Example: Business Integration Job Aid

This job aid was created after assisting one client with identifying knowledge gaps and training needed in support of several business integrations. After six years, the client business and system community still refer to this job aid and when a new integration occurs, frequently asks for copies of it from Training Partners Plus, Inc. archives. We have also been called upon by this client to create other similar job aids for other processes.

Business Integration Job Aid
Everything you need to know to bring a new business onto OM.

INPUT	→	PROCESS	→	OUTPUT

Environment Impacts	Order Capture	Order Processing	Order Shipment	Order Invoicing	Order Follow-up	Reporting
• CSC Org.	• Product Info	• Order Receipt	• Sourcing	• Prelimin	• Returns	• CSC
• ACSC	• Price Lists	• Lead Times	• ASL/DPS	• KF Invoice	• Over/Short	• Billing
• CFSC	• Terms	• Emergency	• MS/ML	• Payments	• Unsalable	• Sales
• Credit	• Price Policy	• Min/Max	• Pallets	• Lock Boxes	• Claims	• Finance
• Sales Org.	• Bid Policy	• Tier Round	• Pickup	• Billing	• Rebates	• System Links
• Bus Overview	• Contract Policy	• Allocations	• System	• RAO/PP	• DPA	
• Divestiture	• Deals	• Substitutions	Links		• Deductions	
• Policy	• New Accounts	• CutFile/Backorders			• Collections	
• System Links	• Geog Mapping	• Samples				
	• System Links	• Distress/Alert				
		• Credit Holds				