



The Wine Management System^{©1996-2008}

1 Day Training Agenda

Welcome to **The Wine Management System^{©1996-2008}** Training Agenda. With this document, we would like to outline what we hope to accomplish for the one day training session of WMS. It is important that we provide you with the best training, information and setup, so that WMS is the tool that makes your business the most efficient it can be.

Training Setup:

- 2 linked laptop PCs using the same WMS data displayed on overhead projector
- Assumptions of attendees:
 - WMS is installed on their office PC and have some experience with basic usage
 - Should bring Startup, Sales, Setup, Accounting and Reports Manuals provided
 - Interested in WMS as a new tool either for conversion or implementation
 - Bring a note book or pad

Morning 9:00- 10:30: Setup, Navigation & Sales

1. WMS Flowchart (Startup Guide - 3rd page) and its use.
2. Help and where to find it.
3. Review the **Setup Manual**: (page numbers are in brackets)
 - Chapter 2: Terminology (3), Switchboards (5), Backups (6), Navigation tools (8),
 - Chapter 3: Employees (17)
 - Chapter 4: System Preferences (21)
 - Chapter 5: Minor forms (36)
4. Review the **Sales Manual**
 - Chapter 3: Customer Information
 - Chapter 4: Invoice.
5. Function Keys: F4, F5, F6, F7, F8, F10, F11 & F12
6. Retail Only sales
7. Backup Procedure

Morning 10:30- 10:45: Coffee Break

- Coffee and Tea will be provided



The Wine Management System^{©1996-2008}

1 Day Training Agenda

Morning 10:45 – 12:00: Point of Sale, Production, and the F's

1. Stepping Through the Invoice (Sales, p29)
2. Play Store - you create sales transactions using the Invoice
 - You must add a new product on the fly
 - You must add a new customer from the Invoice
 - You must edit a customer's information
 - You must add multiple payments of different types and different customers
 - You must leave a note about a customer and identify the indicator
 - You must identify if this customer is Inactive and how to change to Active
 - You must sell and redeem a Gift Certificate
 - Your customer changes his mind after completing an Invoice, you must resolve
 - You must change the Make Date of an order after the Invoice has been completed
 - Schedule an appointment to bottle from the Invoice
 - Print (preview on-screen) a production label
3. Production Sequence Periods (Startup, p26)
4. Production Checklists (Startup, p30)
 - Daily tasks to do
 - Daily tasks to update
 - Single Order Status (Startup, p33)
5. Finds - what are the quickest way to locate:
 - A Customer by name or by phone number
 - An Invoice
6. Filters – tips and tricks for finding a single or group of:
 - Products
 - Customers
7. Printing from different forms for:
 - Labels
 - Envelopes
 - Production Labels
 - Reports



The Wine Management System^{©1996-2008}

1 Day Training Agenda

Afternoon 1:00 – 2:30: Point of Sale, the F's, and Help

1. Questions about stepping Through the Invoice (Sales, p29)
2. Pick a Function Key and explain the Navigation:
 - Use of every Function key, with the SHIFT and the CONTROL keys with examples
 - Follow a wine
3. On-Line Help and information available on the Administration Switchboard.

Afternoon 2:30 – 2:45: Coffee Break

Afternoon 2:45 – 4:30: Accounting and Purchasing

1. Accounting Procedures for:
 - Cash out at day's end
 - Weekly reports
 - Quarterly reports
2. Review the use of the Flowchart, Index diagram as a navigational tool within WMS.
3. Purchase Orders:
 - Rules of data entry
 - Output methods to the supplier
 - Receiving an order

Afternoon 4:30 –5:30: Question Period

1. Answers to your submitted questions
2. The integrated services of www.brewcheck.com and www.wms4wine.com
3. Distribute feedback questionnaire on Training Session.