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 table of contents.

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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 66120
>
> Please register the following people for the training sessions listed.
>
> 1000 New Customer Orientation, 7/27/2024
>
> 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 customized training and will be determined by 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 – Administration & Key Settings

Who:	Administrators regardless of plan level primarily.
How Long:	1 Hour 30 Minutes
Format:	Group Presentation
Timing:	Recurring twice each week
Topics:	✓ QuickBooks Online Settings ✓ Connecting QuickBooks Online & SOS Inventory ✓ Information Imported from QuickBooks ✓ SOS Inventory Settings ✓ Adding & Managing Users ✓ Bulk Editing Process ✓ User Guide & Help Center

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:	✓ Operations Menus ✓ Dashboard & Calendar ✓ Inventory Overview ✓ Purchasing Overview ✓ Sales Overview ✓ Production Overview ✓ Reports ✓ Taskbar Menu ✓ User Guide & Help Center

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:	

- ✓ 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:	1 Hour
Format:	Group Presentation
Timing:	2 Sessions Per Month
Prerequisites:	1002 - Data Import Basics, MS Excel
Topics:	

- ✓ Review Import / Bulk Edit
- ✓ Export by Location
- ✓ Bins
- ✓ Serial and Lot Items
- ✓ Deleting Items in Bulk
- ✓ Item Management
- ✓ Quantity on Hand
- ✓ Value on Hand
- ✓ Managing multiple sheets
- ✓ Bulk Inventory Adjustment

1003 – Item Creation and Management

Who:	All Users
How Long:	1 Hour 15 Minutes
Format:	Group Presentation
Timing:	2 Sessions Per Week
Prerequisites:	1001 - New Customer Orientation
Topics:	

- ✓ Defining an Item
- ✓ Item Action Menu
- ✓ Item List
- ✓ Categories and Variants
- ✓ Adjustment and Transfer Transactions
- ✓ Price Tiers
- ✓ Vendor Item Catalog
- ✓ Item Reports

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 1003 – Item Creation and Management
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 1003 – Item Creation and Management
Topics:	✓ Adding a new lot item ✓ Lot item list ✓ Purchasing and receiving lot items o Auto lot settings ✓ Selling lot Items ✓ Adjusting lot items ✓ Converting an existing item into lot tracked ✓ Expirations and recalls

1006 – Assemblies and Item Groups

Who:	All Users
How Long:	1 Hour
Format:	Group Presentation
Timing:	2 Sessions Per Month
Prerequisites:	1001 - New Customer Orientation 1003 – Item Creation and Management
Topics:	✓ Difference between Assembly and Kit (Item Group) ✓ Defining an Assembly Item and it's Bill of Materials (BOM) ✓ Building an Assembly ✓ Using an Assembly in Transactions ✓ Adjusting Assemblies Stock Levels ✓ Defining a Kit (Item Group) and it's Bill of Materials (BOM) ✓ Using an Item Group in Transactions

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
- ✓ Sales Receipts
- ✓ Returns / RMAs
- ✓ Sales Reports

1011 – Purchasing Workflow

Who:	All Users
How Long:	1 Hour 15 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
- ✓ Barcode Template

1015 – Custom Fields

Who:	All Users
How Long:	1 Hour
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
- ✓ Reports and Exports
- ✓ How to attach to form templates
- ✓ 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 1003 – Item Creation and Management 1006 – Assemblies and Item Groups

Topics:

- ✓ Simple vs Complex Manufacturing
- ✓ Labor items and Workers
- ✓ Building Assemblies Review
- ✓ Work In Progress
    - Work Centers
- ✓ Work In Progress Report
- ✓ Production Report
- ✓ Process templates
- ✓ Process transactions
- ✓ Processing waste
- ✓ Disassembly
- ✓ Work Orders
    - Multi-level BOMs

1018 – Jobs (Starting in April)

Who:	Pro Users
How Long:	1 Hour
Format:	Group Presentation
Timing:	2 Sessions Per Month
Prerequisites:	1001 - New Customer Orientation
Topics:	✓ Creating a job ✓ Adding transactions to the job ✓ Job Dashboard ✓ Profit / Loss report

1020 – Troubleshooting Sync Errors

Who:	All Users
How Long:	1 Hour
Format:	Group Presentation
Timing:	2 Sessions Per Month
Prerequisites:	1000 – Administration & 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

1021 – Reporting

Who:	All Users
How Long:	1 Hour
Format:	Group Presentation
Timing:	2 Sessions Per Month
Prerequisites:	1001 - New Customer Orientation
Topics:	

- ✓ Report List
- ✓ Types of Reports
- ✓ Customizing Reports
- ✓ Scheduling Reports
- ✓ Most Popular Reports
  - Master Sales Report
  - Inventory Value
  - Inventory Stock Status
  - P&L Customers/Items
  - Master Purchase Report
  - Item Movement
  - Deleted Items
  - Purchase Variances
  - Backorder Report
- ✓ Export Data for Custom Reports

1022 – Reconciliation Process

Who:	All Users
How Long:	1 Hour
Format:	Group Presentation
Timing:	2 Sessions Per Month
Prerequisites:	1000 - Administration & Key Settings 1001 - New Customer Orientation 1010 - Sales Workflow 1011 - Purchasing Workflow 1020 – Troubleshooting Sync Errors
Topics:	

- ✓ Why reconcile
- ✓ Understanding where errors may occur
- ✓ Reconciliation process
- ✓ Reconciliation tools
- ✓ Other factors that can cause mismatch

1022.1 – Reconciliation Process for WIP Manufacturing (Starting in April)

Who:	Pro Users
How Long:	1 Hour
Format:	Group Presentation
Timing:	2 Sessions Per Month
Prerequisites:	1000 - Administration & Key Settings 1001 - New Customer Orientation 1010 - Sales Workflow 1011 - Purchasing Workflow 1017 – Advanced Manufacturing 1020 – Troubleshooting Sync Errors 1022 – Reconciliation Process

Topics:

- ✓ Review reconciliation process
- ✓ Work in Progress Report
  - Why needed
  - Using Inventory Item Export
  - Removing services and expenses

1026 – Reordering

Who:	All Users
How Long:	1 Hour
Format:	Group Presentation
Timing:	2 Sessions Per Month
Prerequisites:	1001 - New Customer Orientation 1003 – Item Creation and Management

Topics:

- ✓ Establishing Reorder Points and Max Stock Levels
- ✓ Reorder Calculation
- ✓ Pro Plan – Recalculate Reorder Points Option
- ✓ Reorder Report
  - How to configure and produce Purchase Orders
- ✓ Reorder List
  - Adding Items to it and Updating Info
  - Generating Purchase Orders

2000 – SOS Pay

Who:	All Users – ***By Invite Only for Accounts Using SOS Pay***
How Long:	1 Hour
Format:	Group Presentation
Timing:	2 Sessions Per Month
Prerequisites:	Addition of SOS Pay Module
Topics:	

- ✓ What is SOS Pay
- ✓ Setting Up SOS Pay
- ✓ Payments List
- ✓ Sales Receipts
- ✓ Sales Orders
- ✓ Invoices
    - Paying Online
- ✓ Customer Tools
- ✓ SOS Pay List
- ✓ Merchant Track
    - Reporting
    - Virtual Terminal