



# Training Manual

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# Introduction

Hello. Welcome to Sweet Production Inc. We are excited to have you as part of our team. Sweet Production Inc. is a new wholesale bakery that supplies most of the bay area with bread and dessert products, and we need you to assist us in our growing business. We hope that you are a motivated and passionate individual with a bright professional attitude to assist us in our expansion.

While at Sweet Production Inc., we hope that you become comfortable with our team. Please do not hesitate to ask any questions. Asking questions is the key to this position, and your coworkers are here to help you. It is better to ask a question about an item instead of guessing and sending the wrong item. As a customer service agent, you are responsible for communicating with customers on the phone, fax, and email, entering orders into MAS 90, resolving any product and/or service problems, sorting invoices, and all other office duties that may be assigned.

Inside of this packet, you will find instructions on how to successfully navigate through MAS 90, which is the software we use to facilitate orders and organize information. Please keep in mind that this packet does not contain everything you need to know. This is only a guide to get you started. You will also find a phone list, a floor map, and product codex (as attachments) that will guide you in the right direction.

Again, welcome to Sweet Production Inc. and don't forget to try a pastry!

# Phone List

<u>Name</u>	<u>Phone extension</u>	<u>Email</u>
Al.	30	name@sweetpinc.com
A.	38	name@sweetpinc.com
	34	name@sweetpinc.com
Ca.	35	name@sweetpinc.com
Doreen	36	doreen@sweetpinc.com
Hi.	41	name@sweetpinc.com
J.	33	name@sweetpinc.com
So.	26	name@sweetpinc.com
Te.	25	name@sweetpinc.com
Tr.	29	name@sweetpinc.com
V.	44	name@sweetpinc.com
Order Desk	(650) 613-7777	order@sweetpinc.com

## Transferring Calls

- Step One:** While the caller is still connected, press Transfer button on phone
- Step Two:** Dial the desired extension
- Step Three:** Wait for the word “Transferred” to appear on phone display
- Step Four:** Hang-up the receiver

## Check Voicemail

- Step One:** Push Line 1 button to use outside line (Any open line is okay to use.)
- Step Two:** Push V. Mail button on the upper, right corner of the phone
- Step Three:** Listen for ring in receiver and wait for voicemail to answer
- Step Four:** Push Sweet P. button on phone for password
- Note:** *If you cannot access voicemail, ask for assistance.*

## Learning the Item Codes

Item codes can be read from left to right. Most item codes are created by category, size, flavor, and number of cuts. Below is a basic view of how codes are created. A complete list of item codes will be provided to you on your first day of employment.

### Product Chart:

1st Digit	Category
2nd Digit	Size
3rd Digit	Description / Flavors
4th Digit	Description / Flavors
5th Digit	Cuts
6th Digit	Cuts

### Categories:

1	Cake
2	Breakfast Pastry
3	Loaf / Bundt Cake / Coffee Cake
4	Pie / Tart / Crisp / Cobbler / Bar / Corn Bread
5	Cookie
6	Bread
7	Custom Cake
8	Bagels & Donuts

### Example:

	Category	Size	Description	Flavor	Cut	Result
<i>Item Code</i> →	2	6	02	47	N	260247N
	Breakfast Pastry	Mini	Muffin	Assorted	No Nut	Mini-Muffin-Asst No Nuts
	Category	Size	Description	Cut	Cut	Result
<i>Item Code</i> →	1	4	06	24	N	140624NN
	Cake	Half Sheet	Brownie	24 cut	No Nut	Brownie-1/2-No Nut-24c

**Note:** *There are some items that will not have codes, but we have made them before. These items will have “78” codes. A complete list can be found at: <Client List and Special Order.ods> DO NOT CREATE NEW or 78 CODES WITHOUT APPROVAL FROM DOREEN.*

## Finding MAS 90 Modules

When MAS 90 is opened for the first time, you will need to find the modules required for customer service. You can drag modules from the file location shown below to the tool bar. The following images will show the location of some modules, but they may change over time.

