TRAINING GUIDE

PROJECT :

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BACK OFFICE OPERATORS / STORE KEEPERS

MASTER FILES

Item master
- ✓ Searching and viewing item details (Search by code, description, cost, selling, supplier and product category)
- ✓ Product grouping structure (Group, category, sub category, generic, manufacturer and brands)
- ✓ Understanding of pack sizes
- ✓ Understanding of how a new item is created by the head office. What criteria defines a new item (Change in any of the following will result a new SKU (Stock Keeping Unit) : Description, supplier, pack size, brand, manufacturer)
- ✓ Tagging suppliers to items
- ✓ Price changes (changing wholesales, cost, selling prices)
- ✓ Price formulas (supplier wise price formulas, supplier discounts, mark up and gross profit margins)
- ✓ Viewing price change report
- ✓ Handling of multiple prices (changing prices, viewing multiple price list, removing multiple prices)
- ✓ Changing item status (activating and inactivating an item)
- ✓ Viewing stock balances item wise (in the item master screen)
- ✓ Viewing transaction history of an item (bin card)
- ✓ Maintaining reorder level and reorder quantity
- ✓ Entering and maintaining shelf / rack numbers, taking shelf wise stock balance reports
- ✓ Discount controls in item level (active for discount status and how it works in the POS screen)

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Supplier master

✓ Master information on supplier master

✓ Credit limits and credit periods

✓ Contact details

✓ Order cycle

✓ Searching and viewing supplier details (search by code or name)

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TRANSACTIONS

General

✓ Details of a standard transaction screen format.

✓ Minimizing and maximizing transaction screen.

✓ How the transaction numbers are generated and saved.

✓ Selecting dates

✓ Selecting source locations

✓ Selecting destination locations

✓ Selecting suppliers

✓ Other reference fields

✓ Selecting / searching items in the transaction screen. (Search by using F2 key or searching matching products by entering letters from the description on the item code box itself)

✓ Navigating though fields in the transaction screen.

✓ Importance of entering actual expiry dates.

✓ Changing prices (costs and selling)

✓ Adding line discount amounts or percentages

✓ Handling of free receives

✓ Net discounts in transaction screen.

✓ Additions / Deductions

✓ Changing content of previously entered lines in a transaction.

✓ Removing a line in a transaction

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✓ Saving a transaction (Temporary save and process. Difference between the two process. Importance of processing every transaction real time)

✓ Recalling saved transactions.

✓ Viewing transactions listing summary and detail reports

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Purchase order / Purchase Request

✓ Raising reorder level based orders

✓ Raising average sales based orders (Trend Analysis Mode)

✓ Raising orders for selected product groups for a selected supplier

✓ Instructions on average sales calculation method

✓ Instructions on supplier order cycle

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Goods received notes

✓ Selecting a purchase order and recalling details to a goods received note
✓ Entering of actual received
✓ Checking of receiving cost prices, selling and pack sizes
✓ Checking of supplier invoice values and goods received note net values

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Returns to suppliers

✓ Referring to goods received notes when returning goods
✓ Selecting expiry batches of the returning goods
✓ Stock balance controls when returning goods

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Transfer of goods

- ✓ Issuing goods to an external location
- ✓ Receiving goods from an external location
- ✓ Stock controls in issuing goods

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Physical stock verification process

- ✓ Instructions on stock verification process (covering 3 stages initialization, entering and variance monitoring and updating)
- ✓ Initialization process
- ✓ Printing of stock counting sheets
- ✓ Stock entry
- ✓ Understanding variance reports
- ✓ Updating counted stocks
- ✓ Viewing historical details on stock variances in previous counts

