Salesperson Training

High-Level Design Document

Contents

1. Purpose of this Document

This document summarizes learning solutions that are recommended by the Tyler instructional designers, specific to Company X and for the audiences detailed below.

2. Summary of Training

This training program provides Company X Salespeople with the knowledge and skills required to successfully use Tyler to process sales transactions, inquire on inventory, and close the sales day.

Training outside of the Tyler system (excluding certain Company X policies), is not within the scope of this training program. This instruction will be used in conjunction with materials created by Company X to produce a complete training solution.

Target Audience

The target audience for this training is **Company X Salespeople**:

a. New Employees - employees who are new to Company X.

b. Current Employees - employees who are currently performing in the position and need additional exposure to the subjects or who need remediation.

Overview of Courses

Course Title	Description
Introduction	
1. Introduction to Point of Sale	Provides an overview of the Tyler Point of Sale (POS) application.
2. Tyler Screen Layout	Summarizes the various screens in the POS application.
General Skills	
3. Using the Search Feature	Walkthrough of the types of searches performed in POS Entry.
4. Completing Payment Information	Walkthrough of the payment information screen.
Transaction Processing	
5. Take With (TW) Invoices	A step-by-step tutorial on processing a Take With (TW) sales transaction in Tyler.
6. "Company X" Sale	A step-by-step tutorial describing how sell merchandise to a "Company X" customer.
7. "Company X" Return	A step-by-step tutorial describing how to return merchandise to a "Company X" customer.
8. Exchanging TW Merchandise	A step-by-step tutorial on exchanging merchandise on a TW order in Tyler.
9. Returning TW Merchandise	A step-by-step tutorial on processing a return on a TW transaction in Tyler.
10. Applying Price Protection	A step-by-step tutorial detailing how to apply Price Protection to an item that has already been sold in order to match a competitor's price.
11. Creating a Delayed Delivery (DD) Invoice	A step-by-step tutorial on processing a Delayed Delivery (DD) sales transaction in Tyler.
12. Exchanges on a DD Invoice	A step-by-step tutorial on exchanging merchandise on a DD order in Tyler.
13. Making a Layaway Payment (ML)	A step-by-step tutorial detailing how to process a layaway payment.

14. Refunding a Layaway Payment (ML)	A step-by-step tutorial detailing how to refund a layaway payment.
15. Shipping an Entire Order (DZ)	A step-by-step tutorial on how to ship an entire order (DZ) in Tyler.
16. Shipping a Partial Order (DZ)	A step-by-step tutorial on how to ship a partial order in Tyler.
17. Changing a Delayed Delivery (DI)	A step-by-step tutorial on how to make changes to a DD order in Tyler.
18. Deleting a Line from an Order (DI)	A step-by-step tutorial detailing how to delete a line from an order (DI) in Tyler.
19. Changing the Delivery Date for an Item (DI)	A step-by-step tutorial detailing how to change the delivery date for an item (DI) in Tyler.
20. Changing the Delivery Date for an Order (DI)	A step-by-step tutorial detailing how to change the delivery date for an order (DI) in Tyler.
21. Changing the Delivery Date on a Line (DI)	A step-by-step tutorial detailing how to change the delivery date on a line (DI) in Tyler.
22. Creating a Quote (QT)	A step-by-step tutorial on how to create a quote ticket (QT) in Tyler.
23. Maintaining a Quote (RQ)	A step-by-step tutorial on maintaining a quote ticket (RQ) in Tyler.
24. Accepting a Quote (RQ)	A step-by-step tutorial detailing how to accept a quote (RQ) in Tyler.
25. Inventory Stock Inquiry Screen (03-07)	An overview of the Invoice Stock Inquiry screen in Tyler. This selection is located in the Inventory application, but has relevance for POS.

End of Day Close

26. Introduction to Closing the Sales Day	An introduction to the end of day close process.
27. Completing an End of Day Cashout (02-09)	A step-by-step tutorial describing how to complete and end of day cashout.

28. Running the Audit (02-03)	A step-by-step tutorial describing how to run the sales audit.
29. Running Sales Transactions Update (02-05)	A step-by-step tutorial describing how to update the sales day.

NOTE: Additional courses may be added as needed.

