



**LEADERS HOLDING CO.**<sup>TM</sup>

Est. 1971

## **Managing Customer Accounts Review**

1. You can only find open customer orders by looking at the AIR report.
  - a. True
  - b. False
2. When back-ordering an item off the invoice, you have to e-mail accounts receivable in order to transfer the money to the back-ordered invoice.
  - a. True
  - b. False
3. In the look-up window the code "CN-TRN" stands for cancel-transfer.
  - a. True
  - b. False
4. The best way to prevent mistakes on tickets is to review the order with the customer before they leave the store.
  - a. True
  - b. False
5. Over 80% of delivery issues are caused by errors at the warehouse.
  - a. True
  - b. False
6. Sale Type 4s are delivery updated by the warehouse office.
  - a. True
  - b. False
7. When creating a credit memo and a LEAD-EXCHANGE the correct way to transfer the money is to enter "0" when the dollar amount pops up, and then enter in the new invoice number.
  - a. True
  - b. False
8. The correct way to ensure that Wells Fargo invoices are charged is to enter "CBD" for the method of payment.
  - a. True
  - b. False

**Sales Associate Name:** \_\_\_\_\_

**Employee ID#:** \_\_\_\_\_

**Date:** \_\_\_\_\_