



## Basic Features Training

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Company: \_\_\_\_\_ Signed: \_\_\_\_\_

Name: \_\_\_\_\_ Position: \_\_\_\_\_ Date: \_\_\_\_\_

**Trainee to Complete: Please tick**

1. [ ] **Group Functions**  
Do you know why ERP groups functions/or modules within tabs and how to access them?
2. [ ] **Windows Top Menu**  
Do you know how to access all of the functions from the windows top menu?
3. [ ] **Single to Lists**  
Do you know that, within a tab in the ERP Main Screen, most of the function icons in the top row are to create new entries and the ones below are to open lists of existing entries?
4. [ ] **Customise Main Screen**  
Do you know how to fully customize the ERP Main Screen for your individual needs?
5. [ ] **Product List**  
Do you know how to open both of the Product Lists - Express and Full?
6. [ ] **Find a Product**  
Do you know how to quickly find a Product in the list using the Search Column and Search Text fields?
7. [ ] **Columns - Sort**  
Do you know how to sort columns in the list by alpha-numeric ascending or descending order?
8. [ ] **Columns - Customise**  
Do you know how to customise your lists to display the columns you wish to view?
9. [ ] **Columns - Move**  
Do you know how to move columns around and place them where you want?
10. [ ] **Filters**  
Do you know how to filter in the list to show only specific details, then create a custom filter?
11. [ ] **Searching with F5, F6 and F7**  
Do you know how to use the F5, F6, F7 searching features? Also how to use the search box on the main screen.
12. [ ] **List Speed**  
Do you know how and why you would use the Date Ranges in a list or report?
13. [ ] **Customise Toolbar**  
Do you know how to customise the ERP Toolbar from the General Tab?
14. [ ] **Employee Preferences**  
Do you know how to set the personal Preferences for each Employee?

- 15.[ ] **Modules On/Off**  
Has training been given on how to turn off modules in ERP?
- 16.[ ] **Turn on Payroll (Australia only)**  
Do you understand what happens to the employee screen, when payroll is turned off?
- 17.[ ] **Access Help**  
Has the Help file been explained and how to access it?
- 18.[ ] **Help Search**  
Do you understand the search functionality?
- 19.[ ] **Telephone Message**  
Do you know how to create a Telephone message for an employee and how to enter to do's?
- 20.[ ] **Pop Up Reminders**  
Do you know where to set when and how your reminders display?
- 21.[ ] **Employee To Do's**  
Do you know where to set when and how your "To Do's"?
- 22.[ ] **Teamviewer**  
Has teamviewer quick support been install on your machine

**Notes:**

**Are there any aspects in this area that more training would be useful?**

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