Other Training Resources

- Transaction job aids/quick references will be located at each Tyler workstation
- Coaching and feedback provided by training staff and management

Audience Analysis

For the purposes of this instructional plan, the target audiences for this training will be limited to the following roles:

- **Company X Salespeople**

  o This position consists of those employees who will use the Tyler software to perform daily tasks related to the operation of a Company X branch.

The instructional designer assumes the following about the targeted audiences:

- Participants have knowledge of the products they are selling.

- Participants have basic computer operation skills.

- Participants have access to the training materials after the initial training period.

- A manager will ensure the completion of all Tyler training material prior to operation of the software.

- The participants will receive coaching, and will be given feedback to reinforce the training once it has been completed

Task and Gap Analysis

The current state of training for Tyler at Company X is as follows:

- Salespeople spend one day training to use the Tyler system.

- New salespeople periodically participate in "buddy training" with experienced Salespeople.

- Salespeople have access to a Tyler workbook with documentation and activities.

- Salespeople have access to docs.tylernet.com (Tyler Support Center) for basic instructions on using Tyler.

The following task areas and behaviors are addressed within this training:

Competency Areas	Associated Tasks	Current State/Gaps
Return Process	Use the Enhanced Return Process to track returned items.	Currently, salespeople process returns by entering negative quantities on a TW transaction, rather than using the Enhanced Return Process (clicking the Return button).
Quote Tickets	Use the Quote Ticket (QT) Transaction type to create, maintain, and complete quote tickets.	Currently, salespeople are able to create quote tickets, but do not use the 'Accept Quote' option to turn them into DD transactions.
Applying a Negative ML	Use the ML transaction type to refund a Middle Layaway payment to a customer.	Currently, salespeople are processing refunds to customers when there is no balance owed. They need to use Order Maintenance to analyze the order before refunding ML payments.

Competency Areas	Associated Tasks	Current State/Gaps
"Company X" Sales and Returns	Will provide more information	
Other Sales and Returns	Will provide more information	

3. Learning Goals and Scope of Learning

By completion of the training, participants will be able to achieve the following goals:

1. Complete sales transactions quickly, accurately, and with a high level of customer service, using:

    - knowledge of the Tyler system obtained from this training program and experienced salespeople

    - job aids and other provided learning resources

    - coaching and feedback from managers

The training is limited in scope to the Salesperson position and the groups identified as the target audience.

Course Details and Goals

Module Name	Main Ideas and Goals	Delivery Methods and Resources
Introduction		
1. Introduction to Point of Sale	Overview of the Tyler Point of Sale system.	- Video-based tutorial hosted on doc.tylernet.com - Job Aids for transaction types
2. Tyler Screen Layout	Summary of the screen layouts in the Tyler system. **GOAL:** Locate and describe each tab on the POS screens	- Video-based tutorial hosted on docs.tylernet.com - Job Aids for transaction screens

General Skills

3.	Using the Search Feature	Walkthrough of the types of searches performed in different selections: • A/R Account Number Search • Customer Search (and Maintenance) • Order Number Search • "Company X" Search • Item Search **GOAL:** Demonstrate ability to use the various search features on the POS screen.	• Video-based tutorial hosted on docs.tylernet.com • Job Aids for transaction screens
4.	Completing Payment Information	Walkthrough of the payment information screen. **GOAL:** Demonstrate ability to process various payment types.	• Video-based tutorial hosted on docs.tylernet.com • Job Aids for transaction screens

Transaction Processing

5.	Take With (TW) Invoices	Overview and step-by-step tutorial on processing a Take With (TW) sales transaction in Tyler. Used when a customer would is making a purchase and taking items with them immediately. **GOAL:** Demonstrate ability to perform a TW transaction.	• Video-based tutorial hosted on docs.tylernet.com • Job Aids for transaction screens
6.	"Company X" Sale	Overview and step-by-step tutorial on processing a sale for a "Company X" customer. Includes instructions for looking up a "Company X" number, adding it to a customer record, and redeeming a "Company X" gift certificate. **GOAL:** Demonstrate ability to process a sale for a "Company X" customer.	• Video-based tutorial hosted on docs.tylernet.com • Job Aids for transaction screens

