

# **AGENDA**

## **Foundation Training Course**

### **1. System Set-up**

- 1.1 Entering Company Details
- 1.2 Setting Supplier Catalogues ready for use
- 1.3 Default Suppliers

### **2. Product Searching & Price Checking**

### **3. Using Help**

- 3.1 F1
- 3.2 Telephone
- 3.3 Email
- 3.4 Remote Desktop

### **4. Entering Contact Details**

- 4.1 Customers
- 4.2 Leads
- 4.3 Prospects

### **5. Producing Quotations**

- 5.1 Creating & Editing
- 5.2 Adding own Suppliers
- 5.3 Adding own Products
- 5.4 Adding Free Codes
- 5.5 Adding Fitting
- 5.6 Discounting
- 5.7 Add Product Notes
- 5.8 Print-Out Options

### **6. Costings – Checking your Margins**

### **7. Placing Purchase Orders**

- 7.1 Changing/Redirect Purchase Orders

### **8. Delivery Notes**

### **9. Full Invoicing**

### **10. Implementation Overview**