



Core Training Schedule

October/November 2018

How Core Training Works

- Core Training is designed to train new and existing customers in the MOST IMPORTANT features you will need to get your system up and running.
- You can take the “Live Webinar” version or the recorded version of each session. There is no limit to the amount of employees you can have attend each session. Have one person attend all sessions (recommended), or you can have different managers attend each session.

Click on links in this document to register for sessions OR to view the videos.

- There are scheduled “Question and Answer” webinars and practice time between Sessions.
- There is “homework” that you will need to do between Training Sessions and ample time is provided for you to do so.
- The end goal is for you to have the training and procedures necessary to “Go Live” with your OnSite system.

Live Webinar Calendar

Click on the link below for a “Calendar View” of the Sessions presented in this document.

<https://tinyurl.com/y9saobdc>

Session 1 – Getting Started

Monday, October 8th @ 1pm

<https://attendee.gotowebinar.com/register/3602208294123651073>

Who Should Attend

- Business owner
- Implementation manager
- Anyone who is going to be an “administrator” of the system

What Will Be Covered

- Onboarding Steps
- Core Training Objectives
- Core Training Structure
- Training Toolbox
- Procedures
- OnSite Basics

Resources

- Video version of this webinar:
http://www.shopworkshelp.com/index.php?solution_id=1365
- Webinar on Procedure Workshop:
<http://www.shopworkshelp.com/index.php?action=artikel&cat=81&id=288>

Before The Next Session

- You should have your login to ShopWorks Central and be familiar with how to use it.
- You should be familiar with ShopWorks Help.
- Start thinking about “Procedures”. What procedures do you currently have? Who at your company organizes, creates and publishes procedures? What mechanisms do you have in place for creating procedures?
- You should be able to login to your system and be familiar with basic functions like navigation, doing “Finds”, and viewing record details.

Session 2 – Setting Up Your System – Part 1 of 2

Tuesday, October 9th @ 1pm

<https://attendee.gotowebinar.com/register/149457009395485953>

Who Should Attend

- Business owner
- Implementation manager
- Anyone who is going to be an “administrator” of the system

What Will Be Covered

- Employee Setup
- Company Setup
- Customer Setup
- User preferences

Resources

- Video version of this webinar:
http://www.shopworkshelp.com/index.php?solution_id=1366
- Video on Employee Setup:
<http://www.shopworkshelp.com/index.php?action=artikel&cat=86&id=349>
- Video on Company Setup:
<http://www.shopworkshelp.com/index.php?action=artikel&cat=86&id=350>
- Video on Important Concepts – Product Sizing:
<http://www.shopworkshelp.com/index.php?action=artikel&cat=3&id=305>
- Video on Customer Setup:
<http://www.shopworkshelp.com/index.php?action=artikel&cat=86&id=344>

Before The Next Session

- Setup a few employees.
- Do your Company Setup (at least the basics).
- Setup your User Preferences.
- Setup a few customers. What procedures might be needed?

Session 3 – Setting Up Your System – Part 2 of 2

Thursday, October 11th @ 1pm

<https://attendee.gotowebinar.com/register/3626399748958067457>

Who Should Attend

- Business owner
- Implementation manager
- Anyone who is going to be an “administrator” of the system

What Will Be Covered

- Design Types and Design Setup.
- Order Types.
- How Products Work.

Resources

- Video version of this webinar:
http://www.shopworkshelp.com/index.php?solution_id=1367
- Video on Important Concepts – Managing Designs:
<http://www.shopworkshelp.com/index.php?action=artikel&cat=3&id=308>
- Video on Important Concepts – Order Types:
<http://www.shopworkshelp.com/index.php?action=artikel&cat=3&id=307>
- Video on Product Setup:
<http://www.shopworkshelp.com/index.php?action=artikel&cat=69&id=345>

Before The Next Session

- Work on your Design Types.
- Work on your Order Types.
- Think about what Products will you need? Vendor downloads? Setup charges?

Question and Answer Session

Monday, October 15th @ 1pm

<https://attendee.gotowebinar.com/register/8971010322856313089>

Session 4 – Order Entry – Part 1 of 2

Tuesday, October 16th @ 1pm

<https://attendee.gotowebinar.com/register/6796143337766570753>

Who Should Attend

- Business owner
- Implementation manager
- Head of your “Order Entry” department. This may be an owner, sales manager or Customer Service Rep (CSR) manager.

What Will Be Covered

- Introduction to Order Entry
- Order Entry Basics.
- Order Entry Line Items.

Resources

- Video version of this webinar:
http://www.shopworkshelp.com/index.php?solution_id=1368
- Video on Order Entry For Administrators:
<http://www.shopworkshelp.com/index.php?action=artikel&cat=86&id=334>

Before The Next Session

- Think about the Order Types needed for your company. Set a few of them up.
- Think about the forms you will use for each Order Type?
- Will you separate different embellishment types onto separate orders or use a single order?
- Will salespeople enter their own orders or will this be done by a CSR?
- What procedures and training will you need to put in place for people who are entering Sales Orders?