### Sales Order Entry (See Figure 1.1)

Sage ERP MAS 90 → Modules → Sales Order → Main → Sales Order Entry

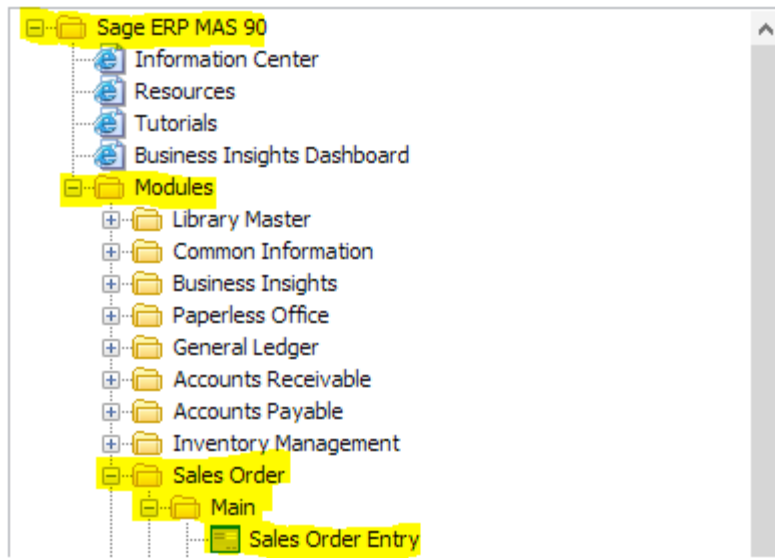


Figure 1.1

### Customer Maintenance (See Figure 1.2)

Sage ERP MAS 90 → Modules → Accounts Receivable → Main → Customer Maintenance

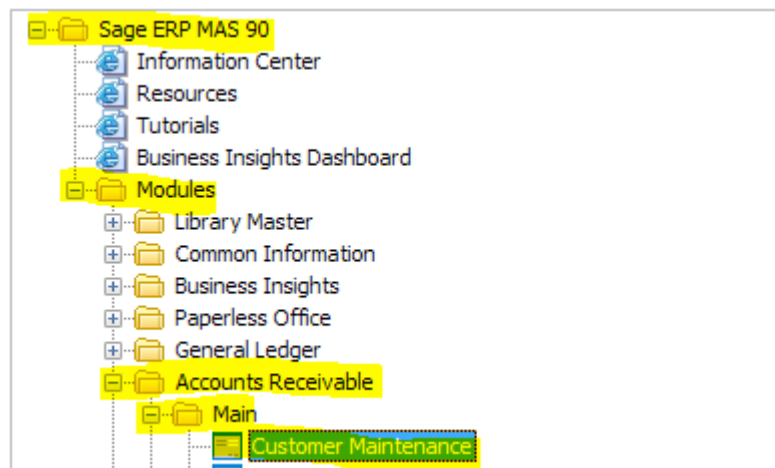


Figure 1.2

## **Invoice Data Entry** (See Figure 1.3)

Sage ERP MAS 90 → Modules → Accounts Payable → Main → Invoice Data Entry

