SMARTSystem Management Training Series
Training Session #0 - TRAINER OVERVIEW

Do you have a workstation in the conference room with a large enough monitor for today's training or should we do a Go To Meeting so each person can have their own session and use the conference call facility?

Please let me know.

The SMARTSystem Training System is for a Specialist to take a new trainee and really get them grooved in on an area of the System. This requires a combination of theory and practical application on the specific post (sales, buying, etc.).

Training consists of
- Trained training personnel who can train
- The materials from which to train
- Define tasks for training
- Use of training drills
- Demonstrate how one does a task

Training by a SMARTSystem Specialist will be done remotely using Log-Me-In.

Each training session will consist of:
- Follow-up questions and/or review from the previous training session
- The Purpose of each training session will be stated.
- Define the task for today's training and how it applies to the System and used.
- Definition of terms that will be encountered during each training session will be discussed and each trainee needs a level of understanding of what each term means.
- The SMARTSystem Specialist will show and demonstrate the task:
    - An initial overview of the task
    - Repeat the overview in more detail with questions and discussions during the process
    - Start the task from the beginning and flow through to the end
    - Have at least one person do the same task to get hands on familiarity and ask questions during the process.
    - When completed, each trainee will be assigned tasks to perform before the next training session

PRE-REQUISITES to Training:

1. The Server, SQL and SMARTSystem is installed and operational
2. Data Import completed and verified for:
   a. Customers
   b. Vendors and
   c. Inventory Items
3. Put a plan in place and make sure we keep both the old and SMARTSystem update-to-date with changes to Customers, Vendors and Inventory Items.
4. The Accounting Systems needs to be installed and operational.
5. Install SMARTSystem Import Tool (i.e. QB Importer) on the PC used in accounting to transfer data from the SMARTSystem to the Accounting Program.
6. Make sure the person running the EOD and data path for the SMARTSystem Import Tool is established.
7. Set a schedule to Management Training for 45 to 60 minutes each training period.

MANAGEMENT TRAINING SERIES (MTS) OVERVIEW:

1. System Overview
2. Menus, Staff Maintenance and Desktop Organization
3. Customer – Vendor Maintenance
4. Inventory Maintenance
   A. Inventory Management Quantity Hold Options
   B. Inventory Transfers
   C. Inventory Weighted Average Costs
5. Sales Processing
   A. POS Sales Order Processing
   B. Sales Order Line Hold
   C. Sales Standing Order Processing
   D. Sales Market Day
   E. Sales Discounts
6. Purchase Order Processing

      A. PO Continued
      B. PO Standing Orders
      C. PO Standing Order Processing
      D. Based Landed Costs Setup

7. Inventory Reconciliation
8. Inventory Pricing
9. Warehouse Order Management
10. Pre-Book Allocations
11. End-of-Day Processing
12. Inventory Pictures
13. SMARTSystem Updates
14. Physical Inventory

23. Appendix 1-System Control Options Defined
24. Appendix 2-System Control Sales Options Defined

25. Glossary

DATA CONVERSION Training is done first to:

ADMINISTRATOR Training is done first to:

1. Establish the G/L Accounts. The G/L Account Descriptions need to match the account descriptions in the accounting system, such as Quick Books.

2. Coordinate between G/L Accounts and the Product Categories.

3. Enter the G/L Accounts into G/L Accounts Maintenance. Note: leave existing accounts in place, but mark inactive until G/L Set-up completed.

4. Assign G/L Accounts to Inventory Items.

5. Assign G/L Accounts to System Control, G/L Tab.

6. Assign G/L Accounts to Vendor Expense.

ACCOUNTS Training:

1. The Accounting Systems needs to be installed and operational.
2. The SMARTSystem Import Tool (i.e. QB Importer) is installed on the PC used in accounting to transfer data from the SMARTSystem to Accounting Program.
3. Make sure the person running the EOD and data path for the SMARTSystem Import Tool is established.

MANAGEMENT Training Sessions

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- **Quick Start Guide.** The following link will download our online Quick Start Guide PDF. Simply select the link below and it will download the PDF. You can then print the document by clicking the "PRINT" icon (on the tool bar). We suggest saving this document on your computer desktop and

review from time-to-time, throughout this project to get familiar with the SMARTSystem System.

SMARTSystem Quick Start Guide
http://help.fcsglobal.info/PDF/SMARTSystemQuickStart.pdf

SMARTSystem HELP Documentation
http://help.fcsglobal.info/PDF/fcshelp.pdf

The HELP Documentation can be accessed directly in the SMARTSystem by selecting the HELP menu or pressing the F1 key on any program screen.