



# Retail Pro V9 Transfer Training Checklist

Big Hairy Dog Retail Relationships

PLEASE COMPLETE INFORMATION BELOW

SYSOP Trainee: \_\_\_\_\_ Big Hairy Dog Trainer: \_\_\_\_\_

Company: \_\_\_\_\_

**Big Hairy Dog Fax #: 1-916-368-1411**

Email: tech@bighairydog.com

Estimated training time: 40-50 hrs single store      50+ hrs for multi stores

## Training #1: Introduction & Preferences

### Intro

- 1. Software starts the date of the order, not go live date -----
- 2. S/A is already a ticking clock (Please initial on Line) -----
- 3. S/A Expires -----
- 4. Identify Sysop -----
- 5. Review Hardware -----
- 6. Check for or execute blank backup -----
- 7. Manuals on board and PDFs -----
- 8. SPEED of local install versus a client. -----
- 9. Website tour – incl. training, You Tube videos, chatroom, Social Media -----
- 10. Show our Videos -----

### System Preferences

- 11. Enable ALU Sequencing -----
- 12. Item/Style SID Generation -----
- 13. Global Preferences -----
- 14. Local Preferences -----
  - a. Customers -----
  - b. Documents -----
  - c. Employees -----
  - d. Merchandise -----
  - e. Point of Sale -----
  - f. CC Types Mapped -----
  - g. Token setting (9.4 Only) -----
  - h. Purchasing -----
  - i. Reports, Store, Systems, Taxes -----
  - j. Transfers -----
- 15. User Preferences -----

### Database Preparation

- 16. Execute backup after preferences -----
- 17. Schedule Backup -----
- 18. Practice Mode -----

### Employee Management

- 19. Employees -----
- 20. Groups -----
- 21. Time Shifts/Commissions/Sales Targets -----
- 22. Create Tech User for Big Hairy Dog Tech Support -----

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## Training #2: Merchandise

### Departments

- 1. Final Copy Reviewed -----
- 2. DCS Entered -----

### Vendors

- 3. Fields & their uses (i.e., Terms, Notes, UDF) -----
- 4. History/Find -----

### Inventory Entry

- 5. Form vs. List -----
- 6. Item View -----
- 7. Style View
  - a. What makes a Style (What 3 fields create a style) -----
  - b. Benefits of using a Style -----
  - c. Error Messages (i.e., Join Style?, Duplicate Attributes) -----
  - d. Grid Values -----
  - e. Grid vs List (SRO in list?) -----
  - f. Managing Scales -----
- 8. Screen Designs -----
- 9. Copy & Paste -----
- 10. Searching
  - g. Quick Filter boxes -----
  - h. Filtered View -----
- 11. Tag Printer – Setup & Test Design Sizes -----
- 12. Tag Designs (Test Barcode) -----
- 13. Inventory Count Sheet -----

### Advanced Inventory

- 14. Find & Replace (Dangerous) -----
- 15. Pricing Method -----
- 16. Promo Pricing -----
- 17. Price Levels (i.e., Qty Pricing, Customer Defined Pricing) -----
- 18. Multi-Vendor/UPC -----
- 19. Package/Kit -----
- 20. Serial Number Tracking -----
- 21. Lot Number Tracking -----
- 22. Non-Inventory Items -----
- 23. Changing Location (multi-store) -----
- 24. Marking an item Inactive -----
- 25. Recalculate SRO -----
- 26. Update Delta for KPIs -----
- 27. REPORTS – Inventory On Hand Summary -----
- 28. Item history -----
- 29. Profiles (Statistics) -----

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## Training #3: Purchasing/Receiving

### Purchase Orders

- 1. Entering New Items -----
- 2. Reordering Existing Items -----
- 3. Allocation (optional) -----
- 4. Generate TO or ASN from PO (optional) -----
- 5. Changing PO# -----
- 6. Changing Date Fields (+/-/t shortcuts) -----
- 7. Entering Instructions -----
- 8. Emailing a PO -----
- 9. Managing PO's -----
- 10. Completed Screen Designs -----
- 11. Completed Doc Designs -----

### Vouchers

- 12. Receiving from a PO -----
- 13. Accessing PO List -----
- 14. PO Items -----
- 15. Receive Due -----
- 16. Entering Invoice # and Date (Voucher Reconciliation) -----
- 17. Former Vouchers (reverse vs. copy/return/copy/correct) -----
- 18. ASN Vouchers (optional) -----
- 19. Receiving Without a PO -----
- 20. Return Vouchers -----
- 21. Spreading Freight or Discounts -----
- 22. Completed Screen Designs -----
- 23. Completed Doc Designs -----
- 24. REPORTS – PO/Voucher Journal -----
- 25. REPORTS – PO/Voucher Summary -----

Initial: \_\_\_\_\_ Date: \_\_\_\_\_

## Training #4: Transfers (optional)

### Slips

- 1. Transfer Out Slips -----
- 2. System Preferences (Auto-verify vs ASN) -----
- 3. ASN Vouchers to Receive In (mix with Voucher History) -----
- 4. Former Slips (reverse vs. copy/return/copy/correct) -----
- 5. Transfer Orders -----
- 6. Generating Slips -----
- 7. Trans verification -----
- 8. Completed Screen Designs -----
- 9. Completed Doc Designs -----
- 10. REPORTS – Transfer Journal -----

