



Inventory (Advanced) Training

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Company: _____ Signed: _____

Name: _____ Position: _____ Date: _____

Trainee to complete: Please tick

1. **Multiple Sell Prices**
Do you understand the main pricing structures within ERP?
2. **Customer Types**
Has it been explained how and why you would set-up client types?
3. **Extra Sell**
Has the Extra Sell price structure being explained in the Product setup?
4. **Date Ranged**
Has the Extra Sell price structure being explained in the Product setup?
5. **Sell Volumes**
How do you create price points based on sell volumes?
6. **Foreign Sell**
Has it been explained how to set the foreign currency value against a Customer?
7. **Extra Buy**
Can you enter extra Buy Prices for your Suppliers?
8. **Supplier Codes**
Can you enter the supplier codes for a product?
9. **Foreign Buy**
Has it been explained how to set the foreign currency value against a supplier?
10. **Importing Values**
Has it been explained how to import the Extra Sell and Buy prices?
11. **Serial Numbers**
Do you know how to turn on Serial Number Tracking?
12. **Allocation Of..**
How do Serial Numbers interact with purchase and sales transactions?
13. **Allocating Bins**
How do you activate bins to be used?
14. **Selling from a Bin**
How do Bins interact with purchase and sales transactions?
15. **Creating Batches**
How do you activate batches to be used?

- 16.[] **Allocating Batches**
How do Batches interact with purchase and sales transactions?
- 17.[] **Data Updater**
Do you know how to update bins/batches on mass through the inventory Data Update Button?
- 18.[] **Allocating Serial Numbers**
How do you activate Serial Numbers to be used?
- 19.[] **Creating Serial Numbers**
Do you know how to create and load Serial Numbers?
- 20.[] **Selling Serial Numbers**
How do Serial Numbers interact with purchase and sales transactions?
- 21.[] **F9**
How do you display Serial Numbers that are currently in ERP?
- 22.[] **Bill Of Materials**
Do you know how to use the manufacturing side of ERP?
- 23.[] **Barcode Picking**
Have you been shown the Barcode Picking for use in the warehouse area?
- 24.[] **Auto Adjust**
Have you been shown how the Auto Adjust Bins button works?
- 25.[] **Matrix Products**
Have you watched the Video on how to use Matrix Styled Products?
- 26.[] **Department Quantities**
How do you view what stock is in what location?
- 27.[] **Multiple Barcodes**
Where do you assign extra barcodes for the same product?
- 28.[] **Pop Up Messages**
Where do you assign messages for the product?
- 29.[] **Attachments**
How do you add documents to a product?
- 30.[] **Related Parts**
Do You know how to create a related product and how to nest related products?
- 31.[] **Customer History**
Can you view Customer Hlstory and product Movement?
- 32.[] **Pictures**
Can you add a picture to the product?
- 33.[] **Customisable Fields**
What can you track with Customisable Fields?

Notes:

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