

Customer Training Checklist

Start Up Screen Options

Start		
Run New Period		
Freshen Database		
Generate Statistics		
Update Version		
Business Name Selection		

Menu System & Shortcut Keys

Drop Down Menus		
Shortcut Keys		
Function Buttons		
Navigation Bar & Pg Up/Pg Down		

Product Control

Describe Fields (by category & tick boxes)		
Function Buttons (F2 – F12)		
Search Methods (partial part, keyword, alternates)		
Explain active Products V's Reference file products		

Customer Control

Describe Fields (by category & tick boxes)		
Function Buttons (F2 –F12)		
Search Methods (partial code, name & phone)		

Supplier Control

Describe Fields (by category & tick boxes)		
Function Buttons (F2 –F12)		
Search Methods (partial code, name & phone)		

Vehicle Control (Optional)

Describe Fields (by category & tick boxes)		
Function Buttons (F2 –F12)		
Search Methods (partial rego no, name & phone)		

Invoice or POS

Open screen Ctrl Z		
Search Customer (F3) Then F4 Add Customer on the Fly		
Search Product (F4) Then add Product on the fly		
Pricing & Discount Methods		
Demonstrate & Describe F11 and base screen details		
Update screen options e.g. Account & Large invoice tick boxes		
Update – sales person, payment type & update screen		
F6 Retrieve by Invoice No or By loading Customer first		
Open draw, Reprice, Adjust Total & Till Totals Button		

Supplier Order

Search Supplier by Code, Name or just F3		
Search Product (F4) Then add Product on the fly		
Supplier Part No (F7 in product control)		
Generate F4 using Min/Max Levels, Replace Sales or Fill customer orders		
View Graph F6, InStkQty, On C/O On S/O during the order process		
Retrieve Order F5 (direct or by supplier)		
Store/Recall		
F9 Cancel or F10 OK (describe update menu)		

Goods In

Search Supplier by Code, Name or just F3		
Retrieve Order with Scan Goods ticked (Scan Goods In)		
Mark Up Code, Pre-tax, Tax inc & Selling Prices, RC/TC update		
Retrieve Supplier Orders F5		
Retrieve Processed GI or DELDKT transactions & explain		
On the fly Labels F4 or at the GI Update screen		
Store/Recall		
F9 Cancel or F10 OK (describe update options) Labels and Reports		
Explain DELDKT process & explain effect on Creditor Balance		

Customer Receipts

Search Customer- Invoice – Amount (F3)		
Amount, Discount & Banking Details - Prepay		
Direct Apply & Shift Left-Click – Aging F5		
How to Reverse a payment and re apply		
Applying Credits against Invoices (neg/pos)		
F2 Unpaid Only		
Invoice Search F4 & extra search Fields		
Dispute F6 On / Off		
Cancel F9 & Ok F10 Amount to apply needs to be Zero		

Supplier Payments

Search Supplier (F3) & extended search fields		
Amount, Discount / Days & Banking Details		
Direct Apply & Shift Left-Click		
Aging F5 or manually		
Applying Credits against Invoices (neg/pos) & F2 Unpaid Only		
F2 Unpaid Only		
Invoice Search F4		
Dispute F6 On / Off		
Cancel F9 & Ok F10 Amount to apply needs to be Zero		

Product Menu Options

Product Browse Filters & Edit		
Stocktake Entry & Second Tab for write Offs		
Promotional Pricing & Importing Promo Files		
Percentage Price Change (After Backup)		
Order Maintenance		
Reference Products import and add to product file (F6)		
Update Reference Products from XL Spread sheet		

Reports

Customer		
Product		
Supplier		
Trading & POS		
Transaction		
Statements & Email Statements		
Bulk Email		
Trading Summary (Print)		

New Period & Reporting

Generate Statistics		
Run required reports		
Printing Statements		
External EOM Back up		
Run New Period		
Accessing previous months database		

Backup Procedure

Explain daily backup procedure to USB drives		
Explain Monthly Backup to CD		
Demonstrate and explain the importance to rotate USB		
Show how to monitor size of the backup		

Utilities

Trading Notes		
Product Groups / Subgroups		
Product Markup Codes		
Salesperson Setup		
User ID Setup		

Trained By: _____ **Business Name:** _____

Customer Signature: _____ **Date:** _____