Initial: \_\_\_\_\_ Date: \_\_\_\_\_



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## Training #5: Memos

### Adjustment Memos

- 1. Types of Memos -----
- 2. Creating Memos – Auto vs. Manual -----
- 3. Former Memos (Reverse and Update) -----
- 4. Completed Screen Designs -----
- 5. Completed Doc Designs -----
- 6. REPORTS – Adjustment Summaries -----

Initial: \_\_\_\_\_ Date: \_\_\_\_\_

## Training #6: Customers

- 7. Adding Customers -----
- 8. Customers History -----
- 9. Customer Segments -----
- 10. Customer Binning and Scoring -----

Initial: \_\_\_\_\_ Date: \_\_\_\_\_

## Training #7: Point of Sale

### Receipts

- 1. Creating a Sales Receipt -----
- 2. Tendering a Sales Receipt (Including Split Tender) -----
- 3. Item Search -----
- 4. Returns (negative quantities or receipt type) -----
- 5. Item Return Filtering and Selecting Items to Return -----
- 6. Discounts (Item, Global, Qty-based, Price Levels) -----
- 7. Tax/Shipping -----
- 8. Item Search -----
- 9. Former Receipts (Reverse vs. Copy/Return/Copy/Correct) -----
- 10. Completed Screen Designs -----
- 11. Completed Doc Designs -----

### Credit Card Integration (optional)

- 12. Status -----

### Miscellaneous

- 13. Disbursements -----
- 14. Check In/Out (Time clock) -----

### POS Reconciliation

- 15. X/Z Out -----
- 16. Open/Close Drawer -----



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### Sales Reports

- 17. Sales Journals -----
- 18. Sales Summaries -----
- 19. Employee Performance Reports -----

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## Training #8: Sales Orders

### Sales Orders

- 1. Types of Sales Orders -----
- 2. Creating a Sales Order -----
- 3. SO Deposits -----
- 4. Generating SO From a Receipt -----
- 5. Record Sale -----
- 6. Completing an SO from Receipt -----
- 7. Inactivating or Deleting -----
- 8. Multi-Store Sales Orders (*optional*) -----
- 9. Completed Screen Designs -----
- 10. Completed Doc Designs -----
- 11. REPORTS – Fulfillment & Summaries -----
- 12. REPORTS – Journals -----

Initial: \_\_\_\_\_ Date: \_\_\_\_\_

## Training #9: Preferences and Designer Tools

### Designer Tools

- 13. Menu Designer -----
- 14. Page Manager -----
- 15. Page Designer -----
- 16. Doc Designer -----

### Workstation Preference

- 17. Printing Defaults -----
- 18. Peripherals Setup -----

Initial: \_\_\_\_\_ Date: \_\_\_\_\_



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## Training #10: Regular Maintenance

### Database Maintenance

- 1. Backups -----
- 2. Virus Scan/Disk Maintenance -----
- 3. Scheduler -----
- 4. Initialize Inventory Periodically -----

Initial: \_\_\_\_\_ Date: \_\_\_\_\_

## Training #11: ECM

### Polling

- 1. Overview (Process Out, Exchange, Process In) -----
- 2. Setup Station File – Main vs. Remote -----
- 3. Initializing vs. Regenerating -----
- 4. Polling Log -----
- 5. Technical Details of Polling (*as required*) -----
- 6. Pending Pos (optional) -----
- 7. Pending Vouchers (optional) -----
- 8. Movelist -----

Initial: \_\_\_\_\_ Date: \_\_\_\_\_

## Training #12: Report Designer

### Overview

- 1. Report Types -----
- 2. Reports Options -----
- 3. Filters -----
- 4. Export from Preview (to Excel or PDF) -----
- 5. Copy and Register Existing Report -----
- 6. Export/Import Reports (optional) -----
- 7. Auto Emailing reports -----

### Crystal Reports (*optional*)

- 8. Adding Fields -----
- 9. Moving & Aligning fields -----
- 10. Grouping vs Sorting -----
- 11. Inserting Subtotals -----
- 12. Formulas -----
- 13. Record Selector -----

Initial: \_\_\_\_\_ Date: \_\_\_\_\_



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## Training #13: Advanced Operations

### Physical Inventory (not covered under FREE Refresher)

- 1. Start a PI -----
- 2. Setting Up Zones -----
  - Printing Inventory Count Sheets for Manual Count -----
  - Using Palm/PT/Janam -----
  - Test all tag sizes they use – Multiple times -----
- 3. Merging and Reviewing Discrepancy -----
- 4. Updating the PI -----

### Utilities

- 1. Price Manager -----
- 2. Rpro Promo -----
- 3. Auto Min/Max (or Manual) -----
- 4. Auto PO -----
- 5. Best Replenishment -----

### Technician's Toolkit

- 1. Monitoring & Tuning (Index/Tune) -----
- 2. Backup & Recovery -----
- 3. Managing Schema Objects >SQL Shell -----
- 4. Data Maintenance -----
  - Archive/Purge -----
  - Inventory -----
  - Miscellaneous -----
  - Customer Merge and Purge -----

Initial: \_\_\_\_\_ Date: \_\_\_\_\_

Print

Name: \_\_\_\_\_

Trainee

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Trainer

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Email back to Service Group at [service@bighairydog.com](mailto:service@bighairydog.com)**

**Free refresher training is ONLY for the fully trained sysop who has completed and submitted training checklist.**

It Does NOT Cover:

- PI training
- Creation of new Reports or Doc Designs
- Editing or Modifications to existing Reports or Doc Designs
- Tech Support
- Troubleshooting
- Training anyone other than the sysop that signed the training checklist
- Any customization (Plug In)