

DETAILED TRAINING FOR CLIENT SERVICES

EMPLOYEE:			
	DATE	INSTRUCTOR	EMPLOYEE
TASK	COMPLETED	SIGNATURE	SIGNATURE
Opening Job Tickets			
From estimate			
How to fill out preflight form			
Copying old job or estimate			
Reserving Paper			
Quick job entry			
Rework ticket			
In-kind tickets			
R&D jobs			
Finished goods (BAU) ticket – mult inventory tab			
From scratch – no estimate (Prep or Kitting ticket only)			
Launching a job into production			
Making changes to an Estimate or Ticket			
How to change qty			
How to change ink colors			
How to change size			
How to change / add prep or Bindery Cost center codes			
How to add / copy / delete a component			
- Templates – how they work			
- Multit-runs			
- Lots			
- Gang runs			
Prep / Mailing approvals (BP, STP & Cross Plant)			
Prep approval / edit procedure			
DP approval / edit procedure			
Laser / ink jet signoff approval / edit procedure			
Rework			
When & how to fill out a rework form			
Letterhop			
DP / Mailing Terms			
Scripts – review / explain			
Drops / Packages			
How to figure thickness and weight			
Getting a postage invoice created			
Insert Samples			
Track- N-Trace			
PO request for On-Trac – when and how			
Outside services – who needs what			
Inventory			
How to create a form number – Customer Owned			
How to create a form number – Finished Goods (BAU)			
Reports – basic inventory, location, audit			
Inventory issue – single or multi			
Inventory Issue – Ship to Client or recycle			

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Shipping			
How to add and address to shipping library			
How to search for an address			
How to ship a small package out (proofs / samples)			
How to request a pick-up			
How to find a tracking number / tracking report			
Billing			
How to process billing			
How to run a job cost report			
How to do a pre-invoice			
Miscellaneous			
Job Activity report			
Switching Plants and why			
Adding a Plant to job			
Due Dates and what they mean			
Review J Drive			
Review K Drive			