

# SMARTSystem Management Training Series

## Training Session #1 - INTRODUCTION

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**Purpose:** This Management Training Series (MTS) will provide a working knowledge of daily operational functions of the SMARTSystem.

### **Training Overview:**

- The Management Training Series is designed for management and senior staff to gain a full operational view of the SMARTSystem from data maintenance, to purchase order processing, to sales order processing and other key functions.
- These should be scheduled 3 to 4 days per week for a 3 or 4 week periods. It is recommended that a minimum of 3 days per week, preferably at the same time each day. There are at least 12 training sessions to cover these operational functions.
- We welcome questions. Depending on the questions and discussions each training session is designed to last approximately one hour.
- A document has been prepared for each training session and they will be sent to you a day before the training session is scheduled.
- The purpose of the training document is for each attendee to:
  - To follow along during the training session
  - Make notes on the document for questions and personal use
  - Keep the document for their own personal reference in a file or notebook

### **Pre-requisites to Management Training:**

- The software is installed and operational.
- Your Data has been imported and verified for:
  - Customers
  - Vendors and

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- Inventory Items
- By the 7<sup>th</sup> training session your Accounting System needs to be installed and operational.
- The SMARTSystem Import Tool transfers data from the SMARTSystem to the Accounting Program. It should be run to import the customers and vendors and to configure the tool. The Import Tool is usually installed on an accounting PC.

### **Outline of Management Training Sessions:**

1. Introduction
2. Menus, Staff Entry and Security
3. Customer/Vendor Maintenance
4. Inventory Maintenance
  - A. Inventory Maintenance
  - B. Inventory Quantity Hold Options
  - C. Inventory Transfers
  - D. Inventory Weighted Average Costs
5. Sales Processing
  - A. Sales Order Processing
  - B. POS Sales Order Processing
  - C. Sales Line Hold Processing
  - D. Sales Standing Orders Processing
6. Purchase Order Processing
  - A. Purchase Order Processing
  - B. Purchase Order Processing Continued
  - C. PO Standing Orders
  - D. Box Rate Based Landed Costs Setup
7. Inventory Reconciliation
  - A. Inventory Reconciliation
  - B. Physical Inventory using Laptop or Tablet
8. Inventory Pricing
9. Warehouse Order Management

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- 10. Pre-Book Allocations
- 11. End-of-Day Processing
- 12. Inventory Pictures
- 13. System Operations and Support
- 14. Physical Inventory
- 15. Driver Check-in for Stand-alone Laptops on Trucks
- 16. Go Live Event Checklist
- 17. Quick Books Reference
  - A. Quick Books Employee Name Setup
  
- 23. Appendix 1-System Control Options Define
- 24. Appendix 2-System Control Sales Options Defined
- 25. Glossary