Session 5 – Order Entry – Part 2 of 2

Wednesday, October 17th @ 1pm

<https://attendee.gotowebinar.com/register/6813545308299399425>

Who Should Attend

- Business owner
- Implementation manager
- Head of your “Order Entry” department. This may be an owner, sales manager or Customer Service Rep (CSR) manager.

What Will Be Covered

- Advanced Order Entry features.

Resources

- Video version of this webinar:
http://www.shopworkshelp.com/index.php?solution_id=1369

Before The Next Session

- Start thinking about video procedures you will need for Order Entry.
- Practice entering “real” orders into your system. NOTE: These can be deleted out before you “Go Live” so do not worry about mucking up your system.

Question and Answer Session

Friday, October 19th @ 1pm

<https://attendee.gotowebinar.com/register/3869101547626909697>

Session 6 – Purchasing and Inventory

Monday, October 22nd @ 1pm

<https://attendee.gotowebinar.com/register/3053114386235806721>

Who Should Attend

- Business owner
- Implementation manager
- Manager of your purchasing and/or inventory departments.

What Will Be Covered

- Purchase Order concepts.
- General PO.
- Single Order PO.
- Bulk Purchasing.
- Sub contract Purchasing.

Resources

- Video version of this webinar:
http://www.shopworkshelp.com/index.php?solution_id=1370
- Video on Order Entry For Administrators:
<http://www.shopworkshelp.com/index.php?action=artikel&cat=86&id=334>

Before The Next Session

- Think about what kind of PO's will you use at your company?
- Create PO's in the system.

Session 7 – Receiving

Tuesday, October 23rd @ 1pm

<https://attendee.gotowebinar.com/register/6741372265540665601>

Who Should Attend

- Business owner
- Implementation manager
- Manager of your receiving department.

What Will Be Covered

- Receiving concepts
- Receiving by PO
- Receiving by Order
- Inventory receiving

Resources

- Video version of this webinar:
http://www.shopworkshelp.com/index.php?solution_id=1371
- Video on Receiving:
<http://www.shopworkshelp.com/index.php?action=artikel&cat=86&id=327>

Before The Next Session

- Think about how will you “Receive” for your company? By Sales Order? By Purchase Order?
- What procedures will you need to implement in your Receiving area?
- Practice receiving a few Purchase Orders.

Question and Answer Session

Thursday, October 25th @ 1pm

<https://attendee.gotowebinar.com/register/8849397739754689281>

Session 8 – Production Setup & Management

Friday, October 26th @ 1pm

<https://attendee.gotowebinar.com/register/6386548868141114881>

Who Should Attend

- Business owner
- Implementation manager
- Manager of your production department.

What Will Be Covered

- Production Event/Calendar Setup
- Machine Setup
- Order Types/Events Interaction
- Production Reports
- Production Calendar

Resources

- Video version of this webinar:
http://www.shopworkshelp.com/index.php?solution_id=1372
- Video on Production Management:
<http://www.shopworkshelp.com/index.php?action=artikel&cat=86&id=354>

Before The Next Session

- What combination of Events, Machines and Order Types will you initially need?
- Who will be in charge of maintaining the Production Schedule?
- What procedures will you need for prioritizing Production Schedule?

Session 9 – Production Floor

Monday, October 29th @ 1pm

<https://attendee.gotowebinar.com/register/1981915182875139073>

Who Should Attend

- Business owner
- Implementation manager
- Manager of your production department.

What Will Be Covered

- Look/check on orders before production.
- Mark Orders as being completed.
- Logging time against a job.

Resources

- Video version of this webinar:
http://www.shopworkshelp.com/index.php?solution_id=1373
- Video on Production Management:
<http://www.shopworkshelp.com/index.php?action=artikel&cat=86&id=355>

Before The Next Session

- Think about who will update when Production is done on an Order and when?
- Will your production floor employees rely mostly on forms or screens for updated Order information?
- What procedures will need to exist for Order changes? How will Order change information be transferred to the production floor (and other departments)?

Question and Answer Session

Wednesday, October 31st @ 1pm

<https://attendee.gotowebinar.com/register/5568644158471150593>

Onboarding Session 10 – Art & Design Management

Thursday, November 1 @ 1pm

<https://attendee.gotowebinar.com/register/1733142980509464833>

Who Should Attend

- Business owner
- Implementation manager
- Manager of your art department.

What Will Be Covered

- Manage their Design production schedule.
- Mark Designs as being done.
- Log time against a Design.
- Update Design details.

Resources

- Video version of this webinar:
http://www.shopworkshelp.com/index.php?solution_id=1374
- Video on Art and Design Management:
<http://www.shopworkshelp.com/index.php?action=artikel&cat=86&id=332>

Before The Next Session

- Who will update when Production is done on an Order and when?
- Will your production floor employees rely mostly on forms or screens for updated Order information?
- What procedures will need to exist for Order changes? How will Order change information be transferred to the production floor (and other departments)?

