



Purchases Training

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Company: _____ Signed: _____

Name: _____ Position: _____ Date: _____

Trainee to complete: Please tick

1. [] **New Supplier**
Can you enter a New Supplier?
2. [] **Bank Details**
Why do we enter the banking details for a Supplier?
3. [] **New Contact**
Can you enter a Supplier Contact Details?
4. [] **New and 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?
5. [] **Bill v Purchase Order**
Do you understand the difference between a Bill and a Purchase Order with reference to accounts being entered on Bills, while products are entered through a Purchase Order?
6. [] **Last Account Used**
Can you turn on the preference to auto load the last used account?
7. [] **Entering a Bill**
Can you enter a Bill?
8. [] **New Purchase Order**
Can you enter a Purchase Order?
9. [] **Email PO**
How do you email this PO?
10. [] **Back Order PO**
Can you create a back order ?
11. [] **Receiving PO**
Can you receive the back order?
12. [] **Entering Invoice Number**
Can you enter the suppliers invoice for the back order?
13. [] **Entire Process**
Do you know how to do the entire process in one?
14. [] **Return Authority**
Can you enter a RA (Return Authority)?

- 15.[] **Negative PO**
Can you create a supplier product and account credit?
- 16.[] **Account Credit**
Can you create an account credit?
- 17.[] **Smart Order**
Can you create a Smart Order (Auto Reorder, Invoice, Repairs, etc)?
- 18.[] **Staff Requests**
How do you create a Staff request for products?
- 19.[] **Merging Smart Orders**
Do you know how to merge smart orders?
- 20.[] **Auto Create PO**
Do you know where the purchase orders are saved once created?
- 21.[] **Linking Sales to PO's**
Can you create a Purchase Order specifically for a customer?
- 22.[] **FX Preferences**
What do you need to turn on to use this module?
- 23.[] **FX Rates List**
How do you activate in-active rates?
- 24.[] **FX History**
Why is history with foreign exchange important?
- 25.[] **Landed Costs**
How do you view the landed cost of a product?
- 26.[] **Creating FX Purchase Orders**
Can you enter purchase order in foreign currency?
- 27.[] **Entering FX Values**
Where are the FX fields on a purchase order?
- 28.[] **FX Expense**
How would you enter any expenses related to importing goods?
- 29.[] **Relate to Purchase Order**
Do you know how to link import bills to Purchase Orders ?
- 30.[] **Importing Landed Costs**
Can you import the costs now associated with the purchase order?
- 31.[] **Adjusting Import Costs**
Can you adjust the allocation of these costs between the products on the purchase order?
- 32.[] **Don't Include Landed Costs**
Why is the landed cost separate from the average cost?
- 33.[] **Average v Landed**
Do you know where these values are displayed on the product card?
- 34.[] **Landed Cost Example**
Does the spreadsheet example make sense?

Notes:

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