General Training

Company:_____   **Signed**:_____

Name:_____   **Position**:_____   **Date**: _____

Trainee to complete: Please tick

1. [   ] **Shipping**
   Do you know how To create a New Shipping Method?

2. [   ] **Departments**
   Do you understand what a Department is?

3. [   ] **Department Reports**
   Do you know how you can divide your business into different cost centers?

4. [   ] **Terms**
   Can you create New Terms and also create the definition of the term?

5. [   ] **EOM Term**
   Can you discribe how EOM (End Of Month) works?

6. [   ] **EOM plus 20**
   Can you discribe how EOM (End Of Month) plus 20 works?

7. [   ] **Early Payment Discount**
   Where do you place an Early Payment Discount for Customers?

8. [   ] **Auto Discount**
   How does this effect the invoice?

9. [   ] **Discount Product**
   Which product is loaded to the invoice?

10. [   ] **Global List**
    What does the Global List display?

11. [   ] **Tax Code**
    Do you know how to view the Tax Code List?

12. [   ] **GST For Sales**
    What tax codes are used for sales?

13. [   ] **NCG For Purchases**
    What tax codes are used for purchases?

14. [   ] **Chart of Accounts**
    Have you assigned all tax codes for your chart of accounts?

15. [   ] **Customising The Toolbar**
    How To Customise your Toolbar?

16.[ ] **Memorised Transactions**
Do you know how a Memorised Transactions works within ERP?

17.[ ] **Reminders**
Do you know how to set your reminders within ERP?

18.[ ] **Templates**
Have you viewed a copy of the Report Builder Help file which will assist you in Template design and creation?

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

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