Workshop Training

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Company:_____   **Signed**:_____

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

Trainee to complete: Please tick

1. [   ] **Servicing Equipment**
Do you understand what the Workshop module is designed to do?

2. [   ] **Equipment List**
How do you see which equipment you service?

3. [   ] **New Equipment**
Where can you add equipment from the main screen?

4. [   ] **New From Product**
How do you add equipment automatically by using a product?

5. [   ] **Quote for Equipment**
What is required to be on, for the equipment to save on the customer card when using on a quote?

6. [   ] **Load Customer Equipment**
Where does the equipment for a customer display?

7. [   ] **Unique Entries**
What doesn't load on the customer card using this method?

8. [   ] **Warranty**
Where can you enter the term of the warranty?

9. [   ] **Customer Equipment List**
How do you see which equipment is with which customer?

10.[   ] **One to Many**
What makes each piece of equipment with the same name, unique per customer?

11.[   ] **New Repair**
By assigning the equipment to the customer, what displays in a new repair?

12.[   ] **Using F8**
Where does this look for new equipment?

13.[   ] **Repair Status**
Where do you update this?

14.[   ] **Repair List**
How do you display all you current repairs?

15.[   ] **Regular Servicing**

Where do you setup repeat repairs?

16.[ ] **Reminders**
How do you display these repairs in your reminders screen?

17.[ ] **Products Used**
How do you add products to the repair?

18.[ ] **Multiple Repairs**
Why do you have the option to select equipment in the products tab on the repair?

19.[ ] **Parts on Repairs**
How do you display a list of all the products on all repairs?

20.[ ] **PO from Repair**
How do you create a Purchase Order from the repair?

21.[ ] **Appointments**
How do you create an appointment from the repair?

22.[ ] **Itinerary**
Where do you produce an appointment itinerary for each rep?

23.[ ] **Appointment to Repair**
How do you load the appointment times back to the repair?

24.[ ] **Timesheet**
Where do the times from the appointment display on the repair?

25.[ ] **Time Costs and Charges**
Can you load service charge outs as part of the Time sheet?

26.[ ] **Follow-ups**
Can you enter a follow-up for another employee?

27.[ ] **Notes**
Where do you do notes to suit?

28.[ ] **Attachments**
How do you drop attachments onto the repair?

29.[ ] **Repair to Invoice**
How do you create an invoice from the repair?

30.[ ] **Flag as Done**
Why would you flag the repair as done?

31.[ ] **Invoiced Repairs**
How do you view a list of the invoiced repairs?

32.[ ] **Creating Jobs**
Can you create a repair within a Job, within a Customer?

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

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