



How To- Processing World Point Book Receipts & Sending Students Tracking & Pretest

Step 1: Login to the St. Louis Outlook Inbox

Locate any World Point Sales Invoice Transaction Emails with an attachment and open them

*They are sent from accounting@worldpoint.com

Focused Other By Date ↑

accounting@worldp...
Sales Invoice Transa... 12:59 AM
Thank you for choosing WorldPoint!: Sincerely,

accounting@wo...
Sales Invoice Tran... 12:59 AM
Thank you for choosing WorldPoint!: Sincerely,

accounting@wo...
Sales Invoice Tran... 12:59 AM
Thank you for choosing WorldPoint!: Sincerely,

accounting@wo...
Sales Invoice Tran... 12:59 AM
Thank you for choosing WorldPoint!: Sincerely,

accounting@wo...
Sales Invoice Tran... 12:59 AM
Thank you for choosing WorldPoint!: Sincerely,

Sales Invoice Transaction Number 422029090

accounting@worldpoint.com
To CPR St. Louis

422029090.pdf
102 KB

Thank you for choosing WorldPoint!

Sincerely,

WorldPoint Accounting

accounting@worldpoint.com
www.worldpoint.com

Step 2: Open the attached invoice and find the Tracking Information

The UPS tracking number, what we shipped the student, and the shipping address will all be on the paid invoice

at the heart of your training
Phone: (888) 322-8350

INVOICE 422029090
Invoice Date: 3/22/2022

Please Remit To:
Dept 10414
PO Box 87618
Chicago IL 60680-0618

Credit card payments accepted at WorldPoint.com

Bill To:
CPR St. Louis, LLC
476 Old Smizer Mill Rd
Fenton MO 63026-3553
United States of America

Ship To:
Mardella Brown
437 River Park Blvd
Taylorsville KY 40071
US

PO Number	Customer ID	Terms Description	Due Date	Order Number	Ordered By
3-22MardellaBrown	36454	Credit Card	03/22/2022	8220288289	WEB ORDER

Order Date	Salesrep	Taker	Page 1 of 1
3/22/2022	Rachael Weber	Administrator	

Catalog Number	Description	Order	Ship	BO	Gross price	Unit Price	Extended Price
20-1102	BLS Provider Manual	1	1	0	16.00	13.44	13.44
20-1106	ACLS Provider Manual	1	1	0	42.00	35.28	35.28

SUB-TOTAL: \$48.72
TAX: \$2.93
AMOUNT DUE: \$51.65 USD

Carrier: FREEOND
Delivery Method: Free Ground Shipping
Tracking Number: 128E04W60398717509

All credit memos expire 90 days from issuance



Step 3: Email the Student their Tracking Information and Pretest Instructions

Using the email template below, take the tracking number and shipping address and add them where appropriate in the email template

Attach the **Course specific** and **City specific** pre-course instructions to the email.

*These are located in Dropbox (username info@acls-bls-nashville.com)

Then go to folder **City Specific Pre-Course Instructions**

Open the “city” folder

Download the course specific PDF Pre-course letter(s) needed

Email the student from the City Specific Outlook inbox and copy info@aclsstlouis.com on the email for a record.

Email Template-

SUBJECT LINE- Your CPR Class Book Order Has Shipped and Instructions!

Hi [Name],

Great news! Your CPR book(s) order has shipped. You will use this to prepare for your class and complete the pre-course self-assessment. We have attached instructions on how to complete this.

The attachment provides instructions for how to prepare for your course, and how to access the pre-course self-assessment. **THIS MUST BE COMPLETED PRIOR TO YOUR CLASS**, and you must bring the completion certificate with you to class.

The shipment and tracking information for your book order is listed below.

UPS Tracking Number:

9405 5036 9930 0274 9196 63

Shipped to:

LAUREN MASLOWSKI
5450 MILTON RIDGE DR
ARLINGTON TN 38002-5010

You can track it easily by clicking on the following link and then entering your tracking number listed above: https://www.ups.com/track?loc=en_US&requester=ST/

If any information on your shipping address is incorrect, please reply to this email. We can update the information with the carrier to ensure your shipment still arrives on time!

Thank you again for choosing us for your training. We look forward to seeing you in class!

{Don't Forget to Insert City Signature in Email}



Step 4: Upload and Save the Paid Invoice Receipt to Dropbox

Go to Dropbox (username info@acsls-bls-nashville.com)

Then, 1-Receipts Folder

Then current year Receipts folder

Then World Point Receipts

Then KimJay Folder inside the World Point Receipts Folder

Open the current Month Folder

Upload and Title the Receipt

Title the invoice: date-World Point-Student Name-\$0.00

Example- 3-22-2022 World Point James Harris \$47.22

Step 5: Add the tracking information and confirmation for the uploaded the receipt to the World Point Spreadsheet

