



***Training Schedule and
Acceptance Form***

Using the FACTS Training Schedule and Acceptance Form

Completed by:	Training Administrator and/or FACTS Implementation Consultant
Purpose:	To assist in planning for FACTS Training and to obtain the Customer's evaluation of the training including sign-off.
How it is used:	To develop your plan for FACTS Training. Complete the right-hand side of the form by entering the people to be trained and the topics on which they will be trained. Complete the left-hand side of the form to develop the training schedule and to track your hours.
When it is used:	During FACTS Training
Who uses it:	Local FACTS Office and Customers
File under:	Training and Testing/FACTS Training
Last revised:	05/01
File:	<p>Training Schedule Acceptance.exe</p> <p>This is a self-extracting zipped MS Word document and must be printed/viewed through MS Word. This file is located in the Software Solutions Nexus – Facts/Documentation and Education/PIA.</p> <p>Note: The Software Solutions Nexus is a private extranet and is available for local Facts personnel only.</p>

FACTS Training Schedule

Training Class	Train Date	Est. Hrs	Location	Comp Date	Actual Hrs.	Students									
						Project Leader									
Introduction to FACTS:															
Navigation (character & GUI)															
On-line Help															
Messages															
Sales Order Processing:															
Quotes															
Orders (entry, picking, hold)															
SO/PO Tie (N/S, Specials, etc.)															
Invoicing (confirmation, credits)															
Shipping (entry, inquiry, labels, UPS); Clippership, if purchased															
Counter Sales															
Recurring Sales Orders															
Payment & Deposit Handling															
Credit Card Handling (if client purchased ICVERIFY)															
Cash Drawer Handling															
Blanket Sales Orders															
Customer Returns System															
Contract Pricing															
Inquiries															
Reports and Prints															
End of Period Processing															
File Maintenances															

FACTS Training Schedule

						Students									
						Project Leader									
Training Class	Train Date	Est. Hrs	Location	Comp Date	Actual Hrs.										
General Ledger Posting Flow															
Other:															
Inventory Control:															
Adjustments															
Warehouse Transfers															
Costing and Pricing															
Electronic Price Updates															
Physical Inventory															
- Cycle Counting															
Inquiries															
Reports and Prints															
End of Period Processing															
File Maintenances															
General Ledger Posting Flow															
Other:															
Advanced Inventory Topics:															
Gordon Graham Restocking															

FACTS Training Schedule

						Students									
						Project Leader									
Training Class	Train Date	Est. Hrs	Location	Comp Date	Actual Hrs.										
Accounts Receivable:															
Invoice Processing															
Recurring Invoices															
Cash and Credit Applications															
Returned Checks															
Dunning Letters															
Inquiries															
Reports and Prints															
End of Period Processing															
File Maintenances															
General Ledger Posting Flow															
Other:															
Purchasing:															
Entry															
- PO/SO Tie (N/S, Specials, etc.)															
Receiving															
Invoicing Receiving															
Inquiries															
Reports and Prints															
End of Period Processing															
File Maintenances															
General Ledger Posting Flow															
Other:															

FACTS Training Schedule

						Students									
						Project Leader									
Training Class	Train Date	Est. Hrs	Location	Comp Date	Actual Hrs.										
Accounts Payable:															
Document Entry (entry, adjustments, chg.)															
Recurring Documents															
Payment and Hold Selections															
Checks (print, manual, void, etc.)															
Inquiries															
Reports and Prints															
End of Period Processing															
File Maintenances															
General Ledger Posting Flow															
Other:															
General Ledger:															
Journal Entry															
Recurring/Reversing/Allocating															
Financial Reports Setup															
Inquiries															
Reports and Prints															
End of Period Processing															
File Maintenances															
Other:															

FACTS Training Schedule

						Students									
						Project Leader									
Training Class	Train Date	Est. Hrs	Location	Comp Date	Actual Hrs.										
Sales Analysis:															
Posting															
Inquiries															
Reports and Prints															
End of Period Processing															
File Maintenances															
Other:															
System Administration:															
Initial Setup Parameters															
Menu Setup															
Security Setup															
System Installation															
Banking and Check System															
Inquiries															
End of Period Checklists															
File Maintenances															
Job Stream															
Office Automation															
Report Templates															
Search Preferences															
Inquiry Preferences															
Other:															

FACTS Training Schedule

						Students									
						Project Leader									
Training Class	Train Date	Est. Hrs	Location	Comp Date	Actual Hrs.										
Manufacturing Control:															
Bill of Materials															
Formulation															
Inquiries															
Reports and Prints															
End of Period Processing															
File Maintenances															
General Ledger Posting Flow															
Other:															
Job Cost:															
Job Estimation															
Job Entry															
Job Posting															
Job Invoicing															
Job Completion															
Inquiries															
Reports and Prints															
End of Period Processing															
File Maintenances															
General Ledger Posting Flow															
Other:															

FACTS Training Schedule

						Students									
						Project Leader									
Training Class	Train Date	Est. Hrs	Location	Comp Date	Actual Hrs.										
Payroll:															
Check Preparation															
Check Writing															
Inquiries															
Reports and Prints															
End of Period Processing															
File Maintenances															
General Ledger Posting Flow															
Other:															
TeleFacts:															
Telefacts															
Reports and Prints															
File Maintenances															
Other:															
Faxlink:															
Fax Directory															
Fax System Administration															

FACTS Training Schedule

[illegible]

FACTS Training Schedule

[illegible]

Training Acceptance

Initial FACTS training provides a good fundamental understanding of the system and its features and functions. Listed below is the FACTS application training that has been completed for your new installation. Please assess the training provided and add any additional comments you may have.

Application	Date Complete	Excellent	Above Average	Average	Below Average	N/A
Introduction to FACTS	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales Order Processing	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inventory Control	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advanced Inventory Topics	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accounts Receivable	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchasing	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accounts Payable	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General Ledger	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales Analysis	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
System Administration	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manufacturing Control	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Job Cost	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payroll	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Telefacts	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Faxlink	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments: _____

Local FACTS Office:	Customer:
_____	_____
Company name	Company name
_____	_____
Name	Name
_____	_____
Title	Title
_____	_____
Date	Date