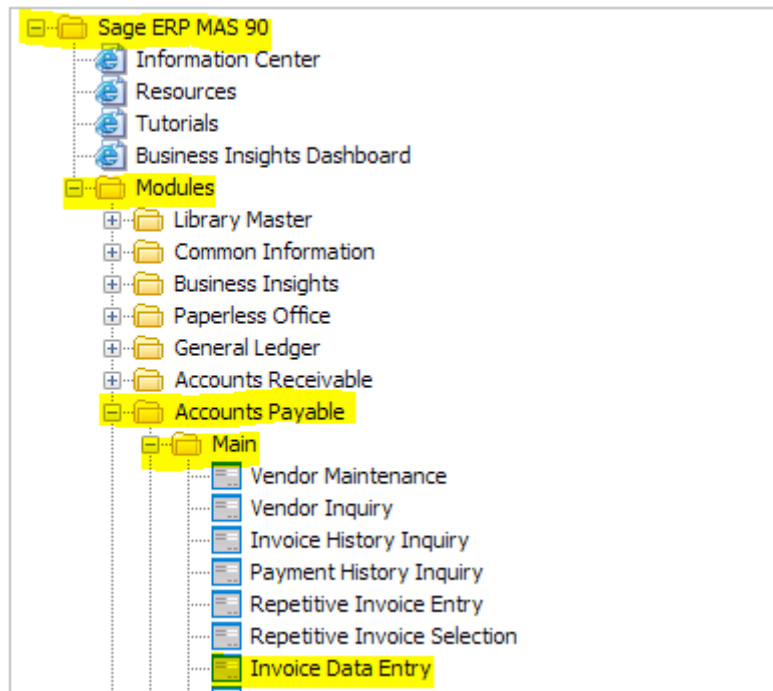


Figure 1.3

## **Item Maintenance** (See Figure 1.4)

Sage ERP MAS 90 → Modules → Inventory Management → Main → Item Maintenance

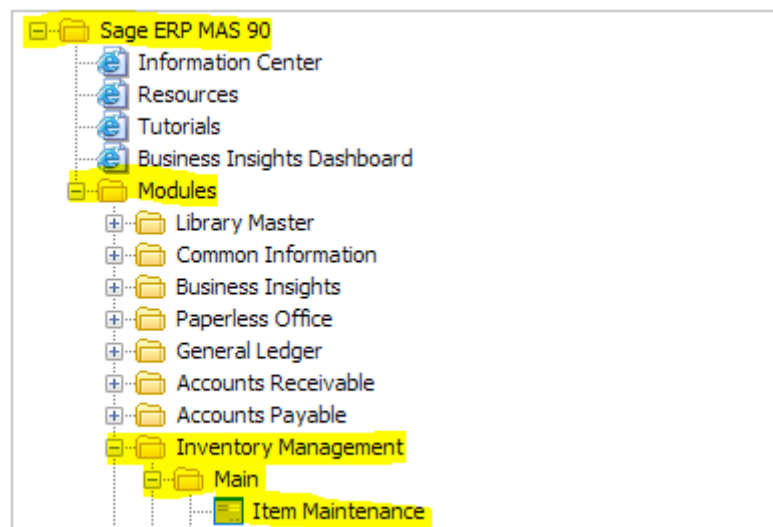


Figure 1.4

## **Auto Generate Invoices Selection** (See Figure 1.5)

Sage ERP MAS 90 → Modules → Sales Order → Main → Auto Generate Invoices Selection

