Sales Training

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Company:______________________________ **Signed:**______________________________

Name:_____________________ **Position:**_______________ **Date:** ______________

Trainee to complete: Please tick

1. [ ] **New Customer**
   Can you enter a New Customer?

2. [ ] **New From Transaction**
   Can you create a Customer from a Transaction?

3. [ ] **New Contact**
   Can you enter customer Contact Details?

4. [ ] **Customer List**
   How do you open the Customer List?

5. [ ] **Filtering Lists**
   Do you know how to filter a list or report to show only specific details?

6. [ ] **Quick Filters**
   What are the shortcut keys for a quick filter?

7. [ ] **Multiple Filters**
   Can you create a filter on a filter?

8. [ ] **Sorting Columns**
   How do you sort any column?

9. [ ] **Search on Columns**
   What are the 2 different methods for selecting a column to search on?

10. [ ] **Default Search Columns**
    What is the default search column in any list or report?

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. [ ] **Global Lists**
    What data is in the Global list?

13. [ ] **Transactional Search**
    Can you search the entire company file for a Global Ref No or Contact Name?

14. [ ] **Entering a Quote**
    Can you enter a Quote?

15.[ ] **Transaction Customisation**
How do you customise the grid of any transaction form, e.g. Quote?

16.[ ] **Quote List**
Can you open the Quote List?

17.[ ] **Reminders**
Does the Reminders prompts make sense?

18.[ ] **Reminders Settings**
Where do you set your own reminders?

19.[ ] **Entering a Sales Order**
Can you enter a Sales Order?

20.[ ] **Double Click Selection**
Do you know how to open the product list from the product drop down box?

21.[ ] **Product Status**
How do you check the status of any product on an order?

22.[ ] **Credit Limit Messages**
What happens when a customer exceeds their credit limit?

23.[ ] **On Hold**
What effect does the "On Hold" flag have?

24.[ ] **Entering an Invoice**
Can you enter an Invoice?

25.[ ] **Ship Quantity**
Why is the ship quantity in some cases not automatically filled in?

26.[ ] **Delivery Dockets**
Can you print a Delivery Docket?

27.[ ] **Entering an Refund**
Can you enter a Customer Refund?

28.[ ] **Invoice/Refunds**
Do you know where to find the refunds?

29.[ ] **Transaction Type**
How do you display the transaction types within the list?

30.[ ] **Renaming Columns**
Can you rename one of the columns on the list?

31.[ ] **Creating a Job**
Has it been explained how to create a customer job

32.[ ] **Job Profitability**
Would you use the job profitability function and if so can you create a job profitability report?

33.[ ] **Associating Costs**
Do you know how to auto load expenses for a job onto an invoice?

34.[ ] **Quote to Invoice**
Can you convert a Quote to an Invoice?

35.[ ] **Costs on Jobs**

Can you load customer details into a Purchase Order or Bill?

36.[ ] **Loading Costs**
Can you load costs into the relevant invoice?

37.[ ] **Quote to Sales Order**
Can you convert a Quote to a Sales Order?

38.[ ] **POS Sales**
Can you create a POS sale?

39.[ ] **Finding POS Sales**
Where can you find POS sales?

40.[ ] **Displaying Cash Sales**
Do know what a Cash Sales is used for?

41.[ ] **Sales Order Back Order**
Do you understand what a Back Ordered Sales Order is?

42.[ ] **Back Order List**
Do you understand how to get to Back Orders from the lists?

43.[ ] **Convert Sales Order to Invoice**
Do you understand what happens to a Back ordered Sales Order when it is converted to an invoice?

44.[ ] **Adding Comments**
Has it been explained how to enter a different comments by double clicking on the comments field?

45.[ ] **Shipping addresses**
Has it been explained how to enter a different shipping address by double clicking on the shipping address field?

46.[ ] **Pick From**
Can you have the goods picked up from a different location to the "Invoice To" and "Shipping Address"?

47.[ ] **Different Template**
Can you select a different template for the Invoice?

48.[ ] **Customer Types**
Do you know how to create a new Customer Type?

49.[ ] **Discounts**
Do you know how to set a permanent customer discount option?

50.[ ] **Product Discounts**
Do you know how to set a product customer type discount option?

51.[ ] **Auto Load Discounts**
What preferences do you need activated for this to work?

52.[ ] **Customer Special Price**
Can you load a special price for a customer from the quote?

53.[ ] **Group Discounts**
Do you know where to setup Product Group Discounts in the customer card?

54.[ ] **Discounts Video**
Have you watched the Discounts Video?

55.[ ] **Sales Reports**
Can you run a Sales Report?

56.[ ] **My Reports**
Can you personalise this report and save it as yours?

57.[ ] **CRM, Leads and Marketing**
Will you be using CRM and Marketing and if so, have you watched the videos etc on this area?

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

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