# POI Process

POI is calculated each month by Continuous Improvement for orders shipped the prior month. These calculations come from data pulled from NetSuite combined with data provided by Supply Chain Management. Once the POI is calculated for the previous month, the results are sent to the Advantus Management team. The following are the steps for calculating the previous month’s POI.

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| Step | Action |
| 1 | SCM emails the previous month’s POI data to the POI shared mailbox by the 12th of the month. |
| 2 | CI accesses POI SharePoint folder on Advantus Compliance page  **Advantus Compliance/Documents/POI/POI** |
| 3 | CI selects the correct year for the data that is to be calculated |

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| Step | Action | |
| 4 | CI selects the folder for the last calculated month to copy the POI spreadsheet (Example: If trying to calculate December 2023 POI, would select 11\_November folder as that was the last completed calculated month.) |
| 5 | CI selects the completed **MM\_YYYY Month POI.xlsx** document in the folder and selects the **Copy to** option |

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| Step | Action | |
| 6 | CI navigates to the POI folder that matches the year and month that is currently being calculated and clicks **Copy here** option (Example: If trying to calculate December 2023 POI, would select 12\_December POI folder.) |
| 7 | CI selects newly copied document and then the **Rename** option |

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| Step | Action | |
| 8 | CI renames the document to **MM-YYYY Month POI.xlsx** for the month to be completed |
| 9 | CI opens the newly renamed spreadsheet to begin calculations |

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| Step | Action | |
| 10 | CI scrolls down to last completed Month summary and copies, then pastes it right below  A screenshot of a spreadsheet  Description automatically generated |
| 11 | CI renames month to calculating month and removes all data |

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| Step | Action | |
| 12 | CI logs into NetSuite selects **Compliance** center, **POI** then **POI Overall** function |

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| Step | Action | |
| 13 | CI records the data in **% ON-TIME** and **% COMPLETE** columns in NetSuite for the calculating month into the corresponding cell on the POI spreadsheet  **NetSuite Data:**    **POI Spreadsheet:** |

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| Step | Action | |
| 14 | CI opens the POI email from SCM for the calculating month and copies the attachment into the Year, Month POI folder in SharePoint.  **Email:**    **SharePoint folder:** |

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| Step | Action | |
| 15 | CI opens the **POI Results** spreadsheet from SCM |
| 16 | CI copies the data on the complete POI tab from SCM spreadsheet onto the Complete – NS tab of calculating month’s POI spreadsheet  **SCM spreadsheet tab:**    **POI spreadsheet tab:** |

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| Step | Action | |
| 17 | CI copies the data on the Remove from POI tab from SCM spreadsheet onto the Remove from POI NS tab of calculating month’s POI spreadsheet  **SCM spreadsheet tab:**    **POI spreadsheet tab:** |

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| Step | Action | |
| 18 | CI accesses **Compliance** center, **POI**, **Credits Issued** in NetSuite |
| 19 | CI updates the following filters on the Credits Issued report and then selects **Refresh**  **Credit Memo Reason:** C/S – Defective from Manufacturer  **From:** First day of the calculating POI month  **To:** Last day of the calculating POI month |

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| Step | Action | |
| 20 | CI exports returned report data into Excel and copies data |
| 21 | CI pastes Credit Issued data onto Damage Free tab on POI spreadsheet |

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| Step | Action | |
| 22 | CI pulls **Total Order Count** data from POI Performance YTD search for calculating month and enters that into # of Orders column on Damage Free tab of POI spreadsheet  **POI Performance YTD:**    **Damage Free tab:** |

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| Step | Action | |
| 23 | CI reviews the number of unique credit memos that correspond to the number of orders with damage and enters that data in the **# of Orders Damage/Def** cell on POI spreadsheet |
| 24 | POI spreadsheet formulas should then calculate **# Orders NOT Damage/Def** and **DAMAGE POI** fields |
| 25 | CI copies DAMAGE POI data from Damage Free tab back to main POI Month tab to the monthly summary field |
| Step | Action | |
| 26 | CI accesses **Compliance** center, **Compliance Overview** in NetSuite |
| 27 | CI pulls and exports to Excel all Violation Type fines related to missing or incorrect documentation for the calculating month    **Violation Types:**   * Documentation -BOL * Documentation -CI * Documentation \_Incorrect * Documentation – Invoice * Documentation -Late Document * Documentation – Packing List * Labeling – Incorrect * Labeling – Missing * Labeling – Placement * Labeling – Quality * Vendor - Documentation * Vendor - Labeling |

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| Step | Action | |
| 28 | CI copies exported data onto Accurate Documentation tab of POI spreadsheet |
| 29 | CI pulls **Total Order Count** data from POI Performance YTD search for calculating month and enters that into **# of Orders** column on Accurate Documentation tab of POI spreadsheet |
| 30 | CI reviews fine data and enters number of unique orders with documentation fines into **# of Orders W/Inaccurate Doc** column on Accurate Documentation tab of POI spreadsheet |

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| Step | Action | |
| 31 | POI spreadsheet formulas will then calculate **# of Orders W/Accurate Doc** and **% of Orders W/Accurate Doc** |
| 32 | CI copies data in **% of Orders W/Accurate Doc** on Accurate Documentation tab and adds to monthly summary field on POI Month tab |
| 33 | CI then calculates **Total POI** for the month by multiplying 4 POI variables on POI Month tab |
| 34 | CI completes YTD table with calculated month’s data on POI Month tab |

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| Step | Action | |
| 35 | CI fills in Total POI monthly data in line chart table on POI Month tab |

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| Step | Action | |
| 36 | CI creates a new email with the following data:  **To:** Advantus – Managers and Advantus – Dept Heads distribution lists  All Vice Presidents  All EC members  Office Administrator  **Subject:** POI Month Year  **Body of email:**   1. Copy of month’s summary from POI month tab of POI spreadsheet      1. Copy of POI Reason data from SCM POI Results spreadsheet |
| 37 | CI sends the email and moves it to **Sent** folder of POI mailbox |