# AICPA Service Center Training Guide

American Institute of Certified Public Accountants (AICPA)

# AICPA SERVICE CENTER TRAINING GUIDE

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# INTRODUCTION

Welcome to the training session of the AICPA Service Center Application referred to as Customer Relationship Management (CRM).

CRM is one of the business solutions being implemented by the MSP Team which is a collaborative effort between the AICPA and the State Societies through the Shared Services, LLC joint venture.

CRM is more than just a technology; it is a comprehensive strategy approach which provides seamless integration of every area of business that relates to members or customers. CRM's goal is an economical, faster and better customer service to leverage and profit from each and every customer relationship.

The CRM applications or modules are as follows:

- ✓ Oracle Sales Online - a web-based application that allows you to create and manage customer information, business opportunities and quotes.
- ✓ Order Management - a form-based application that enables you to process and manage from creation existing product orders and returns.
- ✓ Email Management - an application that provides a complete solution for managing e-mail interactions with customers, employees, and other entities that interact with an organization.
- ✓ Service Contract Manager - an application that will be used to manage subscription-based products which include periodicals and online content.
- ✓ Oracle Training Administration - helps you schedule and manage your training events, such as courses and seminars.
- ✓ Trading Community Manager - a program that performs merging duplicate records.
- ✓ XXMSP Interface User - a program that automates the process of scanning document, uploading prospect files and third party ship confirms.

The CRM training will last for six days.

This training guide is accompanied by a Student Guide - AICPA Service Center Applications that provides step-by-step instructions.

# CUSTOMER RELATIONSHIP MANAGEMENT (CRM) OVERVIEW

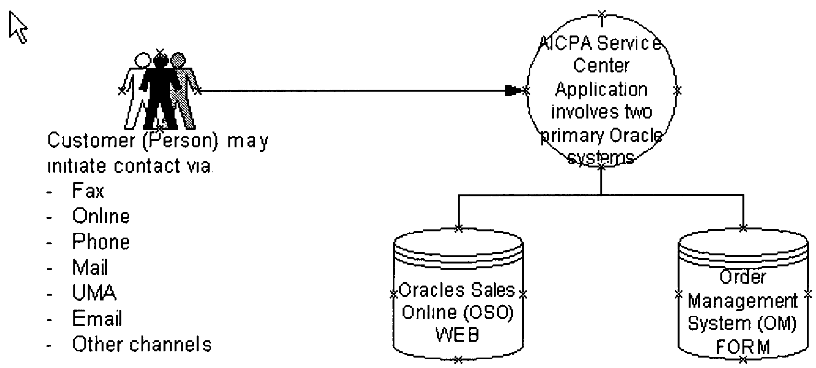
Customer Relationship Management (CRM) involves all interactions an organization has with customers or members, including sales and service, marketing, and communications related activities. The overall objective of our CRM effort is to develop better relationships with each of our members and customers by identifying, measuring and consolidating the view of all interactions we have with them. To help facilitate communication with our members, this "360-degree view" of all profile, marketing, and service and order information will reside in one system versus dozens in the current environment. This means we will be able to track every transaction associated with a member, including products purchased, conferences attended, and other special interests. Armed with this invaluable information, we can become more member-centric and personalize how we communicate, sell and serve each unique member.

The CRM module includes a complete set of business applications that will enable us to manage marketing campaigns, efficiently manage customer interactions, manufacture products, ship orders, collect payments, and much more. As an example, CRM enables us to develop marketing campaigns based on past purchase patterns (similar to the Amazon technique of highlighting other items customers are buying that the targeted consumer may be interested in). In addition to identifying possible product combinations to offer, with CRM we will better understand what events have an impact on a member's decision to renew membership. CRM allows us to capture a greater amount of each individual members business interests so that we can more precisely identify the content matter that they would be most interested in.

