



# Retail Pro Prism Training Checklist

Big Hairy Dog Retail Relationships

PLEASE COMPLETE INFORMATION BELOW

**SYSOP Trainee:** \_\_\_\_\_ **BHD Trainer:** \_\_\_\_\_

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

**BHD 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. S/A is based on order date, not go live date \_\_\_\_\_
- 2. S/A is already a ticking clock (Please initial) \_\_\_\_\_
- 3. S/A Expires \_\_\_\_\_
- 4. Identify Sysop \_\_\_\_\_
- 5. Review Hardware \_\_\_\_\_
- 6. Check for or execute blank backup \_\_\_\_\_
- 7. Manuals on board and PDFs \_\_\_\_\_
- 8. Tour Website – Incl Twitter \_\_\_\_\_

### System Preferences

- 9. Preferences and Settings \_\_\_\_\_
  - a. Node Selection \_\_\_\_\_
  - b. Themes & Layouts \_\_\_\_\_
  - c. Grid Formats \_\_\_\_\_
  - d. Language & Locale \_\_\_\_\_
  - e. Transactions \_\_\_\_\_
  - f. Transactions > Promotions \_\_\_\_\_
  - g. Transfers \_\_\_\_\_
  - h. Purchasing \_\_\_\_\_
  - i. Sequencing \_\_\_\_\_
  - j. Reporting \_\_\_\_\_
  - k. Customers \_\_\_\_\_
  - l. Taxes \_\_\_\_\_
  - m. Employee \_\_\_\_\_
  - n. Hardware \_\_\_\_\_
  - o. Touch Menu \_\_\_\_\_
  - p. Customizations (Optional) \_\_\_\_\_
  - q. Permissions (Required) \_\_\_\_\_
- 10. Data Replication \_\_\_\_\_
  - a. V9 Publisher \_\_\_\_\_
  - b. Prism Publisher \_\_\_\_\_

### Database Preparation

- 11. Execute backup after preferences (RPRO TTK) \_\_\_\_\_
- 12. Schedule Backup \_\_\_\_\_

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## Training #2: Store Operations Merchandise

### Departments

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

### Vendors

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

### Merchandise

- 5. Searching using parameters (uncheck Specific Search) \_\_\_\_\_
- 6. Item Details \_\_\_\_\_
  - a. What defines a style in RPRO \_\_\_\_\_
  - b. Details Tab \_\_\_\_\_
  - c. Style Tab (Misc Tab in Details) \_\_\_\_\_
  - d. Packages/Kits Tab \_\_\_\_\_
  - e. Price/Cost Tab \_\_\_\_\_
  - f. Purchasing Tab \_\_\_\_\_
  - g. Next / Previous \_\_\_\_\_
- 7. Print Tags \_\_\_\_\_
- 8. Options \_\_\_\_\_
- 9. Screen Design \_\_\_\_\_

### Physical Inventory (Simple Mode Only 09/27/2016)

- 10. Start a PI
- 11. Viewing PI Sheet
  - Printing Inventory Count Sheets for Manual Count
  - Upload counts using Palm/PT/Janam
- 12. Reviewing Discrepancies
- 13. Send to V9
- 14. Updating the PI

## Training #3: Store Operations Purchasing/Receiving

### Purchase Orders

- 1. Reordering Existing Items \_\_\_\_\_
- 2. Changing PO# \_\_\_\_\_
- 3. Vendor Code \_\_\_\_\_
- 4. Changing Date Fields \_\_\_\_\_
- 5. Purchase Order Details \_\_\_\_\_
  - a. General \_\_\_\_\_
  - b. Vendor \_\_\_\_\_
  - c. Instructions \_\_\_\_\_
  - d. Notes \_\_\_\_\_
- 6. Bottom Menu \_\_\_\_\_
- 7. Print/Emailing a PO \_\_\_\_\_



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- 8. Purchase Order Lookup \_\_\_\_\_
- 9. Pending Purchase Orders \_\_\_\_\_
- 10. Completed Doc Designs \_\_\_\_\_

### Receiving

- 11. New Voucher \_\_\_\_\_
  - a. Receiving from a PO \_\_\_\_\_
  - b. Accessing PO List \_\_\_\_\_
  - c. PO Items \_\_\_\_\_
  - d. Receive Due \_\_\_\_\_
  - e. Voucher Details \_\_\_\_\_
    - General Tab (Freight, Discounts, Spreading) \_\_\_\_\_
    - Vendor Tab \_\_\_\_\_
    - Comments \_\_\_\_\_
  - f. Receiving without a PO (Scanning vs selecting) \_\_\_\_\_
  - g. Return Vouchers \_\_\_\_\_
- 12. Voucher Lookup \_\_\_\_\_
  - a. Former Vouchers (copy/return/copy/correct) \_\_\_\_\_
  - b. Voucher Reconciliation \_\_\_\_\_
- 13. New ASN (Voucher) / ASN Lookup \_\_\_\_\_
- 14. Pending Vouchers \_\_\_\_\_
- 15. Pending ASN's \_\_\_\_\_
- 16. Batch Receiving (ASN's) \_\_\_\_\_
- 17. Vendor Invoices (Old Stock Audit) \_\_\_\_\_
- 18. Completed Doc Designs \_\_\_\_\_