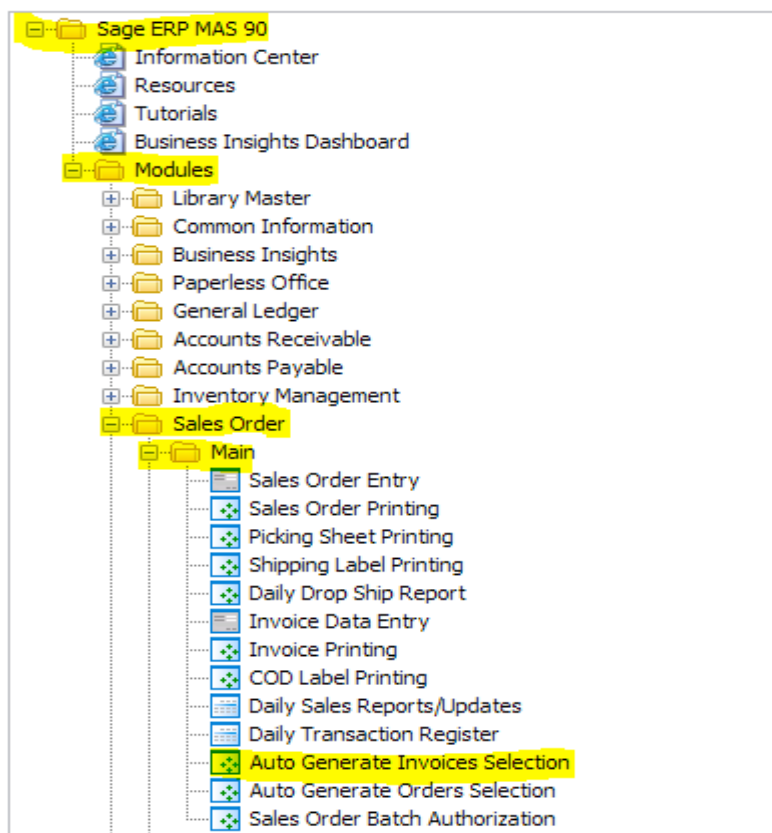


Figure 1.5\*

## **Daily Sales Reports/Updates** (See Figure 1.5\* above and Figure 1.6 below)

\*Sage ERP MAS 90 → \*Modules → Sales Order → Main → Daily Sales Reports/Updates

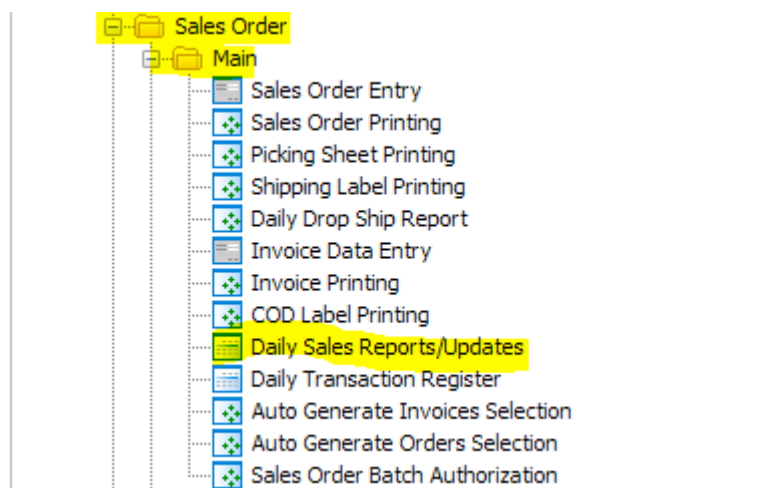


Figure 1.6



## **Invoice Printing** (See Figure 1.7)

Sage ERP MAS 90 → Modules → Accounts Receivable → Main → Invoice Printing

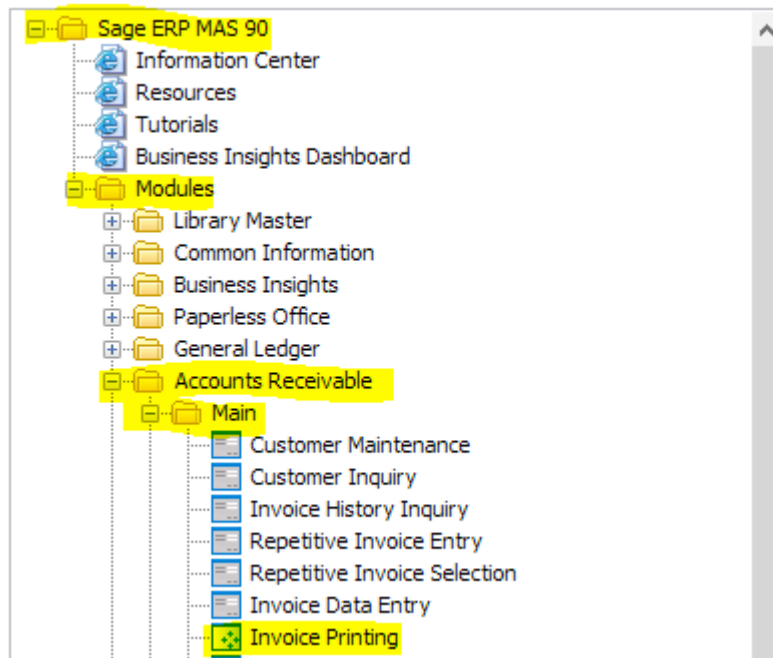


Figure 1.7

# Creating Sales Orders

Entering orders is an easy process, but making mistakes can be just as easy. By entering orders, you will become familiar with the item codes. Most customers will NOT provide the item code. It is your job to understand and distinguish what the customer needs. Follow the below steps to create new sales orders.

