

Module Title:

Placing Account Holds When Buyer Payments Are Returned

Target Audience:

The primary audience is AR Operations analysts who process buyer payments daily, with a focus on the analysts hired within the last 12 months.

The secondary audience is the team leaders who, though they may not take the course, will have both a course and job aid to point AR analysts toward.

Learning Objectives:

Terminal LOs:

1. Apply an account hold independently as the first action upon notification of a returned payment, before initiating buyer outreach.

Enabling LOs:

1. Articulate the steps and conditions of the account hold procedure.

Seat Time: 5-8 minutes. As built, the course carries 4 minutes 45 seconds of narration across 12 slides, plus quiz response time.

Outline:

- 1.1 Welcome
- 1.2 Introduction / Goal
- 1.3 Navigation (optional, reached from the Navigation button on 1.1)
- 1.4 A Buyer Return Example
- 1.5 The Hold Process
- 1.6 Practice Scenario (three feedback layers)
- 1.7 Quiz Introduction
- 1.8 Question 1
- 1.9 Question 2
- 1.10 Question 3
- 1.11 Results Slide
- 1.12 Congratulations

Fonts:

Inter (Headings), Roboto (Subheadings, buttons, body). As built, the quiz and results slides (1.8 to 1.11) use Storyline's default Lato rather than the course fonts.

Color Palette:

Color Palette:

Swatch	Use	Color Name	Hex
	Headings / Titles	Deep Navy	#000A91
	Body Text	Ink	#00072B
	Buttons / Links	Brand Blue	#003CE6
	Highlights (dark bg only)	Electric Cyan	#00D4FF
	Icons / Accents	Coral	#FF7F51
	CTA Accent	Amber	#FFA500
	Light Background	Ice Blue	#ECFCFF
	Slide Background	White	#FFFFFF
	Secondary Text	Slate	#5B5F76
	Divider / Panel Border	Card Border Grey	#CFDDE0

Module Resources/References:

Job Aid_Placing Buyer Account Holds. Attached to the player Resources tab as a single PNG (Job Aid final.png). No PDF is attached in the published output.

Provided Assets:

AccountHolds folder has all visual and audio assets created for this course, along with .srt files for captions.

Directions:

The story map content is not to be altered, but the visual design contains broad strokes. The developer is free to choose avatar poses, select colors within the palette, and make layout decisions. Every effort should be made to maintain consistency with Vetracon's brand image projected on the company website.

Global Comments:

- Slide dimensions: 16:9 ratio, 1920 * 1080
- Where space permits, the Vetracon logo should be featured in the upper left of the page.
- Use the modern player in Storyline 360.
- The seekbar will be visible and controllable on all slides and layers, and navigation is assumed to be controlled by the player, except where noted in the storyboard.
- This course is, by choice, using a clean, minimalist aesthetic.
- Published settings: modern player, dark player theme, sidebar menu on, Resources tab on, player logo off, seekbar visible and controllable.
- The course logo is placed on the slide, upper left, rather than in the player.
- Quiz: one quiz group of three questions, pass mark 100%, unlimited retries, review permitted. No per-question feedback layers. Feedback is withheld until the Results slide.
- Captions: .srt caption tracks are published for the eight clips narrated by Sandra. Diego's internal-monologue clips have no caption track; his on-screen thought bubbles carry the same words.

Slide: 1.1 / Menu Title: Welcome			
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
Vetracon logo On brand image of AR rep at their desk. On brand accents	Placing account holds when buyer payments are returned. Navigation (button) Start (button) For captions, please press the “CC” icon on the bottom right of the menu bar.	(Sandra’s Voice—the narrator who will soon be introduced) “Welcome to this Accounts Receivable training on placing buyer account holds. For a quick tutorial on navigation, press the navigation button below. Otherwise, press Start to begin the training.”	The start and navigation buttons appear when the slide begins. The Start button will jump to slide 1.3 The Navigation button will jump to the next slide (slide 1.2) Next and Previous buttons are hidden on this slide.
Notes: The narrator, Sandra, has not yet been introduced, but her voice will be present in this slide.			

Slide: 1.2 / Menu Title: Introduction / Goal			
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
At the start of the slide: Vetracon logo, upper left. Slide title, upper center. Sandra, waving hello A light bordered content area in the center right. Pay by Invoice diagram: from the website. As the slide progresses: Sandra in “presenting” pose.	[Slide Title] Introduction and Goals [Pay by Invoice diagram] Pay by Invoice Buyer Seller [Training statement] In this training you'll learn how to respond to a returned payment alert. [Course Goal]	(Sandra) "Hello, my name is Sandra, and I'll be your guide through this learning experience on placing account holds. Vetracon provides sellers and buyers a smooth pay-by-invoice experience, but sometimes issues on the buyer side can result in a payment being returned by the originating bank. In this short training, you will discover how to respond to an alert that a buyer's payment has been returned. Specifically, you will learn to: Place an account hold immediately when a buyer's	Sandra will move from waving “hello”, to an explaining pose. The slide begins by showing Vetracon’s service and the interruption that payment returns causes, then presents the goal (LO) for the course.

