

Sympac Training | Business Change Over
Person Completing this Form

Title:

Please indicate whom will be completing the training with the new Business Owners.

Sympac can provide the training at the current hourly rate if requested below

Store Name:
Current Business Owners Name:
New Business Owners Name:

Current Owner	OR	Sympac to Quote & Train
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System Overview
Start-up/Shut-Down Computer
Log-In / Log-out / Exit / Options Button
Interacting with SYM-PAC
Using the Help Desk
Help Desk Escalation procedure
Stationery Orders using Sympac Online

30 minutes		
30 Minutes		

Point of Sale - In Brief
Cash sales
Debtor sales
EPC search, including an explanation of EPC structure, viewing and copying products
Customer Orders - Cash and Debtors
Debtor receipts
Parking and loading dockets
Quotes
Processing an Adjustment Note to a Customer's Account versus Cash Sale Credit Note

1.5 Hours		

Advanced POS Training
Creating, searching, loading and deleting customer dockets
Altering, making payments and reprinting customer dockets
Transaction enquires on cash customers and debtors
Debtor file maintenance from POS
Methods to re-price dockets
Credit mode / quote mode
Creating, altering and printing a quote
Rolling a quote to a customer order, with part deliveries and invoicing stage
Loading PDEs at POS
GST exempt sales

1.5 Hours		

EOD Procedures
Till Balancing
Entering Unders/Overs
End Of Day Procedures
Backup Procedures (including reviewing successful backup report)
Combined Till Report
Daily Gross Profit Report
Monthly Store Performance Report
Audit Lists

1 Hour		

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	Current Owner	OR	Sympac to Train
End Of Month Procedures	1 Hour		
Statements			
Aged Debtors			
Stock Status Report			
Monthly Till Report			
Margin Protection Strategies	30 Minutes		
When to take up cost and RRP changes (Comp Report, Inwards Goods, Supplier Price Lists, etc)			
Daily Gross Profit Report Exceptions - why are things listed as exceptions, strategies to reduce exceptions			
Margin Exceptions Report			
Setting Budgets	30 Minutes		
Monthly Store Performance - Sales and Cost of Business			
Open To Buy Budgeting			
Advanced Inventory Training	1.5 Hours		
Kits, Packages, Product Splitting, Associated Products			
Table Magic			
Global Alters			
Printing from on screen enquiries, Saving screen enquiries to CSV			
Strategies for Setting Min/Max stocks - Setting Min Stocks, via PDE/PDA			
Gap Management			
Suggested Order Report			
Management Reporting	1.5 Hours		
Sales Reports - Customer, Inventory, Invoice History			
Stock Status Report			
Dead Stock Report			
Units Sold Report			
Catalogue Performance report			
Report Generator			
Design & Document Monthly Reporting procedures			
PDE / PDA Usage	30 Minutes		
Menu			
Gap Management			
Review Stocktaking			
Review Purchase Ordering			
Review loading to TBO			
Review Labelling			
Review Setting Retail Pricing			
Review Setting Min/Max Stock Levels			

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	Current Owner	OR	Sympac to Train
Debtor Training	2 Hours		
Debtor Transaction Enquiry - active transactions vs full transaction list			
Function Keys in Debtor Transaction Enquiry (Main)			
Function Keys in Debtor Transaction Enquiry (Window)			
Function Keys in Debtor File Maintenance			
Auto Contacts			
Transaction History Search			
Contract Pricing and Global Contracts			
Future Contracts			
Invoice Reporting			
Notes Reporting			
Financial Period Changes			
Customer Order Reports			
Debtors Receipting			
Debtors Average Days to Pay information			
PDF and Emailing Options for Customers - Invoices, Quotes, Statements, etc			
Pricing & Discount Structures			
Debtor Journals			
Debtor Allocation processing			
Back Office Debtor Receipts			
Transaction Lists			
Audit Lists			
Exporting debtor information for mail merges			
Surcharges on tender types			
Labeling Procedures	30 Minutes		
Review Queueing Labels from the Comparison Report			
Review Queueing Labels from the PDE			
Review Manual Label Queue			
Printing Labels			
Running the Price Update			
Purchase Ordering	1 Hour		
Creating a Manual Purchase Order			
Creating a Promo Order			
Using the Suggested Order Report			
Using the To Be Ordered System (POS, Suggested Order, Manually)			
Goods Inwards			
Goods In Matched to Purchase Order			
Goods In Unmatched			
Goods In Auto			
Managing Cost Changes			
Reporting Options			

