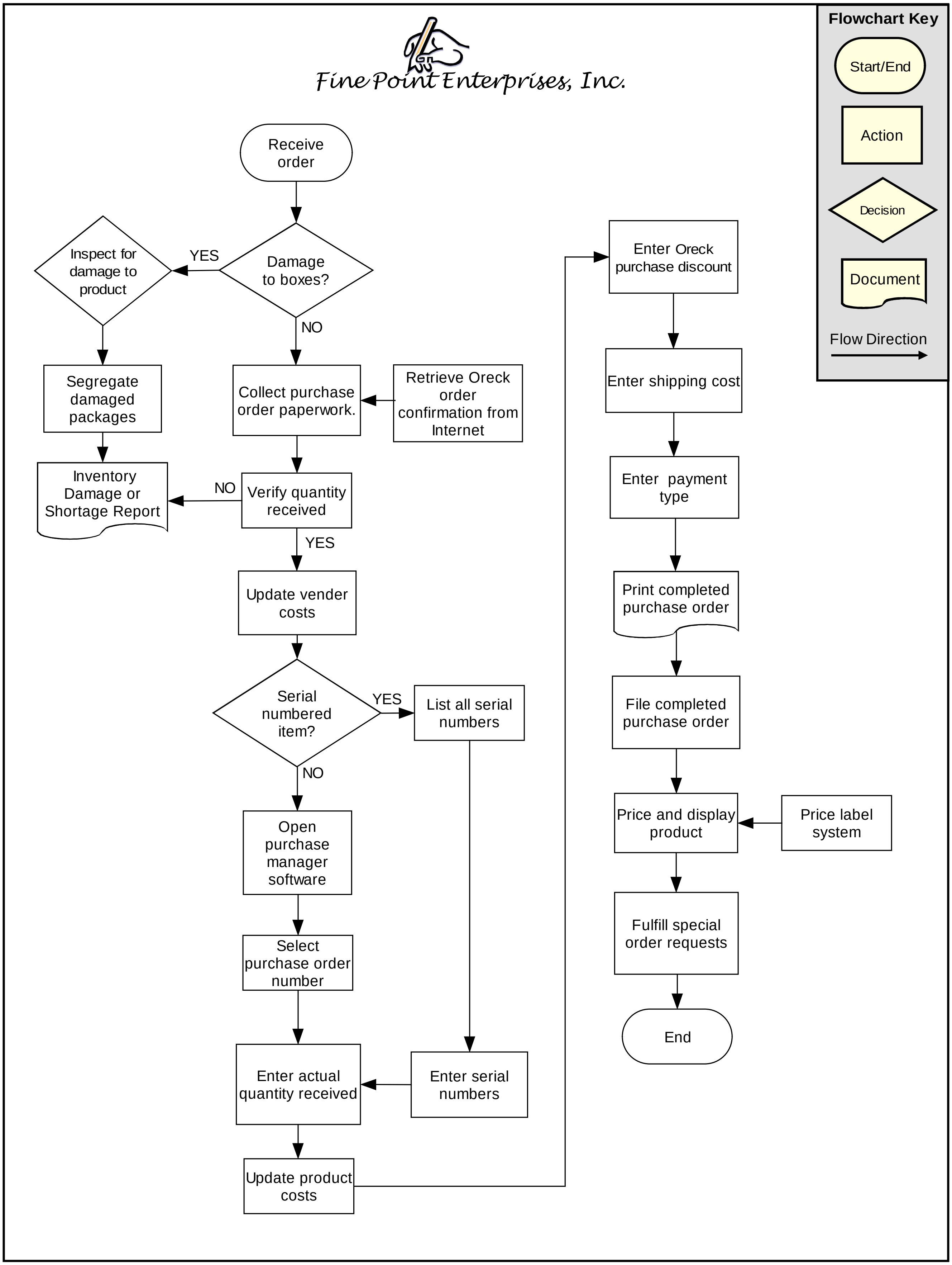
Vendor: ____________________

QTY Returned or Missing	Vendor invoice number	Part Number	Description	Unit Price	Total Amount

Description of Damage		
☐ Damaged	SUB-TOTAL	
☐ Missing	TAX	
	HANDLING/ SHIPPING CHARGES	
	TOTAL	

This form is for internal company use. Please include vendor supplied return authorization form when returning product.

Subject:	Inventory Receiving Procedure	Author:	Jim Cox
Date:	October 24, 2001	Project:	Operations Manual



Notes: