



# Managing a Rep's Open Orders

This is a step-by-step guide that will walk CRR's through managing a rep's open order report. This will walk through the expectation of what should be covered before, during, and after meetings with reps.

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## [About Open Order Meetings](#)

Every CRR will set up Teams meetings with your reps. The purpose of these meetings is to review the Open Order Report the day prior to the meeting to discuss any orders the CRR, or the Rep may have questions on. Walk through statuses of orders you find important and what you have done to get the order moving.

- This meeting could also be a time for reps to come with orders they would like an update on. If you did not work the order in question, walk through it with them. Meetings should be 30-60 minutes long.
- Once the report has been reviewed, by both the CRR and Sales Rep, email the report to your CRR manager with any questions or concerns. If there are any orders you feel are not moving due to a system error, please make sure to call those out in the body of the email to be sure they are addressed.

Need help on how to setup a recurring meeting in Teams → <https://help.game-one.com/how-to-create-a-recurring-meeting-in-outlook>

## [Preparing for the Open Orders Meeting](#)

The day prior to your meeting you will want to prepare the following:

1. Download the Rep's Open Order Report to Excel. (Learn how on the [Downloading and Sorting Open Orders SOP](#).)
2. Sort each tab at the bottom of the spreadsheet to easily navigate. (Learn how on the [Downloading and Sorting Open Orders SOP](#).)
3. Prioritize triage efforts in this order:
  - a. Planned In-Hand Date
  - b. Past In-Hand Date
  - c. Open Orders
    - Shipped Status with Invoicing Errors
    - By Order Date, 60+ days and older, 30-60 days
4. Use the instructions below to understand how to triage each order based on the order status. Click here to jump to that section → [How to Triage based on warehouse status](#)
5. Utilize the notes column in Excel for any pertinent information and add comments to the order in FDM4. If necessary, update the in-hand and ship dates as you triage each. (Learn how to leave a comment here → <https://help.game-one.com/adding-comments-to-an-order>) (Learn how to change the ship date here → <https://help.game-one.com/how-to-change-plan-ship-date-and-in-hand-dates>)

## Reviewing Tip:

When reviewing your orders, make sure to search your Outlook for anything pertinent that might have occurred with the order already. Make sure to select "All Outlook Items" from the drop down.



## [How to Triage based on warehouse status](#)

- **Open Order** – This status usually means there is a remittance issue if it is a credit card order, or the order was not completed properly. It can also mean a backordered item split off onto a -01 order. Triage these issues to the appropriate departments.
  - **Remit issue** – reach out to the reps assigned Billing Analyst or go into the order, by using the Order Entry tool and editing existing order. Adjust the charge price on the remit screen to be accurately charged.
  - **Backorder split** – find out if they are truly expecting the split off item(s) and triage the order from there.
  - **Order Not Complete** – access the order and Review and Complete it again. If there are no order lines, and it's a few days old, cancel the order.
- **On Backorder** – This status means some or all the product is backordered or there is an art hold keeping it from moving to the next status.
  - **Check Product** – Check the "Purchase Order" and fill percentage. If all or part of the order is not showing received, use the FDM4 PO number to track the order on the vendor's B2B. If you do not have a vendor B2B, reach out to the Vendor via email. If there is no contact information for the Vendor, reach out to the buyer assigned (*Change Tracking* tab will show the username of the buyer assigned). If you located the tracking info and the product has landed, reach out to the warehouse, or tier 3 contact, to ask about getting it checked in.
  - **Check Art Holds:** If the product is not the issue, then the backorder may be a result of an art hold. View the Hold Column, then go to Proof Management to understand the proof status of the order. If Needs Proof, it means the proof has not been worked yet. If Proofing Complete (and a reasonable time has passed), reach out to the art coordinator for your area.



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- **FDM4 to D/C** – This status typically indicates that the order has a PO. Let's break it down by order type (or order codes):
  - **Order** – This is likely a non-decorated or decorated order.
    - If deco, you will see a PO attached to the order. This status will remain until the order is dropped to 'In Production'. Use the PO to track the product on the vendor's B2B site, by emailing the vendor, or using the buyer's assistance. If it's been delivered for a few days, reach out to the warehouse decorating the order with that information and ask for them to please receive the items.
    - If non-deco, that would mean the product has been allocated and just needs to drop to the warehouse for shipping. No action needed.
  - **Drop** – The order will remain in this status until it has been fully received by the customer, meaning the vendor invoice hasn't been vouchered by AP. Login to the vendor's site and use the PO to track and triage the order.
    - If the vendor does not have a site, send an email to the vendor contact, and ask for an ETA and tracking. (Not sure who to contact? Reach out to the lead buyer for your area or the custom ordering team for help.) If 30 days have passed since delivery, add this order to the MF Open Order Spreadsheet. (More information on this process here → <https://help.game-one.com/how-to-have-a-dropship-po-received/vouchered-manually-with-accounts-payable>)
  - **Custom Order** – The order will remain in this status until our accounts payable department is provided with an invoice or shipment confirmation for the order. Login to the vendor's site and use the PO to track and triage the order.
    - If the vendor does not have a site, send an email to the vendor contact, and ask for an ETA and tracking. (Not sure who to contact? Reach out to the lead buyer for your area or the custom ordering team for help.) If 30 days have passed since delivery, add this order to the MF Open Order Spreadsheet. (More information on this process here → <https://help.game-one.com/how-to-have-a-dropship-po-received/vouchered-manually-with-accounts-payable>)
  - **Tier 3 Decorated Order** – This order means the tier 3 has the art and product needed to produce the order. Check to see when the tier 3 received the art (DECPRODSTART in change tracking). If it's after their current turn time, reach out to the tier 3 for an update on when it will be completed. Make sure you have confirmed the product has been received and art has no holds before reaching out. \*For more information on checking Tier 3 order – visit <https://help.game-one.com/how-to-check-on-tier-3-order-status>.
    - If the tier 3 comes back stating that the order is complete, but you're still seeing this status. Please ask for them to scan this through their vendor portal so that we can invoice the customer. If they are unable to, please copy in Will Wyatt and Brandon Bollinger.
- **In D/C** – This means the order was received at 100%. This status should not need much triaging as the order should go to In Production/Shipped soon. If this status remains on an order for too long, work through the warehouse that the order is being decorated or shipped from and find out when it'll be moved to production/shipping or if there is anything they can do to get it moved through.



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- **In a Wave** – (Rare) – Order is dropped to the warehouse and waiting to be picked. Nothing needs to be done, unless you check change tracking and notice it hasn't moved in a few days. Reach out to your warehouse with this issue, or your manager for questions if you notice it "stuck" in this status.
- **In Picking** – Order dropped to the warehouse and waiting to be picked. No action needed – time will move this along.
- **Waiting on Production** – This is a status for Tier 1 facilities. Reference the current turn times to find out an estimated completion date from the WMSDROP. If you notice this is in this status longer than the turn time or approaching your in-hand date. Triage this to the appropriate warehouse to be received and moved to In Production.
- **In Production**
  - **Tier 1** - check the fill percentage and the allocation column for each line. If the WMSDROP date in change tracking is past the current turn times or approaching your in-hand date, proceed with contacting the correct department lead to get a production update on the order.
  - **Tier 3** – This status means the same thing as FDM4 to D/C at a Tier 3. Refer to the information above.
- **Production Complete** - If you notice either of these types of orders stuck in this status for a while, reach out to the warehouse producing the order and/or tier 3 contact to make sure it's shipped. If shipped, triage to your manager for Incorrect Warehouse Status, letting them know what status it needs to be in.
  - **Tier 1** – means the order is complete and should move to the next stages of packing and shipping the order out.
  - **Tier 3** – means the order is complete and should move to complete shortly.
- **Packing Complete** – will show this for OMG orders mostly. Check with the OMG department to find out the shipping status of this.
- **Shipped** – These should move to invoiced soon unless there is an invoice error. (See next section for shipped orders but showing an invoice error)
  - **Order** – Check the tracking in FDM4, under Shipment Waybills for the tracking information. Tier 3 orders might show tracking in the comments. If no tracking, for tier 3, reach out to the contact for that warehouse to get and update.
  - **Drop** – login to the B2B or contact vendor via email to get tracking.



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## How to Triage Shipped orders with Invoicing Errors

- 1) Sort the **Open Orders** spreadsheet by **Warehouse Status** and **Order Date** as shown here → [Understanding and Sorting an Open Order Report:](#)
- 2) Find orders in a **'Shipped'** status. Look in the **Invoice Error** column. This shows all orders that are shipped and have an error preventing them from invoicing. Triage these accordingly, utilizing **Review Customer Orders (RCO)** to investigate the order(s) based on the errors listed in the column. (Below is a list of invoice errors and how to triage)

	J	K	L	M	
	Terms	WH Status	Invoicing Error	Hold Code	De

- **“Reference” Errors** – Order is part of a bill complete order that split and at least one of the orders has not shipped. Look this up by Reference# in RCO and find the order causing the error. Triage the order to get it to a shipped status.
- **“DS PO” Errors** – Drop Ship has not been vouchered, which means the invoice has not been fully processed by AP. Obtain the tracking and invoice (if possible) for AP to be able to voucher this and move to shipped status. If only able to get the tracking, add to the MF Open Order Spreadsheet. (More information on this process here → <https://help.game-one.com/how-to-have-a-dropship-po-received/vouchered-manually-with-accounts-payable>)
- **“Bill By” Errors** – Order has been set to invoice at a future date (*Fall Bill of 7/1, 8/1, or 9/1*). If past that date, triage these to the rep/customer to get a PO, if necessary.
- **“PO Required for invoicing”** – Customer is set up as PO required account and no PO is entered on order. Bring this to the rep or customers’ attention for them to obtain a PO. (*No PO=No Commission*).
- **“Customer PO # Required”** – A PO number was entered on some but not all orders of a Reference (Parent) Order. Check the reference number and use the *Change Order – PO Update* pin to update the PO if able to.
- **“Ccard Process Failed”** – CC payment failed. Contact the rep to see if there is a new card we can run with their Billing Analyst.
- **“Credit Card Gateway Failure”** – Credit Card couldn’t process due to a network issue. Contact rep to see if there is a new card we can run with their Billing Analyst.



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## [Reviewing the Open Orders Tab on orders coming due in 10+ days.](#)

Since the **Planned In-Hand** tab looks for orders coming due in 10 days. We will want to further review the **Open Order** tab. Sort by *Order Date*, without the *WH Status* sorting level. Paying attention to the orders that are 30+ days past the Order Date, working the oldest first, follow the below (these could be orders with backorder dates, future orders, etc.) *If you've worked these already in previous tabs that's okay, just leave notes on them and move onto the next order.*

- Look for any '**On Backorder**' orders that should be in hand within the next two weeks, working the oldest first.
  - Find out what can be done to make sure the product is filled to 100%, art is approved and hold free, making sure to contact the warehouse team to get the order ready to move to '**Waiting on Production**' or '**FDM4 to D/C**'. While also allowing the appropriate time with each department.
- Look for any '**Waiting on Production**' or '**FDM4 to D/C**' orders that should be in hand within the next two-three weeks, working the oldest first.
  - Gauging the time from when it was moved into this status, to the day you are reviewing it. If it has been in this status for over two weeks, reach out to the tier 1 or tier 3 decorator for an update. Make sure to provide them with the correct and pertinent information.
- Look for any '**Open Order**' statuses.
  - Utilizing RCO (Review Customer Orders), investigate each. These more than likely are incomplete orders from being locked out at night or closing out of and not saving it), or there is an error as to why it's open yet (Like a remittance issue). Contact the rep on these to see if the order can be cancelled or if it needs to get it pushed through by us or a BA for the remittance issue.

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*If at any time you are unsure what to do with an order or are stuck. Please reach out to your manager with all of the order information so that they can assist.*

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