The concept of "one voice" will be attainable through CRM since our customer service agents will have access to various levels of information, currently unavailable, on member contact. For example, a customer service representative will be able to view member information, from AICPA mailings they have been sent, to telephone calls made to or received by the member, and who they spoke with and the resolutions to their inquiries. Products, services, membership and specific marketing information will provide real-time communications history available through the CRM solution. The result is a transformation of the service center's current capability, into a full, relationship-building, service center operation.

## AICPA Service Center Applications - CRM

## AICPA Oracles Sales Online




**AICPA's Oracle Sales Online** (OSO) is a Web-based application for creating, updating and maintaining data relating to

- Application Processing
- Customer Record Maintenance
- Sales (all products and payment types)
- Proformas
- Event Registration
- CPE Tracking
- Customer Issue Management
- Work Task Management
- Interdepartmental Task Hand-Off
- Email Management
- Knowledge Base
- E-Collateral Fulfillment
- 360 Degree View of Customer Interaction
- Standard Reports

A total of **6 Tabs** are displayed below the header region of the Order Sales Online. Each Tab opens the corresponding page where you can perform a function or view data.

Click a **Tab** to open the page. For example, the Quote tab opens the Quote page where all the quotes and orders that have been generated for the selected party type are listed. You can double click a quote or order to view its details.

**For More Information, Please Review the Diagram and Descriptions Below.**

| PERSONS | ORGANIZATIONS | QUOTE | COLLATERAL | HOME | CALENDAR |
|---|---|---|---|---|---|
| Store customer information<br><br>- All Individual Customers (members and non-members)<br>- Authors<br>- Students<br>- Customers<br>- Speakers<br>- AICPA staff<br>- Elected officials<br>- Other | Manage transactions with outside firms (public and non-public accounting)<br><br>- Employers<br>- Universities<br>- Bookstores<br>- Government Agencies<br>- State Societies<br>- State Boards<br>- Associations<br>- Vendors<br>- Committees<br>- AICPA<br>- Sections<br>- Accreditations<br>- Other | Create and view sale preorders | Create E-documents for distribution to customer via email<br><br>**Electronic collateral consists of an email or fax cover letter and the electronic files of the collateral itself.** | Read team news<br><br>Manage tasks.<br><br>Gain quick access to tasks assigned to you.<br><br>Change the priority, status, and due date of your tasks. | Define and view available and non-available times for a resource or group of resources<br><br>Manage calendar for yourself or another resource<br><br>**There are two types of calendar windows: Calendar Set up and Calendar Datebook.** |

## Person Tab

This tab helps you view and enter a person or contact. A person or contact can be directly related to an organization or separate from an organization. It can also be used to specify contact restrictions and methods.

## Organization Tab

This tab helps you enter and view profile information and contact points. An organization can vary in terms of business function.

## Quote Tab

This tab helps you view, create, and update quotes and orders.

## Collateral Tab

This tab helps you fulfill collateral requests and manage collateral fulfillment activities.

## AICPA Order Management

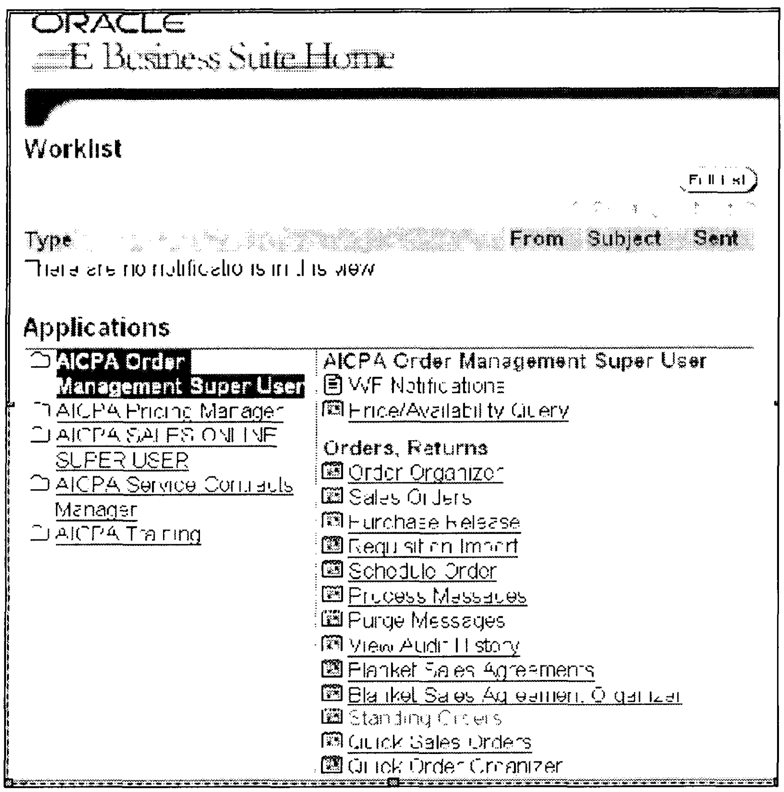
**AICPA's Order Management Super User (OM)** is a Form-based application for creating, updating and maintaining data relating to
- Refunds
- Adjustments
- Tracking Shipments
- Subscriptions
- Service Contracts
- Credits
- Standing Orders