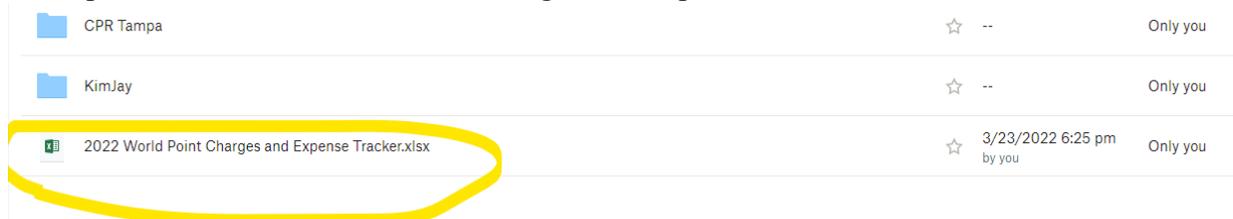
Go to Dropbox (username info@acsls-bls-nashville.com)

Then, 1-Receipts Folder

Then current year Receipts folder

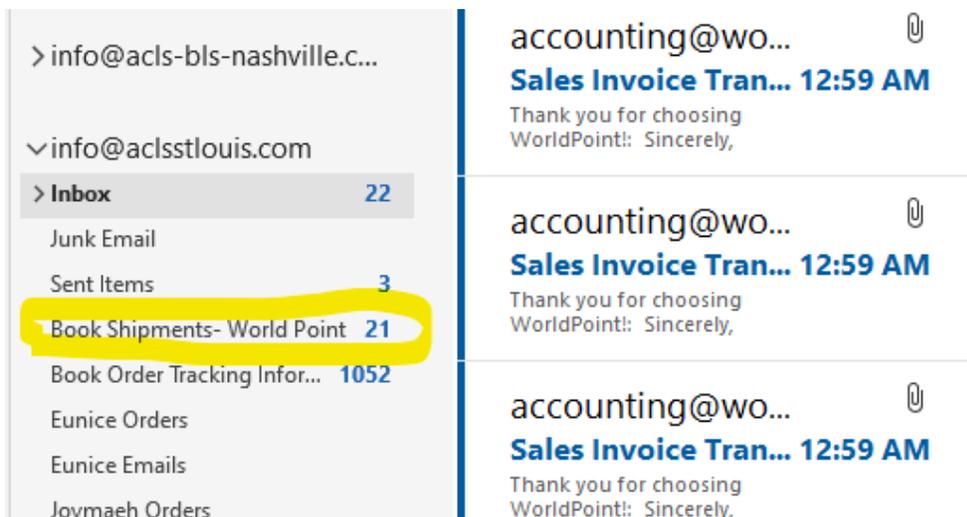
Then World Point Receipts

Then open the excel file World Point Charges and Expense Tracker



Add the tracking number and that you uploaded the receipt in the far right column for that specific order

Step 6: Move the World Point Sales Invoice email to the Book Shipments- World Point folder in the inbox



Step 7: Add the shipping details to the student block on CPR.Center

Find the customer's student block on CPR.Center for the order we shipped their book.

*To verify the correct order date, search the order # logged on the World Point Excel tracker in Dropbox for the student

In the notes section on the student block, add the following:

UPS Tracking Number

Shipping Address

Book type(s) & quantities Shipped

Example:

1 BLS and 1 ACLS Book Shipped 3/23/2022

UPS Tracking Number: 1Z8E04W60398217273

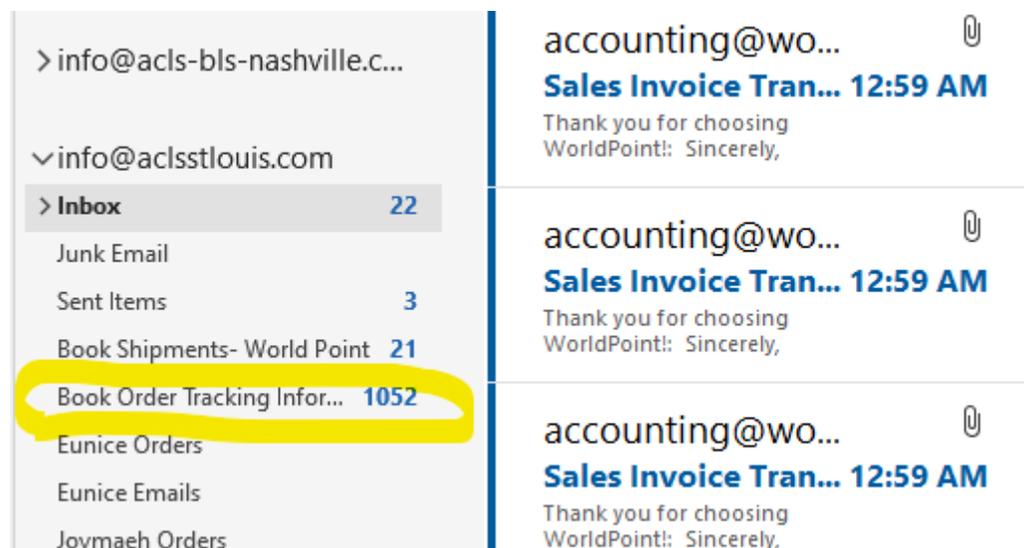
Ship To:

Sean Reese

410 42nd Ave. N. Suite 400

Nashville TN 37209

Step 8: Move the copied Student Tracking emails to the Book Order Tracking Information Folder



Step 9: Repeat this process for all World Point Sales Invoice Receipts