Slide: 1.2 / Menu Title: Introduction / Goal			
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
Red X and highlight on the invoice diagram shows the problem with the buyer return. Present course goals and conditions.	Place an account hold immediately when notified of a buyer's returned payment. This needs to happen Before buyer notification Without waiting for approval	payment has been returned, prior to making contact with the buyer, and with no approval needed. This skill will help you better succeed in your role as an Accounts Receivable analyst, by limiting Vetracon's exposure to unnecessary financial risk."	
Notes:			

Slide: 1.3 / Menu Title: Navigation			
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
At the start of the slide: Slide title, upper center. A faded screen layout with menu and navigation. As the slide progresses: Caption labels appear with arrows pointing to each navigation control.	[Slide Title] Navigation Instructions [Component labels] Previous and Next Slides Settings Playback Speed Volume Replay Seek Bar Play / Pause Menu Navigation Show / Hide Menu	(Sandra) "The navigation bar for this course can be found under any content slide. To move forward to the next slide, or backward to the previous slide, use the Next and Previous arrows. To adjust viewing settings, select the gear icon, and to adjust playback speed, click here. To adjust the volume, click on the audio control icon, and to replay a slide's audio or video, press the Replay button. The seek bar has a slider that can be adjusted to any point in the audio or video, and you can toggle the Play/Pause button to	Caption labels fade in one at a time as the narration lists each navigation control, each with a pointer line to the control. Labels stay on screen once shown. Next returns the learner to slide 1.2.

Slide: 1.3 / Menu Title: Navigation			
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
		pause or continue. You can navigate to specific course slides using the menu on the left. And you can show or hide the menu using the menu icon at the top. When you have finished this slide, press Next on your navigation bar to continue."	
Notes: This slide is optional. It is reached from the Navigation button on 1.1, and its Next button returns the learner to 1.2 so nothing is skipped.			

Slide: 1.4 / Menu Title: A Buyer Return Example			
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
At the start of the slide: Vetracon logo, upper left. Slide title, upper center. Sandra, gesturing toward the scene. Diego, an AR analyst, at his desk. As the slide progresses: Diego moves between working and thinking poses. Thought bubbles carry Diego's reasoning, one at a time. A "Risk Incurred" stamp closes the scene.	<i>[Slide Title]</i> <i>A Buyer Return Example</i> <i>[Diego's text in thought bubbles]</i> <i>Hmm.. Something's wrong. I just received a notice that a buyer's payment has been returned to the bank for insufficient funds.</i> <i>I heard this sometimes happens, but I'm not sure what the procedure is.</i> <i>I can put a hold on the account, but is that escalating too far? I don't want to jeopardize any</i>	<i>[Slide Title]</i> <i>A Buyer Return Example</i> <i>[Diego]</i> <i>Hmm.. Something's wrong. I just received a notice that a buyer's payment has been returned to the bank for insufficient funds.</i> <i>[Diego thought bubble 2]</i> <i>I heard this sometimes happens, but I'm not sure what the procedure is.</i> <i>I can put a hold on the account, but is that escalating too far? I don't want to jeopardize any</i>	Sandra introduces Diego, then steps aside (or stays?) there while his scenario plays out. Diego has captions and poses that match the text. As Sandra explains the cost of Diego's choice, the "Risk Incurred" stamp appears.

Slide: 1.4 / Menu Title: A Buyer Return Example			
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
	<i>client relationships.</i> <i>Well.. Maybe I should contact the buyer first. They could already be resolving the issue.</i> <i>I'll send an email now, and wait until close of business to initiate the hold.</i> <i>[red stamp]</i> <i>RISK INCURRED</i>	<i>client relationships.</i> <i>Well.. Maybe I should contact the buyer first. They could already be resolving the issue.</i> <i>I'll send an email now, and wait until close of business to initiate the hold.</i> <i>[stamp]</i> <i>RISK INCURRED</i>	
Notes:			

Slide: 1.5 / Menu Title: The Hold Process			
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
At the start of the slide: Vetracon logo, upper left. Slide title, upper center. Sandra, presenting. A white content area in the center right. A "hold" icon beside the first line of the process.	[Slide Title] The Hold Process [Process statement] When you get a buyer return notice Apply an account hold immediately [Rule 1, next to the person icon] You do not need team leader approval	(Sandra) "When an AR analyst receives notification that a buyer's payment has been returned, they should immediately put a hold on the buyer's account. This action is our stated policy to buyers under these circumstances. There is no need to wait for approval from a team lead. Please note that initiating contact with the buyer is an important step, and it must be done the same day, but this	The process builds line by line as Sandra narrates it, with an icon appearing alongside each condition. Once the full process is on screen, the "Risk Avoided" seal appears The slide closes with the job aid callout and a short second narration clip pointing to the Resources link.

