

## GENERAL SESSIONS (120 MINUTES)

---

### VENDOR & PRODUCT

• Vendor Information • Reseller Information • Primary Product Name & Version • When Released • Supported Platforms & Technology • Key Industries • Sample Customers • Modules & 3rd Party Products Demonstrated

### NAVIGATION & USABILITY FEATURES

• Navigation • Integration with Desktop Products • Usability Features • Reporting Capabilities

### FINANCIALS

• **A/R:** Invoicing, Credit & Collections • **A/P:** Voucher Match, Check Writing, Discounts/Rebates, etc. • **Fixed Assets:** Asset Master, Depreciation, Disposal • **GL:** Structure, Integration with other systems, Cash Management, Reporting • Job Cost/Projects Accounting

### SALES OPERATIONS

• Sales Force Automation - **CRM:** Sales cycle & activity management, Lead to Opportunity to Quote to Order flow • **Order & Customer Service Management:** Create, Copy, update orders, credits/RMAs, blankets, templates, etc. • **Sale & Operations Planning:** Sale Planning & Forecasting • **Customer Self Service/e-Commerce:** e-commerce or customer portal

### INVENTORY

• **Inventory Management:** Vendor setup, Item setup, pricing, Physical Inventory/Cycle Count, Lot/Serial Number Control, Costing, Quality, Vendor Scorecards

### PROCUREMENT

• Requisitions, PO processing, blankets, templates, receipt routing

## INDUSTRY SPECIFIC SESSIONS (45-60 MINUTES)

---

### DISTRIBUTION

• Warehouse Management • Transportation Management • International Logistics • 3PL Management

### MANUFACTURING

• BOM & Routings • Requirements Planning • Shop Floor Control • Engineering Change Management • Costing • Quality Management • Shipping

### SERVICE OPERATIONS

• **Capital Asset Management:** Assets, Maintenance schedules • **Manage Service Requests:** Problem determination, knowledge base, Create and track issue • **Scheduling & Dispatch:** Assign appropriate available personnel • **Field Operations:** Time & materials entry • **Project Management:** Job Cost/Projects Accounting, Time Management