7.	"Company X" Return	Overview and step-by-step tutorial on processing a return for a "Company X" customer. **GOAL:** Demonstrate ability to process a return for a "Company X" customer.	• Video-based tutorial hosted on docs.tylernet.com • Job Aids for transaction screens
8.	Exchanging TW Merchandise	Overview of and step-by-step tutorial on exchanging merchandise on a TW order in Tyler. Used when a customer would like to exchange an item previously purchased and taken home. **GOAL:** Demonstrate ability to perform a TW merchandise exchange.	• Video-based tutorial hosted on docs.tylernet.com • Job Aids for transaction screens
9.	Returning TW Merchandise	Overview and step-by-step tutorial on processing a return on a TW transaction in Tyler. Used when a customer would like to return an item previously purchased and taken home. **GOAL:** Demonstrate ability to perform a TW merchandise return.	• Video-based tutorial hosted on docs.tylernet.com • Job Aids for transaction screens
10.	Applying Price Protection	Overview and step-by-step tutorial detailing how to apply Price Protection to an item that has already been sold in order to match a competitor's price. Used when a customer would like to receive a competitor's price on an item that has already been purchased. **GOAL:** Complete a Price Protection adjustment on a previously sold item.	• Video-based tutorial hosted on docs.tylernet.com • Job Aids for transaction screens

11. Creating a Delayed Delivery (DD) Invoice	Overview and step-by-step tutorial on processing a Delayed Delivery (DD) sales transaction in Tyler. Used when a customer is purchasing items that will be delivered. Included are scenarios where items on the transaction have different tax rates, depending on where they are being picked up/delivered. A discussion of tax exempt customers will also be covered. **GOAL:** Demonstrate ability to complete a DD invoice.	• Video-based tutorial hosted on docs.tylernet.com • Job Aids for transaction screens
12. Exchanges on a DD Invoice	Overview and step-by-step tutorial on exchanging merchandise on a DD order in Tyler. Used when a customer would like to exchange merchandise that has been delivered **GOAL:** Demonstrate ability to perform a DD merchandise exchange.	• Video-based tutorial hosted on docs.tylernet.com • Job Aids for transaction screens
13. Making a Layaway Payment (ML)	Overview and step-by-step tutorial detailing how to process a layaway payment. Used when a customer would like to make a payment on an item in layaway. **GOAL:** Demonstrate ability to process a layaway payment.	• Video-based tutorial hosted on docs.tylernet.com • Job Aids for transaction screens
14. Refunding a Layaway Payment (ML)	Overview and step-by-step tutorial showing how to process a layaway refund. Used when a salesperson needs to refund a layaway payment made toward on order. **GOAL:** Demonstrate ability to process a refund of a layaway payment, while using Order Maintenance to verify the account.	• Video-based tutorial hosted on docs.tylernet.com • Job Aids for transaction screens

15. Shipping an Entire Order (DZ)	Overview and step-by-step tutorial on how to ship an entire order in Tyler. Used when a customer needs an entire order shipped. **GOAL:** Demonstrate ability to ship an order in its entirety.	• Video-based tutorial hosted on docs.tylernet.com • Job Aids for transaction screens
16. Shipping a Partial Order (DZ)	Overview and step-by-step tutorial on how to ship a partial order in Tyler. Used to ship only part of an order (some items are backordered). **GOAL:** Demonstrate ability to ship a partial order.	• Video-based tutorial hosted on docs.tylernet.com • Job Aids for transaction screens
17. Changing a Delayed Delivery (DI)	Overview and step-by-step tutorial on how to make changes (including adding new items) to a DD order in Tyler. **GOAL:** Demonstrate ability to perform maintenance on a DD order.	• Video-based tutorial hosted on docs.tylernet.com • Job Aids for transaction screens
18. Deleting a Line from an Order (DI)	Overview and step-by-step tutorial detailing how to delete a line from an order in Tyler. **GOAL:** Demonstrate ability to delete a line from an order in Order Maintenance.	• Video-based tutorial hosted on docs.tylernet.com • Job Aids for transaction screens
19. Changing the Delivery Date for an Item (DI)	Overview and step-by-step tutorial detailing how to change the delivery date for an item in Tyler. **GOAL:** Demonstrate ability to change the delivery date for an item.	• Video-based tutorial hosted on docs.tylernet.com • Job Aids for transaction screens
20. Changing the Delivery Date for an Order (DI)	Overview and step-by-step tutorial detailing how to change the delivery date for an entire order in Tyler. **GOAL:** Demonstrate ability to change the delivery date for an entire order.	• Video-based tutorial hosted on docs.tylernet.com • Job Aids for transaction screens

