



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.

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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.



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 SOS Inventory Training Department.

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
 - Pitfalls and hurdles (tracking, etc.)
 - ✓ Quickbooks Online settings
 - ✓ Setting up users
 - ✓ The Company Menu
 - ✓ Configuration settings in SOS Inventory
 - Inventory
 - Purchasing
 - Sales
 - ✓ Additional settings under the gear icon

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 Basics

Who:	All Users
How Long:	1 Hour
Format:	Group Presentation or Upon Request
Timing:	2 Sessions Per Month
Prerequisites:	1001 - New Customer Orientation, MS Excel
Topics:	<ul style="list-style-type: none">✓ Import / Bulk Edit (Rules and use)✓ Items✓ Customers✓ Vendors✓ BOMS✓ Price Tiers✓ Sales Orders / Sales Receipts

1002.1 – Data Import Advanced Items

Who:	All Users
How Long:	45 Minutes
Format:	Group Presentation or Upon Request
Timing:	2 Sessions Per Month
Prerequisites:	1002 - Data Import Basics, MS Excel
Topics:	<ul style="list-style-type: none">✓ Review Import / Bulk Edit✓ Export by Location✓ Item Management<ul style="list-style-type: none">○ Quantity on Hand○ Value on Hand○ Managing multiple sheets✓ Bulk Inventory Adjustment



1004 – Serialized Inventory

Who:	Plus and Pro Users
How Long:	1 Hour
Format:	Group Presentation or Upon Request
Timing:	2 Sessions Per Month
Prerequisites:	1001 - New Customer Orientation
Topics:	<ul style="list-style-type: none">✓ Adding a new serial item✓ Serial item list✓ Purchasing and receiving serial items<ul style="list-style-type: none">○ Auto serial settings○ Warranties✓ Selling serial items✓ Adjusting serial items✓ Converting an existing item into serial tracked

1005 – Lot Inventory

Who:	Plus and Pro Users
How Long:	1 Hour
Format:	Group Presentation or Upon Request
Timing:	2 Sessions Per Month
Prerequisites:	1001 - New Customer Orientation
Topics:	<ul style="list-style-type: none">✓ Adding a new lot item✓ Lot item list✓ Purchasing and receiving lot items<ul style="list-style-type: none">○ Auto lot settings✓ Selling lot items✓ Adjusting lot items✓ Converting an existing item into lot tracked✓ 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
Prerequisites: 1001 - New Customer Orientation
Topics:
- ✓ Enabling
 - ✓ Defining UOMs
 - ✓ Applying UOMs to items (base and conversion)
 - ✓ 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)
 - ✓ Customers
 - ✓ Estimates
 - ✓ Sales Orders
 - Drop ship Sales Orders
 - ✓ Pick Tickets
 - ✓ Shipments
 - ✓ Invoices
 - ✓ Returns / RMAs
 - ✓ Sales Receipts
 - ✓ Sales reports

1011 – Purchasing Workflow

- Who: All Users
How Long: 1 Hour 15 Minutes
Format: Group Presentation or Upon Request
Timing: 2 Sessions Per Month
Topics:
- ✓ Vendors
 - ✓ Purchase Orders
 - ✓ Item Receipts
 - Landed costs
 - ✓ Drop ship POs
 - ✓ Return to Vendor
 - ✓ Purchasing reports



1013 – Form Templates

- Who: All Users
How Long: 1 Hour
Format: Group Presentation or Upon Request
Timing: 2 Sessions Per Month
Prerequisites: MS Word
Topics:
- ✓ Form Template List
 - ✓ Template Library
 - ✓ Editing a form template (rules and merge fields)
 - ✓ Using a form template
 - PDF
 - Email
 - AOP Rule

1015 – Custom Fields

- Who: All Users
How Long: 45 Minutes
Format: Group Presentation or Upon Request
Timing: 2 Sessions Per Month
Prerequisites: 1001 - New Customer Orientation
Topics:
- ✓ Defining a custom field (on SOS Inventory and QuickBooks Online)
 - ✓ Sharing custom fields
 - ✓ Use on edit pages and lists
 - ✓ How to attach to form templates
 - ✓ Reports and Exports
 - ✓ Alerts



1017 – Advanced Manufacturing

- Who: Pro Users
How Long: 1 Hour 45 Minutes
Format: Group Presentation or Upon Request
Timing: 2 Sessions Per Month
Prerequisites: 1001 - New Customer Orientation
Topics:
- ✓ Simple vs Complex Manufacturing
 - ✓ Labor items and Workers
 - ✓ Building Assemblies
 - ✓ Work In Progress
 - ✓ Work In Progress Report
 - ✓ Production Report
 - ✓ Process templates
 - ✓ Process transactions
 - ✓ Processing waste
 - ✓ Disassembly
 - ✓ Work Orders
 - Multi-level BOMs

1020 – Troubleshooting Sync Errors

- Who: All Users
How Long: 1 Hour
Format: Group Presentation or Upon Request
Timing: 2 Sessions Per Month
Prerequisites: 1001 - New Customer Orientation
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
- Prerequisites: 1000 - Starting SOS Inventory & Key Settings
1001 - New Customer Orientation
1010 - Sales Workflow
1011 - Purchasing Workflow
- Topics:
- ✓ Why reconcile
 - ✓ Understanding where errors may occur
 - ✓ Reconciliation process
 - ✓ Reconciliation tools
 - ✓ Other factors that can cause mismatch