

# Infusion SILVER Training

The SILVER Level Two training course builds on the standard set up and transactions processed in the Bronze level one course. Users will gain a better understanding of the importance of system set up and the adoption of **Best Business Practice Policies** to help with efficiencies across the business.

This course looks more deeply at the common day to day sales transactions and understanding the sales and associated reporting. It also focuses on making the software work for you through use of Contact Management, Electronic Direct Marketing, Credit and Finance Management, and Supplier Price files.

The course takes a full day and is taught in a classroom environment with laptops, training material and exercises supplied.

## Contact Management

- Contact Management for Sales and Administration

## Customers and Electronic Marketing

- Credit Card Surcharge
- Finance Charges and Credit Management
- Electronic Marketing with SMS and Mailchimp
- Data Setup and Capture
- Mail Merge – Direct Marketing with MS Word

## Sales Analysis Reporting

- Customer Sales Analysis Reports
- Sales Analysis – Date Range
- How Can I Correct the Costs and Sales Rep on a Posted Invoice?
- Analysing Sales Trends over a Period
- Sales by Dual Date Range, Sales by Preferred Supplier
- Sales: Existing vs New Customers
- Product Sales Analysis
- Product Sales 12 Months
- Charts, Graphs and KPI Reports
- Why Should We Avoid Using a “Misc” or “N/S” Code?

## Daily Processing

- Trade-In Processing
- How does a Trade-In affect my Daily Sales?

- Deferred Payments - Customer Invoices
- Refunding a Customer who has Overpaid
- Goods Sold or Taken for Promotional Use
- Duplicated Customers – How to Avoid This
- Merging Customer Accounts
- Deferred Supplier Payments
- Bulk Supplier Payments

## Supplier Price Files

- Supplier Pricebooks
- Pricebook Setup
- Importing the Supplier Price File
- The Import Routine
- Updating the Supplier Price File
- Managing the Price File Once Imported
- Why Use Supplier Pricebooks?
- Using Products from the Price File
- Using the Pricebook for Purchase Orders.
- Updating the Supplier Pricebooks

## Product Pricing Management

- Latest vs Average Cost
- Mark-up vs Margin
- What is the difference between Margin and Mark-up?
- Desired Margin / Cost of Goods
- Reporting on Product Margins and Mark-ups
- Superseded Products
- Updating the Product Code
- Inactive Products
- Product Ratios e.g. chain and oil
- Reviewing Product Set Up Identifying Issues
- We have been offered a range of items to sell on Consignment. How do we set these up?
- How do we handle items supplied Free of Charge?

## Purchase Orders

- Purchase Order - Auto Order
- Purchase Order – Min Max
- Return Stock to Supplier

## Kitsets

- Invoice a Kitset
- Invoice with Product Buildup