



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](mailto: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](mailto:training@sosinventory.com)  
Subject: Request for Training – SOS Account 66120  
Please register the following people for the training sessions listed.  
1000 New Customer Orientation, 7/27/2024  
John Doe, [jdoh@mycompany.com](mailto:jdoh@mycompany.com)  
Jane Smith, [jsmith@mycompany.com](mailto: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 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 the SOS Inventory Training Department.

### 1000 – Starting SOS Inventory & 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 15 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 15 Minutes
Format:	Group Presentation
Timing:	2 Sessions Per Month
Prerequisites:	1001 - New Customer Orientation, MS Excel
Topics:	<ul style="list-style-type: none"><li>✓ Import / Bulk Edit (Rules and use)</li><li>✓ Items</li><li>✓ Customers</li><li>✓ Vendors</li><li>✓ BOMS</li><li>✓ Price Tiers</li><li>✓ Sales Orders / Sales Receipts</li></ul>

## 1002.1 – Data Import Advanced Items

Who:	All Users
How Long:	1 Hour
Format:	Group Presentation
Timing:	2 Sessions Per Month
Prerequisites:	1002 - Data Import Basics, MS Excel
Topics:	<ul style="list-style-type: none"><li>✓ Review Import / Bulk Edit</li><li>✓ Export by Location</li><li>✓ Item Management<ul style="list-style-type: none"><li>○ Quantity on Hand</li><li>○ Value on Hand</li><li>○ Managing multiple sheets</li></ul></li><li>✓ Bulk Inventory Adjustment</li></ul>

## 1003 – Item Creation and Management

Who:	All Users
How Long:	1 Hour
Format:	Group Presentation
Timing:	2 Sessions Per Week
Prerequisites:	1001 - New Customer Orientation
Topics:	<ul style="list-style-type: none"><li>✓ Defining an Item</li><li>✓ Item Action Menu</li><li>✓ Defining Price Tiers</li><li>✓ Vendor Item Catalog Entries</li><li>✓ Item List</li><li>✓ Transferring Items Between Locations</li><li>✓ Defining &amp; Using Categories and Variants</li><li>✓ Updating Quantities and Values with Inventory Adjustments</li><li>✓ Item Reports</li></ul>



## 1004 – Serialized Inventory

- Who: Plus and Pro Users  
How Long: 1 Hour  
Format: Group Presentation  
Timing: 2 Sessions Per Month  
Prerequisites: 1001 - New Customer Orientation  
Topics:
- ✓ Adding a new serial item
  - ✓ Serial item list
  - ✓ Purchasing and receiving serial items
    - Auto serial settings
    - Warranties
  - ✓ Selling serial items
  - ✓ Using serial items in production
  - ✓ 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  
Timing: 2 Sessions Per Month  
Prerequisites: 1001 - New Customer Orientation  
Topics:
- ✓ Adding a new lot item
  - ✓ Lot item list
  - ✓ Purchasing and receiving lot items
    - 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  
Timing: 2 Sessions Per Month  
Prerequisites: 1001 - New Customer Orientation  
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  
Timing: 2 Sessions Per Month  
Prerequisites: 1001 - New Customer Orientation  
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 30 Minutes  
Format: Group Presentation  
Timing: 2 Sessions Per Month  
Prerequisites: 1001 - New Customer Orientation  
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  
Timing: 2 Sessions Per Month  
Prerequisites: 1001 - New Customer Orientation, MS Word  
Topics:
- ✓ Form Template List
  - ✓ Template Library
  - ✓ Editing a form template (rules and merge fields)
  - ✓ Using a form template
    - PDF
    - Email
    - AOP Rules

## 1015 – Custom Fields

- Who: All Users  
How Long: 45 Minutes  
Format: Group Presentation  
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 30 Minutes  
Format: Group Presentation  
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  
Timing: 2 Sessions Per Month  
Prerequisites: 1000 – Starting SOS Inventory & Key Settings  
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
Timing:	2 Sessions Per Month
Prerequisites:	1000 - Starting SOS Inventory & Key Settings 1001 - New Customer Orientation 1010 - Sales Workflow 1011 - Purchasing Workflow
Topics:	<ul style="list-style-type: none"><li>✓ Why reconcile</li><li>✓ Understanding where errors may occur</li><li>✓ Reconciliation process</li><li>✓ Reconciliation tools</li><li>✓ Other factors that can cause mismatch</li></ul>

## 2000 – SOS Pay

Who:	All Users – <b><i>By Invite Only for Accounts Using SOS Pay</i></b>
How Long:	45 Minutes
Format:	Group Presentation
Timing:	2 Sessions Per Month
Prerequisites:	Addition of SOS Pay Module
Topics:	<ul style="list-style-type: none"><li>✓ What is SOS Pay</li><li>✓ Setting Up SOS Pay</li><li>✓ Payments List</li><li>✓ SOS Pay List</li><li>✓ Merchant Track</li><li>✓ Reporting</li></ul>