Slide: 1.5 / Menu Title: The Hold Process			
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
As the slide progresses: The process statement builds, with an icon beside each condition. A "Risk Avoided" seal appears. A Resources callout points to the job aid.	[Rule 2, next to the clock icon] Contact the buyer the same day, but only after the hold has been placed. [Closing note] Note: A helpful job aid is available at the link at the top right of the screen. [Seal graphic] RISK AVOIDED	comes after placing the hold on the account. Following these guidelines limits the risk that the buyer places further unfunded orders, which minimizes Vetracon's financial exposure." (Sandra) "To remind you of this process, a helpful job aid is available by clicking the Resources link on the upper right of any screen in this course."	Next advances to slide 1.6.
Notes:			

Slide: 1.6 / Menu Title: Practice Scenario			
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
At the start of the slide: Vetracon logo, upper left. Slide title, upper center. Diego at his desk, thinking. As the slide progresses: Diego's thought bubble sets up the decision. A white answer area on the right with three response buttons.	[Slide Title] Practice Scenario [Diego thought bubble] Hmm.. I just got another notice that a buyer's payment has been returned. At this point I think I should.. [Prompt] Choose the best response:	(Sandra) "Let's revisit Diego, and help him walk through the process of dealing with a returned payment." (Diego) Thought bubble text, read as internal monologue.	Sandra reintroduces Diego, then his thought bubble and the three response buttons appear together. Each button opens its own feedback layer and shows a marker beside the choice. (green check for correct and red x for incorrect). Choosing again replaces the layer.

Slide: 1.6 / Menu Title: Practice Scenario			
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
A correct or incorrect marker beside the button the learner chooses.	[Answer button 1] Contact my team lead for guidance [Answer button 2] Put the account on hold immediately [Answer button 3] Contact the buyer to resolve the issue		
Notes:			

Slide: 1.6a / Menu Title:			
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
At the start of the layer: Diego, working, composed. Replacement thought bubble.	[Diego thought bubble] Good. The hold has been placed, and now I can reach out to the buyer. That's everything I need to do for now.	(Diego) Good. The hold has been placed, and now I can reach out to the buyer. That's everything I need to do for now.	Diego's pose and thought bubble change to show the outcome of the correct choice, and a correct marker appears beside the answer he chose.
Notes:			

Slide: 1.6b / Menu Title:			
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
At the start of the layer: Diego, frustrated at his desk. Replacement thought bubble.	[Diego thought bubble] This isn't good. The buyer hasn't responded, but they already placed another order! That one is probably going to return as well. Ugh.	(Diego) This isn't good. The buyer hasn't responded, but they already placed another order! That one is probably going to return as well. Ugh.	Diego's pose and thought bubble change to show the consequence of contacting the buyer first, and an incorrect marker appears beside the answer he chose.
Notes:			

Slide: 1.6c / Menu Title:			
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
At the start of the layer: Diego, frustrated at his desk. Replacement thought bubble.	[Diego thought bubble] Oh no.. While I was waiting for a response from my team lead, the buyer sent in another order. This one is likely to be returned too. Ugh..	(Diego) Oh no.. While I was waiting for a response from my team lead, the buyer sent in another order. This one is likely to be returned too. Ugh...	Diego's pose and thought bubble change to show the consequence of waiting for team lead approval, and an incorrect marker appears beside the answer he chose.
Notes:			

Slide: 1.7 / Menu Title: Quiz Introduction			
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
At the start of the slide: Vetracon logo, upper left. Slide title, upper center.	[Slide Title] Quiz Introduction [Section heading] Quiz Features	(Sandra) "It's time to take a quiz to check your knowledge of the buyer payment return and account hold process. The quiz has three	Each quiz rule appears with its icon as Sandra introduces it.

