This catalog lists the free courses available to existing SOS Inventory customers with an active SOS account. If you are interested in taking one or more of the classes outlined in this document, please see the registration section after the course descriptions.

Course List

Course Descriptions

This section will provide the information on what each course covers, who should take the course and, when the course is provided, and how long the training approximately takes to complete. Training is provided by Saddle Oak Software support technicians.

1000 – Starting SOS Inventory and Key Settings

Who:	Administrators regardless of plan level primarily.
How Long:	1 Hour 30 Minutes
Format:	Group Presentation
Timing:	Recurring twice each week

Topics:

- ✓ Starting and Connecting
  - o Pitfalls and hurdles (Conversions, etc.)
- ✓ Setting Up Users
- ✓ QuickBooks Online Settings
- ✓ Configuration Settings in SOS Inventory
  - o Inventory
  - o Purchasing
  - o Sales
- ✓ Additional Settings
  - o Under the Gear Icon
  - o Under the Company Menu

1001 – New Customer Orientation

Who:	New customers regardless of plan level.
How Long:	1 Hour 30 Minutes
Format:	Group Presentation
Timing:	Recurring twice each week

Topics:

- ✓ Overview of main areas in the software
  - Task Bar
    - User Menu, Notifications, Global Search, Quick Add, Sync Menu, Resources
  - Operations Menu
    - Managing your day (Dashboard/Calendar)
    - Inventory Overview (Items)
    - Purchasing Overview
    - Sales Overview
    - Production Overview
    - Reports
  - Company Menu (Miscellaneous Options, Bulk Edit)
- ✓ How to get help

1002 – Data Import

Who:	All Users
How Long:	1 Hour 30 Minutes
Format:	Group Presentation or Upon Request
Timing:	2 Sessions Per Month
Topics:	✓ Import / Bulk Edit (Rules and use) ✓ Items ✓ Customers ✓ Vendors ✓ BOMS ✓ Price Tiers ✓ Sales Orders / Sales Receipts

1004 – Serialized Inventory

Who:	Plus and Pro Users
How Long:	45 Minutes
Format:	Group Presentation or Upon Request
Timing:	2 Sessions Per Month
Topics:	✓ Adding a new serial item ✓ Serial item list ✓ Adjusting serial items ✓ Receiving serial inventory / Auto serial settings ✓ Warranty

1005 – Lot Inventory

Who:	Plus and Pro Users
How Long:	45 Minutes
Format:	Group Presentation or Upon Request
Timing:	2 Sessions Per Month
Topics:	✓ Adding a new lot item ✓ Lot item list ✓ Adjusting lot items ✓ Receiving lot inventory / Auto lot settings ✓ Expirations and recalls

1007 – Units of Measure

Who:	Plus and Pro Users
How Long:	45 Minutes
Format:	Group Presentation or Upon Request
Timing:	2 Sessions Per Month
Topics:	✓ Enabling ✓ Defining UOMs ✓ Applying UOMs to items (Base and conversions) ✓ UOMs in transactions ✓ Changing base UOM

1010 – Sales Workflow

Who:	All Users
How Long:	1 Hour 30 Minutes
Format:	Group Presentation or Upon Request
Timing:	2 Sessions Per Month
Topics:	✓ Standard Workflow (Sales Order → Shipment → Invoice) ✓ Starting with the Invoice ✓ Starting with an estimate ✓ Sales receipts for in person orders ✓ Affect transactions have on inventory ✓ Drop ship sales orders ✓ Applied to links ✓ Returns / RMAs

1011 – Purchasing Workflow

Who:	All Users
How Long:	1 Hour 15 Minutes
Format:	Group Presentation or Upon Request
Timing:	2 Sessions Per Month
Topics:	✓ Purchase Orders ✓ Drop Ship Pos ✓ Receiving and Item Receipts ✓ Other costs

1013 – Form Templates

Who: All Users
How Long: 1 Hour
Format: Group Presentation or Upon Request
Timing: 2 Sessions Per Month
Topics:
- ✓ Form Template List
- ✓ Editing a form template (Rules and merge fields)
- ✓ Using a form template

1015 – Custom Fields

Who: All Users
How Long: 45 Minutes
Format: Group Presentation or Upon Request
Timing: 2 Sessions Per Month
Topics:
- ✓ Defining a custom field (naming, field types, used on)
- ✓ Use on edit pages and lists
- ✓ How to attach to form templates
- ✓ Sharing custom fields with QuickBooks Online
- ✓ Additional Uses

1017 – Advanced Manufacturing

Who: Pro Users
How Long: 1 Hour 30 Minutes
Format: Group Presentation or Upon Request
Timing: 2 Sessions Per Month
Topics:
- ✓ Process templates
- ✓ Process transactions
- ✓ Setting up workcenters for Work In Progress (WIP) manufacturing
- ✓ Using workcenters in builds and process transactions
- ✓ Work Orders to schedule manufacturing
- ✓ Labor items and workers

1020 – Troubleshooting Sync Errors

Who:	All Users
How Long:	45 Minutes
Format:	Group Presentation or Upon Request
Timing:	2 Sessions Per Month
Topics:	✓ Preview Sync list ✓ Sync Errors list ✓ Sync column in Transaction lists ✓ Bills and Purchases lists ✓ Common errors and how to fix

1022 – Reconciliation Process

Who:	All Users
How Long:	1 Hour 15 Minutes
Format:	Group Presentation or Upon Request
Timing:	2 Sessions Per Month
Topics:	✓ Why Reconcile ✓ Understanding Where Errors May Occur ✓ Reconciliation Process ✓ Reconciliation Tools ✓ Other Factors That Can Cause Mismatch

2000 – SOS Payments

Who:	Master Administrator
How Long:	45 Minutes
Format:	Group Presentation or Upon Request
Timing:	2 Sessions Per Month
Topics:	✓ What is SOS Pay ✓ Setting Up SOS Pay ✓ Payments List ✓ SOS Pay List ✓ Merchant Track ✓ Reporting

Course Registration

Courses must be registered for in advance on the SOS Inventory website at this URL: https://www.sosinventory.com/customertraining

If you have more than 1 person attending from your location, you must send an email to training@sosinventory.com to allow for attendee processing. Email should have the following:

1. The SOS account number in the subject line
2. In the body of the email:
    a. List the courses desired to include the date of the course (based on course schedule at the website above).
    b. The attendees for each course to include the first and last names.
    c. The attendees email.

Sample email request:

> To: training@sosinventory.com
>
> Subject: Request for Training – SOS Account 26120
>
> Please register the following people for the training sessions listed.
>
> 1000 New Customer Orientation, 7/27/2018
>
> John Doe, jdoe@mycompany.com
>
> Jane Smith, jsmith@mycompany.com
>
> Regards,
>
> Jason Jackson
>
> 972-455-6173

A request for any training course to be customized for more in-depth training can be submitted via email and should include a point of contact and phone number so a trainer can get back to you to discuss training requirements. There will be a fee associated with the customized training and will be determined on the initial requirements call. All payments will be charged to the credit card on file.