**Accounts Receivable** (Forms)
- Adjustments Invoice
- Invoice

**OTA - Oracle Training Administration** (Forms)
- Trasferring Registrations

**Discoverer**
- Reporting

**Universal Membership Application (UMA)**
- On-Line Application
- On-Line Profile Updates



# TRAINING SESSIONS

## DAY 1 SALES ORDER

This session will cover the sales process from lead creation to order generation; to manage and track the customer sales cycle and capitalize on up-selling and cross-selling opportunities.

Refer to the instructions below to perform and complete the Sales Order process.

*Instructions:*

- Logging on and Off to Oracle Applications - NAV3005C
- Launching/Switching Responsibilities - NAV3010C
- Using the Navigator Windows - NAV3015C
- Changing Password - NAV3020C
- Using Quick Find - NAV3025C
- Using Advanced Search - NAV3030C
- Using Personalized Search - NAV3035C
- Person Overview - NAV3040C
- Creating a Person - NAV3045C
- Adding/Updating Person's Address - NAV3055C
- Updating Person's Phone/Email Address - NAV3060C
- Overview - Organization - NAV3085C
- Creating a New Organization - NAV3090C
- Adding an Organization Address/Branch - NAV3095C
- Updating Organization Address/Branch - NAV3100C
- Creating a Person to Organization Relationship - NAV3110C
- Setting Dues Primary Flag - NAV3145C
- Creating a Quote Header - NAV3150C
- Adding Products to a Quote - NAV3155C
- Adding Events to a Quote - NAV3160C
- Overriding the Selling Price - NAV3170C
- Entering Drop Shipment Locations - NAV3175C
- Entering Shipping Details - NAV3176C
- Entering Pricing Details - NAV3180C
- Placing a Quote as an Order - NAV3185C
- Completing an Event Registration - NAV3190C
- Searching for a Quote - NAV3195C
- Copying a Quote - NAV3200C

Refer to the Appendix section for the following Reference Grids, which are useful for this session.

- Order Status Summary
- Discount Pricing Overview
- Task Values Summary

**Sales Order Exercises**

1. Get sample orders from facilitator
2. Create customer records
3. Identify order types
4. Enter orders
5. Record quote/order number and order type on each order
6. Initial and date each order
7. Hand in to facilitator

## DAY 2 SALES SERVICE

This session will cover the processes for product returns, adjustments, refunds and payments.

Refer to the instructions below to perform and complete the Sales Service process.

