

## WORK INSTRUCTION

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**DOC NUMBER:** D0054080

**REVISION:** A

**OWNER:** Customer Service

**REV. DATE:** 12/07/2016

CUSTOMER SERVICE DOCUMENTATION STORAGE

### TRIGGER EVENT:

This work instruction shall be followed whenever applicable customer-related documents are to be stored within OnBase.

### PURPOSE:

To define the storage of documents within the sales department

### PROCESS:

Quote to Cash

### PROCESS STEP(s):

Quote, Order

### REFERENCE:

- ISO 9001 Quality Management Systems - Requirements
- D0059944 Quote
- D0030848 Customer Orders

### APPLICABILITY:

### RESPONSIBILITY and ACCOUNTABILITY:

1. The individuals in the Sales Department who receive the documentation are responsible for attaching it into OnBase
2. The Inside Sales and Customer Service staff shall be responsible for:
  - a. Determining where to attach the documentation
  - b. Attach to appropriate folder thru outlook or uploading directly into OnBase

### DEFINITIONS:

1. Hyland Unity Client OnBase Storage folders
  - a. Correspondence
  - b. Credit Card Ticket
  - c. Estimates
  - d. Incidents
  - e. Customer PO
  - f. Price Deviations

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### CUSTOMER SERVICE DOCUMENTATION STORAGE

- g. Transfer order
- 2. Hyland Unity Client OnBase Document Types
  - a. Correspondence
  - b. Credit Card Ticket
  - c. Customer PO
  - d. Dom Bill of Lading
  - e. Estimates
  - f. Export Documents
  - g. Choose appropriate "Export Type" from dropdown menu
  - h. Incidents
  - i. Inspection Report
  - j. Invoices
  - k. Lease Agreement
  - l. Order Verification
  - m. Packing Slip
  - n. Pick List
  - o. Price Deviation
  - p. RMA Tag
  - q. Transfer Order
  - r. Transfer Order Pick List

#### PROCEDURE:

1. For documents that come thru via email, they are uploaded into OnBase via Outlook folders.
2. For documents that come thru fax or hard copy, they can be uploaded via scanner or by going into OnBase and choosing the upload button and browse for any document saved to a folder or desktop.
3. Pick lists are uploaded via the Marketing Printer directly into OnBase.
  - a. Bar codes at the bottom of the pick lists are read and attached to appropriate order
  - b. After uploading, check batch to make sure all were attached
  - c. If any did not, manually upload them
4. Retrieval of documents
  - a. For orders and estimates, go to that order number or estimate and hit the F3 button
  - b. All items attached to that order or estimate will come up
  - c. For other document types, go into Hyland Unity Client and hit on retrieval and choose document type you need to retrieve

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CUSTOMER SERVICE DOCUMENTATION STORAGE

REVISION	DATE	DESCRIPTION OF CHANGE
-	04/27/2015	Initial release
A	12/07/2016	Cosmetic / Formatting Changes