# Cheat sheet

## I - Transactions

Laddawn's ultimate goal is to transition all of CE's work to the web, but this will have to be done in phases. For release 1, CE will transition from performing all of its work within Avante's CE Request System, to performing the most basic transactions on the new website (sales order, quotes, etc.), and performing the remainder within Avante. The transactions that are moving to the web account for approximately 70% of CE's transactions.

If what you pull from the queue is not one of these transactions, please use the customer/contact #s for a "made-up" transaction of your choice that CAN be done on the website.

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| **Release 1** | |
| **Remaining in Avante** | **Moving to web** |
| * 03X - sample order entry * 040  SALES ORDER CHANGE * 041  EXPEDITE * 046 REVIEW EDI ORDER * 060  POD RECEIPT * 070  STOCK CHECK *advanced* * 075  MRP DISPLAY * 080  PRICE INQUIRY *advanced* * 11X - NS Made and Outside Buy Quotes * 140  PRINT QUOTE *advanced* * 160  INVENTORY LOCATION * 170  CR/DB MEMO ENTRY * 180  CR/DB MEMO CHANGE * 190  RA ENTRY * 200  RA CHANGE * 210  RA INQUIRY * 220  RA ACKNOWLEDGMENT * 230  GENERAL | * 030  SALES ORDER ENTRY - except samples * 070  STOCK CHECK *basic* * 080  PRICE INQUIRY *basic* * 110  CUSTOM QUOTE ENTRY - except NS made/outside buy * 120  CUSTOM QUOTE CHANGE * 130  CONVERT QUOTE – NOW AUTOMATED FOR WEB ORDERS!!! * 043  CHECK ORDER STATUS * 050  PROOF OF DELIVERY * 090  PRINT ACKNOWLEDGMENT * 140  PRINT QUOTE *basic (one at a time)* |

Additional changes

Master users – we will be able to flag certain contacts in Avante as “master users” – this will enable them to work on behalf of any bill to in their sales organization. They will only need a single login, but they can only work on behalf of one bill to at a time - within a single session, they can toggle between bill tos via a special drop down menu.

## II - Reporting issues and feedback

**Please do not contact anyone in IT directly; please funnel all feedback and issues through me.**

1. **If something isn’t working the way you think it should, or doesn’t look quite right to you, please take notes and put them into a an email when you’re done for the day; please include enough detail to recreate what you were doing at the time. This would include:**

* a screen capture – a picture is worth a thousand words, in addition to depicting the problem you’re having, it can convey a lot detail needed to recreate the problem, the specific dimensions, settings, etc. of the item(s) you’re working on, so you don’t have to retype all that
* customer number/contact number if applicable
* approximate time of day (only if there’s a long lag time between experiencing the issue and sending the email, otherwise the email provides enough of a date stamp)
* additional detail if the screen capture doesn’t provide enough detail – for example, something that you see which is fleeting and cannot easily be captured with the snipping tool
* your name somewhere in the subject or body – so I know who sent it

Note – if you wish to report generic observations or feedback like “The Sharing message should make reference to the quote’s expiration date” or  “I hate that I have to tab from field to field and cannot hit return to advance to the next field” then you can omit many of the specifics about exactly what you were doing at the time.

1. **If something is stopping you dead in your tracks – for example, Avante is down, the website is down or exceedingly slow, or the 005 request type is not logging you in to the site as the customer – please call me ASAP. I can be reached as follows:**

* Mondays and Fridays  (telecommuting) – 508-785-0332
* Tues, Weds, Thurs (in Devens if I’m not with you) – 978-563-6148
* Cell, just in case: 781-690-5135
* If you get my voice mail on a day I’m working, please leave a message and shoot an email to ITAS.
* If I am taking a day off,  I will let you know. My backup is Janice Campo.

## III – What’s working and what’s not?

Although most features have been programmed, we are not bug free yet.

I could tell what is or isn't working today - but it could change tomorrow.

**You don't know what you don't know** - I will tell you many of the issues you report are "known" – don’t worry about it. Just err on the side of overreporting for now – but don’t let bug reporting become the focus of your efforts. What we really want to know is how well you will be able to perform your job using the site.

## Initiating transactions

CE will continue to initiate transactions within the CE Request System, by entering a specific bill to customer and contact. However, instead of creating a specific workflow request for each distinct type of transaction (030, 070, etc.), CE will open a single generic request type (005) which will enable them to perform any of the transactions that are available on the web. Once they select the generic request type, Avante will pass that contact's credentials to the website, logging the CE operator into the website as the contact, but with special CE features that only CE can access (for example, ability to override pricing).  If the customer is requesting more than one transaction at a time - for example, a stock sales order and a new quote - CE will be able to initiate this with one request.

## Keeping track of transactions and closing them

Programming behind the scenes will automatically parse some of your work out into separate request types in Avante – stock sales orders, custom quote creation, and quote conversion. You can use the CE workflow popup (access via purple tab that floats on the right side of every page) to:

See automatically created requests and put them on hold/route them

Manually create additional request types (for example, price inquiry) and put them on hold/route them

Procedures are still being developed - it remains to be decided Tina wants CE to keep track of all unique transactions or just those that need special attention (being put on hold, routed), and/or those that you want to make a special note of.

Once you are done with your work (including any workflow items in the CE workflow popup), log out of the website, close the browser, and then F2/save the request.