### *Instructions:*

- Customer Relationship - NAV3000C
- Logging On and Off to Oracle Applications - NAV3005C
- Launching/Switching Responsibilities - NAV3010C
- Using the Navigator Window - NAV3015C
- Changing Password - NAV3020C
- Using Quick Find - NAV3025C
- Using Advanced Search - NAV3030C
- Using Personalized Search - NAV3035C
- Searching for a Quote - NAV3195C
- Assigning Work Tasks - NAV3215C
- Receiving and Updating a Work Task - NAV3220C
- Getting a Message - NAV3225C
- Composing a Message - NAV3230C
- Creating a Template - Knowledge Base - NAV3235C
- Overview - Order Management - NAV3240C
- Editing an Order In OM - NAV3245C
- Canceling an Order in OM - NAV3250C
- Canceling a Line of an Order in OM - NAV3255C
- Returning/Refunding an Order in OM - NAV3260C
- Checking Refund Status in OM - NAV3261C
- Updating a Standing Order - NAV3270C
- Canceling a Standing Order - NAV3275C
- Accounts Receivable Overview - NAV3285C
- Checking Refund Status in AR - NAV3290C
- Adjusting an Order - NAV3295C
- Editing Invoice Payment Details - NAV3300C
- Confirming a Credit Balance - NAV3305C
- Printing an Invoice - NAV3315C
- Updating a Service Contract - NAV3320C
- Refunding a Subscription in Service Contracts - NAV3325C
- Transferring a Registration in OTA - NAV3330C

Refer to the Appendix section for the following Reference Grids which are useful for this session.

- Order Status Summary
- Discount Pricing Overview
- Bill Code Mapping
- Task Values Summary

**Sales Service Exercises**

1. Get sample orders from facilitator.
2. Respond to service request written on order.
3. Record new order numbers, transaction/invoice numbers, RMA numbers, adjustment numbers, task numbers on each order.
4. Initial and date each order when complete.
5. Hand in to facilitator.

## DAY 3 GENERAL SERVICE

This session will cover the processes on responding to address update, employment status changes, and membership status changes.

Refer to the instructions below to perform and complete the General Service process.

### *Instructions:*

- CRM Overview - NAV3000C
- Logging On and Off to Oracle Applications - NAV3005C
- Launching/Switching Responsibilities -NAV3010C
- Using Navigation Window - NAV3015C
- Changing Password - NAV3020C
- Using Quick Find - NAV3025C
- Using Advanced Search - NAV3030C
- Using Personalized Search - NAV3035C
- Person Overview - NAV3040C
- Creating a Person - NAV3045C
- Updating Person Type/Status/Status Reason - NAV3050C
- Adding/Updating Person's Address - NAV3055C
- Updating Person's Phone/Fax/Email Address - NAV3060C
- Adding a CPA Certificate License - NAV3065C
- Updating a Person's Profile - NAV3075C
- Using the CPE Tracker - NAV3080C
- Creating a New Organization - NAV3090C
- Adding an Organization Address/Branch - NAV3095C
- Updating Organization Address/Branch - NAV3100C
- Relationships Overview - NAV3105C
- Creating a Person to Organization Relationship - NAV3110C
- Setting Peer Review Primary Flag - NAV3115C
- Setting Dues Primary Flag - NAV3120C
- Editing Relationship Start/End Dates - NAV3135C
- Updating a Relationship - NAV3140C
- Sending Collateral - NAV3205C
- Assigning a Work Task - NAV3215C
- Receiving/Updating a Work Task - NAV3220C
- Getting a Message - NAV3225C
- Composing a Message - NAV3230C
- Creating a Template – Knowledge Base - NAV3235C

Refer to the Appendix section for the following Reference Grids which are useful for this session.

- Person Status Summary
- Peer Review Data Flow
- Task Values Summary
- Legacy Data Conversion Mapping Grid

**General Service - Practice Exercises**

1. Get sample service requests from facilitator.
2. Respond to service request.
3. Record universal IDs, actions and all related task IDs on each service request.
4. Initial and date.
5. Hand in to facilitator.

## Day 4 - 5 Application Process

This session will cover the functionality of entering and validating applications.