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

## Training #4: Store Operations Transfers (*optional*)

### Slips

- 1. New Transfer Slip \_\_\_\_\_
  - a. Slip Details \_\_\_\_\_
  - b. Bottom Menu \_\_\_\_\_
- 2. Transfer Slip Lookup \_\_\_\_\_
- 3. Former Slips (copy/return/copy/correct) \_\_\_\_\_
- 4. Completed Screen Designs \_\_\_\_\_
- 5. Completed Doc Designs \_\_\_\_\_

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## Training #7: Point of Sale – Point of Sale Menu

### New Transaction

- 1. Creating a Sales Receipt \_\_\_\_\_
  - a. Item Search vs Scanning \_\_\_\_\_
  - b. Item: Details \_\_\_\_\_
  - c. Item Type (Return item/Order item/Send item) \_\_\_\_\_
  - d. Discounts/Void/Remove/Qtys \_\_\_\_\_
- 2. Adding a Customer \_\_\_\_\_
  - a. New \_\_\_\_\_
  - b. Searching \_\_\_\_\_
- 3. Transaction Details \_\_\_\_\_
  - a. General Tab \_\_\_\_\_
  - b. Fees Tab \_\_\_\_\_
  - c. Shipping Tab \_\_\_\_\_
  - d. Associate Tab \_\_\_\_\_
  - e. Price Levels Tab \_\_\_\_\_
  - f. Discounts Tab \_\_\_\_\_
  - g. Taxes Tab \_\_\_\_\_
  - h. Notes Tab \_\_\_\_\_
- 4. Order Details \_\_\_\_\_
  - a. Fulfill Order \_\_\_\_\_
  - b. Order History \_\_\_\_\_
  - c. Take Deposit \_\_\_\_\_
  - d. Deposit History \_\_\_\_\_
  - e. Close Order \_\_\_\_\_
- 5. Coupons (Part of Promotions)
- 6. Tendering a Sales Receipt (Including Split Tender)
- 7. Returns (receipt type)
- 8. Completed Screen Modifications (as needed)
- 9. Completed Doc Designs

### Credit Card Integration (optional)

- 10. Status \_\_\_\_\_

### Transaction Lookup

- 11. Searching
- 12. View former receipt
- 13. Former Receipts (Copy/Return/Copy/Correct)
- 14. Bottom Menu

### Pending Transactions

- 15. Searching
- 16. Viewing
- 17. Discarding

### Disbursements

- 18. New
- 19. Types
- 20. Disbursements Lookup Searching
- 21. Disbursements Lookup Viewing



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## Miscellaneous

- 22. Checkin / Out \_\_\_\_\_
- 23. Time clock \_\_\_\_\_
- 24. Open Drawer \_\_\_\_\_
- 25. Change Till/Drawer \_\_\_\_\_

## Promotions

- 26. New \_\_\_\_\_
- 27. Types \_\_\_\_\_
- 28. Scenarios \_\_\_\_\_

## Customers

- 29. New Customer (fields) \_\_\_\_\_
- 30. New Customer - New transaction \_\_\_\_\_
- 31. Customer Lookup (searching/Selecting) \_\_\_\_\_
- 32. Contact Information Tab \_\_\_\_\_
- 33. Customer Profile Tab \_\_\_\_\_
- 34. Customer History Tab \_\_\_\_\_
- 35. Credit Details Tab \_\_\_\_\_
- 36. Customer Loyalty Tab (optional) \_\_\_\_\_
- 37. Miscellaneius Tab \_\_\_\_\_
- 38. Bottom Menu \_\_\_\_\_

## XZ-Out

- 39. X Out \_\_\_\_\_
- 40. Z Out (Open/Close) \_\_\_\_\_
- 41. Z-Out Lookup \_\_\_\_\_

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## Training #9: Preferences and Designer Tools

### Designer Tools

- 1. Doc Designer \_\_\_\_\_

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## Training #10: Regular Maintenance

### Database Maintenance

- 1. Backups \_\_\_\_\_
- 2. Virus Scan/Disk Maintenance \_\_\_\_\_

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## Training #11: ECM (Optional)

### 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 \_\_\_\_\_

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

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

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

Please FAX back to our Customer Service group at **916.368.1411**

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  
Creation of SQL Based Reports  
Tech Support  
Training new employees or other staff members