**Step One:** Open MAS 90

**Step Two:** Open the form Sales Order Entry (see Figure 2.1)

**Note:** This module can also be found by following Figure 1.1 of Finding MAS 90 Modules.

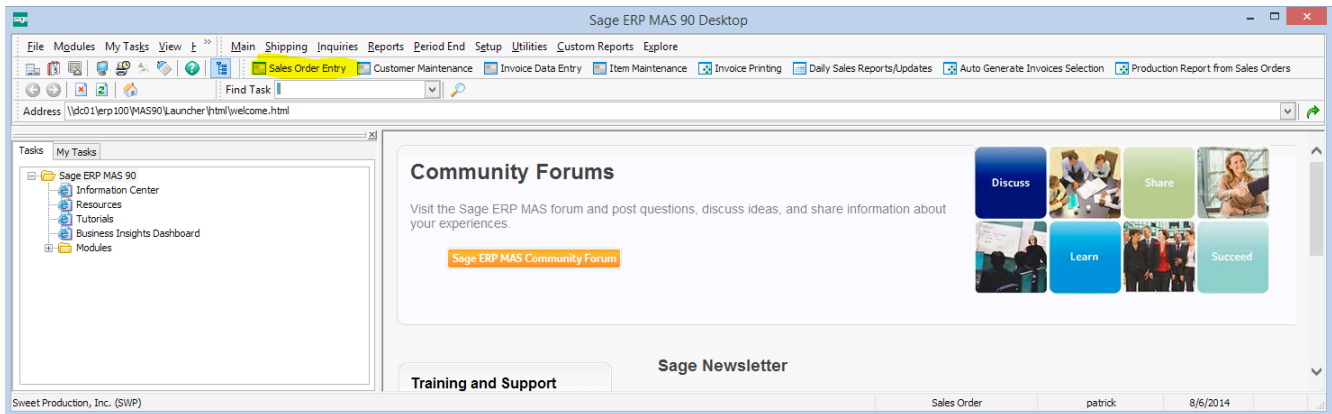


Figure 2.1

**Step Three:** Enter the date for the next day (see Figure 2.2)

**Note:** If today is 8/4/2014, you will enter 8/5/2014.

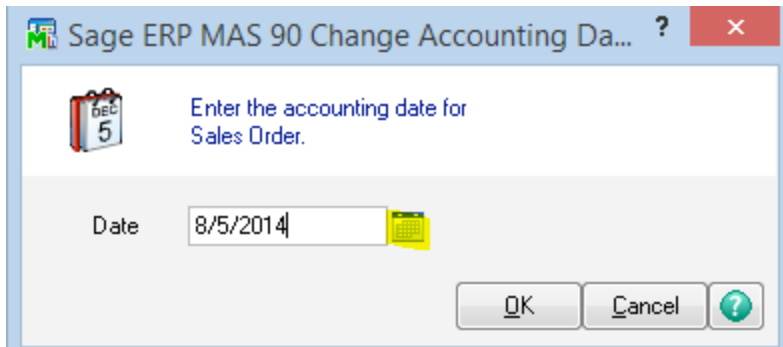


Figure 2.2

**Step Four:** Click the Next Order No. icon next to the magnifying glass (see Figure 2.3)

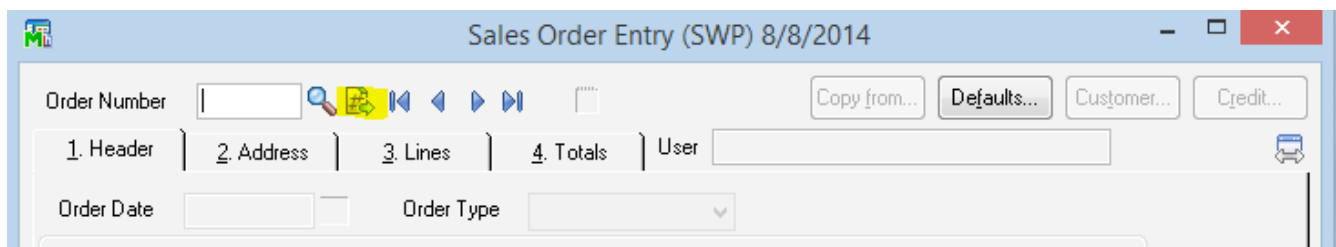


Figure 2.3

[...]



## Training Manual

***Full version of this training manual is available upon request. For information about Sweet Production Inc. or their bread products, visit [www.sweetpinc.com](http://www.sweetpinc.com).***