Inventory Training

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Company:_____   **Signed**:_____

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

Trainee to complete: Please tick

1. [   ] **Creating a Product**
Can you enter a New Product?: From Transactions: From Main Screen

2. [   ] **Grouping**
Are you using all 4 fields (Columns) to correctly identify your products?

3. [   ] **Entering a Margin**
Can you alter your Gross Margin or Markup for a Product?

4. [   ] **Auto Re-Order**
Do you understand why you would activate the Auto Re-Order function?

5. [   ] **Filtering Groups**
Can you apply filters to the groups you have created?

6. [   ] **Naming a Product**
Do you understand why we use logical names here, as opposed to codes?

7. [   ] **Product Types**
Can you explain the difference between the product types?

8. [   ] **Inventory Type**
Do you understand how an "Inventory" type product works?

9. [   ] **Non- Inventory Type**
Do you understand how a "Non-Inventory" type product works?

10. [   ] **Other Type**
Do you understand how "Other" type product works?

11. [   ] **Costing Methods**
Has the different costing systems within ERP been explained?

12. [   ] **Viewing Costs**
Do you know how to view your average cost of a product?

13. [   ] **Tax Codes**
Do you understand the difference between the purchase tax code and the sales tax code?

14. [   ] **Tax Codes and BAS/VAT**
Do you understand where these tax codes feed to?

15. [   ] **Related Product**
Do you know how to create a related product and how to nest, related products?

16.[ ] **Auto Shipping**
Do you know how to automatically receive all goods on an order?

17.[ ] **Customer History**
Do you know how to get a date driven sales history report from within a product?

18.[ ] **Changing Dates**
Can you adjust the dates from within the product customer history report?

19.[ ] **Drill Down**
Do you know that the history screens are drillable within each product?

20.[ ] **Supplier History**
Do you know how to get a date driven purchase history from within a product?

21.[ ] **Filtering History**
Can you apply filters to the history reports?

22.[ ] **Export Lists**
Can you export the Product list to excel?

23.[ ] **Stock Adjustments**
Can you process a Stock Adjustment?

24.[ ] **Adjust On?**
Do you understand the difference between doing the adjustment on the "In Stock" quantity and the "Available" quantity?

25.[ ] **Stock Departments**
Are you aware of what the department drop down will do to the stock quantities?

26.[ ] **Units of Measure**
Are you aware of what the UOM drop down will do to the stock quantities?

27.[ ] **Stock Take Video**
Have you watched the Stock Take Video?

28.[ ] **Auto Re-Order**
Can you manage your re-order points, per department?

29.[ ] **Running Auto Re-Order**
Do you know how to run the Auto Re-Order function and understand the Smart Order that is created?

30.[ ] **Customer Sell Prices**
Do you know how to create different sale prices for different groups of customers for the same product?

31.[ ] **Department Sell Prices**
Do you know how to create different sale prices between different Departments for the same product?

32.[ ] **Pop Ups**
Does the pop up reminder make sense?

33.[ ] **Product Pictures**
Can you load a picture for a product?

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

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