- CRM Overview - NAV3000C
- Logging On and Off to Oracle Applications - NAV3005C
- Launching/Switching Responsibilities - NAV3010C
- Using Navigation Window - NAV3015C
- Changing Password - NAV3020C
- Using Quick Find - NAV3025C
- Using Advanced Search - NAV3030C
- Using Personalized Search - NAV3035C
- Person Overview - NAV3040C
- Creating a Person - NAV3045C
- Updating Person Type/Status/Status Reason - NAV3050C
- Adding/Updating Person's Address - NAV3055C
- Updating Person's Phone/Fax/Email Address - NAV3060C
- Adding a CPA Certificate License - NAV3065C
- Updating a Person's Profile - NAV3075C
- Organization Overview - NAV3085C
- Creating a New Organization - NAV3090C
- Adding an Organization Address/Branch - NAV3095C
- Updating Organization Address/Branch - NAV3100C
- Relationships Overview - NAV3105C
- Creating a Person to Organization Relationship - NAV3110C
- Setting Peer Review Primary Flag - NAV3115C
- Setting Dues Primary Flag - NAV3120C
- Quote Overview - NAV3145C
- Creating a Quote - NAV3150C
- Adding Products to a Quote - NAV3155C
- Adding Events to a Quote - NAV3160C
- Overriding the Selling Price - NAV3165C
- Entering Drop Shipments Locations - NAV3170C
- Entering Shipping Details - NAV3175C
- Entering Pricing Detail - NAV3180C
- Placing a Quote as an Order - NAV3185C
- Task Management Overview - NAV3210C
- Assigning a Work Task - NAV3215C
- Receiving/Updating a Work Task - NAV3220C
- Scanning Documents - NAV3340C
- Completing UMA - NAV3355C
- Running Oracle Reports - NAV3360C

Refer to the Appendix Section for the following Reference Grids which are useful for this session.

- Person Status Summary
- Bill Code Mapping
- Task Values Summary
- Legacy Data Conversion Mapping Grid

## Application Process Exercises

1. Get sample applications from facilitator.
2. Manually enter each application.
3. Place quote for initial dues.
4. Create appropriate follow-up tasks
5. Record universal IDs, quote/order number and all related task numbers on each application
6. Initial and date each application.
7. Hand in to facilitator.

## Day 5 - 6 General Process

This session will cover the process of scanning documents, entering prospect files , uploading third party ships confirmation and handling batch of addresses coming from cpa2biz.

***Instructions:***

- CRM Overview - NAV3000C
- Logging On and Off to Oracle Applications - NAV3005C
- Launching/Switching Responsibilities - NAV3010C
- Using Navigation Window - NAV3015C
- Changing Password - NAV3020C
- Using Quick Find - NAV3025C
- Using Advanced Search - NAV3030C
- Using Personalized Search - NAV3035C
- Person Overview - NAV3040C
- Creating a Person - NAV3045C
- Updating Person Type/Status/Status Reason - NAV3050C
- Adding/Updating Person's Address - NAV3055C
- Updating Person's Phone/Fax/Email Address - NAV3060C
- Creating a Person to Person Relationship - NAV3125C
- Creating an Organization to Organization Relationship - NAV3130C
- Editing Relationship Start/End Dates - NAV3135C
- Updating a Relationship - NAV3140C
- Quote Overview - NAV3145C
- Creating a Quote - NAV3150C
- Adding Events to a Quote - NAV3160C
- Creating a Standing Order - NAV3265C
- Updating a Standing Order - NAV3270C
- Canceling a Standing Order - NAV3275C
- Releasing a Standing Order - NAV3280C
- Approving Adjustments - NAV3310C
- Merging Records - NAV3335C
- Scanning Documents - NAV3340C
- Uploading Prospect Files - NAV3345C
- Uploading Third Party Ship Confirms - NAV3350C
- Completing UMA - NAV3355C
- Running Oracle Reports - NAV3360C

Refer to the Appendix section for the following Reference Grids which are useful for this session.

- Person Status Summary
- Task Values Summary

**General Process Exercises**

1. Get sample batch from facilitator.
2. Open/update related task.
3. Complete assigned batch.
4. Close related task.
5. Record actions and all related task IDs on batch.
6. Initial and date.
7. Hand in to facilitator.