Sympac Training | Business Change Over | Additional If Applicable

	Current Owner	OR	Sympac to Train
Buying Group Procedures if Applicable	1.5 Hours		
Collecting Buying Group Updates			
Processing Buying Group Updates			
Loading Electronic Invoices			
Comparison Report			
Receipting Against Electronic Invoices			
Placing an Order via SYM-PAC's Buying Group Interface			
Creditors	2 Hours Minimum		
Creditor Insert / Alter / Delete			
Creditor invoice Entry / adjustment note input			
Creditor Invoice Input - Match to delivery Batch			
Creditor Payments - Manual			
- Batch payment (direct deposit bank file)			
- General ledger postings			
- Prompt payment			
Release / Hold function x Creditor			
Release / Hold function - Batch All			
Creditor reconciliation			
Creditor trial balance (aged creditors)			
Creditor reporting - Creditor listing			
- Transaction listing			
- Cash requirements			
- Remittance advice			
Claims processing - Return to supplier			
- Overcharge			
- Match claim to Adjustment note			
General Ledger - Manual	4 Hours Minimum		
File maintenance - Insert / Alter / Delete			
Transaction Enquiry			
Transaction Listing			
Manual Journals			
Pending Transactions - Listing / report			
- Review / edit pending transactions			
- Update pending transactions			
Profit & Loss Report			
Balance sheet			
Trial Balance			
Yearly Analysis			
Budgets vs Actuals reporting			
Transaction Listing			
BAS Reporting			
BAS transactions			

Sympac Training | Business Change Over | Additional If Applicable

	Current Owner	OR	Sympac to Train
General Ledger - Integrated			
	4 Hours Minimum		
Sales Journals - By Department versus by Day - What Reports to Balance To			
Banking Journals - Integrated from Cobined Tills - Integrrated from Bank Deposit Form			
Stock Adjustments			
Inwards Goods & Goods Received Not Yet Charged - Discussion of concept and ramifications			
GRNYC Reporting			

	Current Owner	OR	Sympac to Train
Payroll			
	2 Hours Minimum		
Payment, Allowance, Deductions Codes			
Tax Scales			
Setting up Payroll tables - Bank Acc details - Divisions, Cost Centres, Unions, etc			
Employee File Maintenance			
Setting up PAD codes for individual employees			
Setting up Annual Leave, Sick Leave, Long Service Leave accruals			
Handling exceptions - Salary Sacrifice, Employee Contributed Super, HECs			
Processing Weekly / Fortnightly / Monthly pay periods			
Printing Payslips and Updating Pay Summaries			
Configuring and Reviewing the Pay Details Report			
Creating Bank Transaction File to Import to Banking Software			
Superannuation Set up			
Superannuation reporting & payment			
Superannuation exceptions/adjustments			
Single Touch Payroll (STP) set up and processing			

Existing Store Owners to Agree and Sign:

I agree that the above register of training will be completed and that the new business owners understand the areas they have been trained in.

Name: _____ **Date:** _____

Signed: _____

New Store Owners to Agree and Sign:

I Agree to the Business Change Over Training Requirements. Training will be quoted as part of the business change over if requested above for Sympac to complete the training as outlined above. Alternatively training MUST be carried out by the existing store owners and staff.

Name: _____ **Date:** _____

Signed: _____