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REPORTS

General
- ✓ List of reports (type of reports available)
- ✓ Instructions on using report filtering screen
- ✓ Selecting groups
- ✓ Selecting date period
- ✓ Selecting locations
- ✓ Selecting suppliers
- ✓ Selecting transaction status (processed / unprocessed / all)
- ✓ Selecting stock status (available / negative / excluding zero/ all)
- ✓ Selecting product status (active / inactive)
- ✓ Selecting report modes (summary / details / case wise / etc)
- ✓ Standard printing and exporting options
- ✓ Changing a printer and page setup in printing reports
- ✓ List of reports which will be explained in detail;
  - o Stock balance
  - o Stock valuation
  - o Bin card
  - o Transaction listing
  - o Price changes
  - o Counter wise sales
  - o Shift wise sales
  - o Cancelled invoice listing
  - o Order summary and details
  - o Product profitability
  - o Cost of sales
  - o Shift wise variance
  - o Daily sales registry

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POINT OF SALES

MY CHECK OUT
General
- ✓ Maintenance of individual user Ids and passwords
- ✓ Log in and out of the system
- ✓ Understanding the login screen toolbar
- ✓ Short cut keys and function keys
- ✓ Searching for an item in the POS screen (search by code, name, price, group, category, sub category, generic, manufacturer and brand)
- ✓ Entering items using barcode scanners
- ✓ Importance of entering actual expiry dates when invoicing
- ✓ Completing a line in the invoicing screen
- ✓ Giving discounts (line discount amounts, percentages)
- ✓ Giving net bill discounts
- ✓ Recalling predefined customers
- ✓ Browsing up and down in the invoice grid
- ✓ Voiding an item
- ✓ Accepting sale returns
- ✓ Resetting a screen
- ✓ Reprinting of orders / invoices
- ✓ Cancelling a order
- ✓ User authorization of special actions (such as sales returns, discounts, refunds, etc)
- ✓ Completing a transaction
- ✓ Holding and recalling a transaction
- ✓ Adding entries to the lost sales report
- ✓ Checking pending unsettled bills from order counters
- ✓ Calculating prices lists for customers and informing the customer on the bill totals
- ✓ Changing quantities of an order before saving
- ✓ Entering reason codes for sales returns and cancellations

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CASHIERS

✓ Sign on with float cash management

✓ Recalling orders

✓ Completing a normal invoice (Cash sale)

✓ Completing a credit card sales

✓ Completing a sale with multiple payments

✓ Error corrections in data entry (resetting screen, changing a payment mode, chaining amounts entered)

✓ Credit bill controls with credit limits

✓ Sign off

✓ Back office sign off process including how to declare physical collection at the end of the day

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MANAGERS / SUPERVISORS

General
- ✓ Authorizing special actions such as discounts, sales returns, refunds
- ✓ Cash receipts
- ✓ Cash withdrawals
- ✓ Authorizing back office functions such as excess receives, batch processing of transactions
- ✓ Audit check list reports
    o Stock valuation summary
    o Negative stock balances
    o Expiry report
    o Shift wise collection report
    o Daily sales registry
    o Cancellation report
    o Discount report
    o Un-invoiced orders
    o Invoice re-print log
    o User activity log
    o Price changes log
    o Unprocessed back office transactions
- ✓ Spot-checks from back office
- ✓ Back office sign off process and cash handover monitoring of cashiers
- ✓ End of day process
- ✓ Month end process
- ✓ Maintenance of daily backup

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Signoff

Comments by Project Manager	

Date and Signature of
myPOS Project Specialists

Date and Signature of the
Customer Project Manager

Project Specialist/Demonstrator
 myPOS

Customer Project Manager

Office Use Only

Issued Date			
Received Date			
Project Owner			
Training done by			
Remarks			

Checked By :

Training Date	Checked & Confirmed by				Remarks
	Project Manager	**Date**	**C/S Manager**	**Date**	

Manager	Signature	Date	Remark
Ms.Mithila Jayasundara (Senior Project Manager)			
Mr.Chathura Hettiarachchi (Senior Customer Support Manager)			
Mr.Tharindu Jayaruk (Customer Support Manager)			
Mr.Zihan Mohamed (Customer Service Manager)			