21. Changing the Delivery Date on a Line (DI)	Overview and step-by-step tutorial detailing how to change the delivery date on a line in Tyler. **GOAL:** Demonstrate ability to change the delivery date for a line.	• Video-based tutorial hosted on docs.tylernet.com • Job Aids for transaction screens
22. Creating a Quote (QT)	Overview and step-by-step tutorial on how to create a quote transaction in Tyler. Used when a customer would like to know the price of an item without adding the item to an order. **GOAL:** Demonstrate ability to create a quote ticket.	• Video-based tutorial hosted on docs.tylernet.com • Job Aids for transaction screens
23. Maintaining a Quote (RQ)	Overview and step-by-step tutorial on maintaining a quote (RQ) in Tyler. Used when a customer's quote ticket needs to be changed. **GOAL:** Demonstrate ability to make changes to a quote ticket.	• Video-based tutorial hosted on docs.tylernet.com • Job Aids for transaction screens
24. Accepting a Quote (RQ)	Overview and step-by-step tutorial detailing how to accept a quote transaction (RQ) in Tyler. Used when a customer decides purchase the item(s) on a quote transaction. This process turns the quote transaction into a DD transaction. **GOAL:** Complete the quote ticket process.	• Video-based tutorial hosted on docs.tylernet.com • Job Aids for transaction screens
25. Inventory Stock Inquiry Screen	An overview of the Invoice Stock Inquiry screen in Tyler. This selection is located in the Inventory application, but has relevance for POS. **GOALS:** • Describe the fields and their purposes. • Demonstrate ability to perform an inventory stock inquiry.	• Video-based tutorial hosted on docs.tylernet.com • Job Aids for transaction screens

End of Day Close

26. Introduction to Closing the Sales Day	An introduction to the end of day close process. **GOAL:** Describe the end of day close process.	• Video-based tutorial hosted on docs.tylernet.com • Various job aids
27. Completing an End of Day Cashout (02-09)	An overview and step-by-step tutorial describing how to complete and end of day cashout. **GOAL:** Complete the end of day cashout process.	• Video-based tutorial hosted on docs.tylernet.com • Various job aids
28. Running the Audit (02-03)	An overview and step-by-step tutorial describing how to run the sales audit. **GOAL:** Demonstrate ability to print the sales audit.	• Video-based tutorial hosted on docs.tylernet.com • Various job aids
29. Running Sales Transactions Update (02-05)	An overview and step-by-step tutorial describing how to update the sales day. **GOAL:** Demonstrate ability to run the sales update.	• Video-based tutorial hosted on docs.tylernet.com • Various job aids

Other Possible Courses

- Selling Accessories
- Selling Warranty
- Creating a Package
- Selling a PKS Package
- Canceling an Order
- Accepting a Trade In
- Applying an Instant Rebate
- Gift Certificates
- Returning an Item to a Supplier

QUESTION: Where do employees learn Company X's sales policies? Will employees benefit from these policies being included in the training material, and if so, where can we find them?

4. Assessment and Evaluation Strategies

The goals and performance objectives described in this instructional plan will be measured and evaluated using the following methods and strategies:

Assessments

1. **Learning Activities** will be offered and required following completion each course to capture retention and comprehension of the topics. These activities will review and refresh the learning objectives.
2. **Summative Skills Assessment (Final Test)** will be delivered at the completion of the training program to capture overall retention and performance of all the course objectives. It will cover material from each module and will be reviewed to produce a percentage score. All salespeople must complete this assessment before processing live sales transactions on the system.

Evaluations

The instructional designer will include the following:

- One or more Level 1 surveys to evaluate the training, materials, and logistics.
- Further evaluations (Levels 2-4) will be determined as the training course is developed.