Slide: 1.7 / Menu Title: Quiz Introduction			
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
Sandra, presenting. A white content area in the center right with a "Quiz Features" heading. As the slide progresses: Three icon and text pairs list the quiz rules.	[Feature 1] The quiz has three questions [Feature 2] You'll need to get 100% to pass [Feature 3] You may repeat the quiz until you pass	questions. You'll need to get 100 percent to pass. And you may repeat the quiz as many times as you like until you pass. When you are ready, press Next to continue."	
Notes:			

Slide: 1.8 / Menu Title: Question 1			
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
Vetracon logo, upper left. Question number and instruction line. Three answer choices	[Question number] Question 1 [Instruction] Choose the best answer [Question] Jenna, an AR analyst, gets a notification of a buyer return, what should be her first step? [Choices] Contact her AR team lead for advice Place an immediate hold on the	None.	The question appears in full and holds for the learner. Choices have hover and selected states. Submit evaluates the answer and moves the learner to the next question. If nothing is selected, the player prompts the learner to answer. There is no correct or incorrect feedback on the question slides. Feedback is held until the Results slide.

Slide: 1.8 / Menu Title: Question 1			
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
	buyer's account (correct) Initiate contact with the buyer to resolve the issue		
Notes:			

Slide: 1.9 / Menu Title: : Question 2			
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
Same layout as slide 1.8. Vetracon logo, upper left. Question number and instruction line. Same layout as slide 1.8. Vetracon logo, upper left. Question number and instruction line.	[Question number] Question 2 [Instruction] Choose "True" or "False" [Question] Peter, an AR analyst, just noticed a buyer return. He should immediately contact his team lead. [Choices] True False (correct)	None. This slide has no audio.	The question appears in full and holds for the learner. Same submit behavior as 1.8, with no feedback on the slide.
Notes:			

Slide: 1.10 / Menu Title: Question 3			
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
Same layout as slide 1.8. Vetracon logo, upper left. Question number and instruction line.	[Question number] Question 3 [Instruction] Choose the best answer [Question] Paula, an AR analyst, just got a buyer return. Which buyer contact rule should she follow? [Choices] The buyer must be contacted on the same day, but an account hold must be placed first. (correct) The buyer must be contacted before the hold is placed. The buyer can be contacted by the next business day.	None. This slide has no audio.	The question appears in full and holds for the learner. Submit advances to slide 1.11, the Results slide.
Notes:			

Slide: 1.11 / Menu Title: Results Slide			LO: LO 1, LO 2
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
Vetracon logo, upper left. "Results" heading, upper center. The learner's score and the	[Heading] Results [Left] Your Score	None on the base layer. Narration plays on the pass and fail layers.	The quiz shows the pass layer or the fail layer depending on the learner's score. Retry resets the quiz and returns

Slide: 1.11 / Menu Title: Results Slide			LO: LO 1, LO 2
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
passing score side by side. Review and Retry buttons.	%PercentScore% [Right] Passing Score %PassPercent% [Buttons] Review Retry		the learner to slide 1.8. Review reopens the question slides with the answers marked and the choices locked.
Notes:			

Slide: 1.11a / Menu Title:			LO: LO 1, LO 2
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
At the start of the layer: The base layer stays visible. Sandra, sympathetic pose. A "Sorry" banner with the fail message.	[Banner heading] SORRY [Message] You didn't pass the course.	(Sandra) "Sorry, you didn't pass. Please review the questions and try again. Remember, you can take the quiz as many times as you need to pass."	The fail banner and Sandra appear together as the narration plays. Retry and Review buttons underneath.
Notes:			

Slide: 1.11b / Menu Title:			LO: LO 1, LO 2
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
At the start of the layer: The base layer stays visible. Sandra, thumbs up. A "Congrats" banner with the pass message. An instruction to press Next.	[Banner heading] CONGRATS! [Message] You've passed this course. [Lower right] Press "Next" to finish the course.	(Sandra) "Great work! You passed the course. Feel free to review the questions, or press Next to complete the course."	The pass banner and Sandra appear together as the narration plays. Next is enabled from this layer only, and advances to slide 1.12.
Notes:			

Slide: 1.12 / Menu Title: Congratulations			LO:
Visual / Display:	Slide Text:	Narration / Voiceover:	Animation / Interaction:
Vetracon logo, upper left. Slide title, upper center. Sandra, presenting. A white content area in the center right with a "Great Job!" heading. A Resources callout pointing to the job aid. An Exit button.	[Slide Title] Congratulations! [Card heading] Great Job! [Closing note, next to the RESOURCES clip] Remember. The job aid is available at the link at the top right of the screen. [Button] Exit	(Sandra) "Thank you, and congratulations on completing this course. Remember to download your job aid by pressing the Resources link at the top of the screen. When you are ready, please press the Exit button to leave the course."	Everything appears at once with the closing narration. The Exit button closes the course.
Notes: The job aid is mentioned on 1.5 and again here, giving the learner two prompts to download it.			