Onboarding Session 11 – Shipping

Tuesday, November 6th @ 1pm

<https://attendee.gotowebinar.com/register/553449467277923073>

Who Should Attend

- Business owner
- Implementation manager
- Manager of your shipping department.

What Will Be Covered

- Research shipping details.
- Mark as being shipped.
- Integration with UPS/FedEx and other shipping systems.

Resources

- Video version of this webinar:
http://www.shopworkshelp.com/index.php?solution_id=1375
- Video on Shipping:
<http://www.shopworkshelp.com/index.php?action=artikel&cat=86&id=329>

Before The Next Session

- Think about who will handle Shipping for your company?
- What procedures will you need to implement in your Shipping department?

Session 12 – Accounting – Part 1 of 3

Wednesday, November 7th @ 1pm

<https://attendee.gotowebinar.com/register/4453025784859929601>

Who Should Attend

- Business owner
- Implementation manager
- Manager of your Accounting department.

What Will Be Covered

- Accounting system overview
- Accounting basics
- Chart Of Accounts
- Invoicing

Resources

- Video version of this webinar:
http://www.shopworkshelp.com/index.php?solution_id=1376
- Video on Chart Of Accounts:
<http://www.shopworkshelp.com/index.php?action=artikel&cat=86&id=342>
- Video on Invoicing:
<http://www.shopworkshelp.com/index.php?action=artikel&cat=86&id=333>

Before The Next Session

- At your company, will revenue and COG be driven off of the Order Type or line items or both?
- Will inventory be driven off of Company Setup or off of Inventory Levels? Will finished product be valued at a higher amount than the blank products that they are made of?
- Invoicing is a GREAT area for final review of an order before it is converted to an invoice. What is the "review checklist" for each order before invoicing? Does this need to vary by order type?
- A manager or owner should spot-check invoicing as part of a month end procedure.
- Do you want to have settings for not allowing invoicing until certain things have been done?

Session 13 – Accounting – Part 2 of 3

Thursday, November 8th @ 1pm

<https://attendee.gotowebinar.com/register/4370103916427968513>

Who Should Attend

- Business owner
- Implementation manager
- Manager of your Accounting department.

What Will Be Covered

- Customer Payments and Credit/Debit Memos
- Receivables management
- Bank Deposits

Resources

- Video version of this webinar:
http://www.shopworkshelp.com/index.php?solution_id=1377
- Video on Credit/Debit Memos:
<http://www.shopworkshelp.com/index.php?action=artikel&cat=86&id=337>
- Video on Receivables Management:
<http://www.shopworkshelp.com/index.php?action=artikel&cat=86&id=339>

Before The Next Session

- Consider implementing a procedure to cover the following:
 - Make sure the same person who is receiving payments is NOT also doing bank reconciliations...this is a recipe for FRAUD. Use small business "best practices" when considering the handling of checks and cash and consult with your accountant on simple procedures to discourage and check for fraud on a monthly basis.
 - Separate bank accounts for credit cards and your main operating account will make your life much easier especially with regard to bank reconciliations. This also allows you to separate funds and control user access to see only certain accounts in your system.

Question and Answer Session

Friday, November 9th @ 1pm

<https://attendee.gotowebinar.com/register/9143322486626829057>

Session 14 – Accounting – Part 3 of 3

Monday, November 12th @ 1pm

<https://attendee.gotowebinar.com/register/7921312069377082369>

Who Should Attend

- Business owner
- Implementation manager
- Manager of your Accounting department.

What Will Be Covered

- Vendor Setup
- Entering and paying Payables
- Using Credit Cards for transactions
- Writing Checks

Resources

- Video version of this webinar:
http://www.shopworkshelp.com/index.php?solution_id=1378
- Video on Payables:
<http://www.shopworkshelp.com/index.php?action=artikel&cat=86&id=335>

Before The Next Session

- Think about implementing some procedures that revolve around Payables:
 - How will you handle when payables do NOT match the PO. This is a common source of General Ledger errors.
 - Payables should be spot-checked as part of a month-end procedure by a manager/owner to identify any problems and then correct via training and procedures. Do NOT wait to find and correct these on a yearly basis.
 - Would paying bills be a good place to review the bills that are paid to verify that they are entered correctly?
- Think about who is going to pay and sign the bills? This should not be the person who entered them unless they are the owner of the company!

Question and Answer Session

Wednesday, November 14th @ 1pm

<https://attendee.gotowebinar.com/register/3672325250139067137>

Session 15 – Accounting Transition

Thursday, November 15th @ 1pm

<https://attendee.gotowebinar.com/register/3932289381363948289>

Who Should Attend

- Business owner
- Implementation manager
- Manager of your Accounting department.

What Will Be Covered

- How to transition from your current accounting system to OnSite.

Resources

- Video version of this webinar:
<http://www.shopworkshelp.com/index.php?action=artikel&cat=82&id=129>

FINAL Question and Answer Session

Friday, November 16th @ 1pm

<https://attendee.gotowebinar.com/register/2116262309650063873>