KARMAK™

TRAINING OPTIONS

All webinars billed at $75/hour unless otherwise noted

0022118

COMPANY-WIDE

Common Forms & Functionality Webinar *(1 hour)*

For: All users

Our growing line of products offers many new and advanced features to assist your entire organization. We'll show you how to navigate the system's windows, menus, and forms to make everyday tasks more efficient. Learn how features such as Validated Text Lookup, Repeat Entry Logic, and Control Sequence Keys can help save time and reduce errors.

Local Purchase Orders Webinar *(1 hour)*

For: Sales Management users, Service Writers, Parts Counter personnel, Accounting personnel, Lease/Rental users

Local Purchase Orders (LPOs) help you effectively track unit costs in Sales Management. Learn how to create, reference, and process LPOs, as well as how to close, void, and look up LPOs.

Scheduling Reports with Job Scheduler Webinar *(1 hour)*

For: Managers, General Managers, Directors, Dealer Principals, IT

Report Job Scheduler allows you to pick and choose which reports to run. Whether it is daily, weekly, bi-weekly, monthly, or annually, we can schedule reports to run accordingly. We will also discuss how to set up memorized parameters and printer characteristics in order for Job Scheduler to work most effectively. Report Job Scheduler allows you to automatically receive reports via either email or a print out.

Unit Occurrences Webinar *(1 hour)*

For: Sales, Service, and Lease/Rental Users who set up and search Units

When using Sales, Lease/Rental and/or Service, your units will change ownership several times in their lifetime. Karmak classifies this change of ownership as an occurrence. Learn to search, view, and maintain both current and previous occurrences.

FRW (Fusion Report Writer) Webinar *(1 hour)*

For: Managers, General Managers, Directors, Dealer Principals, IT

Fusion Report Writer allows you to create custom reports, which can be exported or scheduled to run at the interval of your choice. Learn how to create various analyses, charts, dashboards and reports using real-time information from Fusion. We will also cover how to create reports using multiple visuals and scheduling those reports to run automatically.

Alerts Webinar *(1 hour)*

For: All Users

Learn how to set up an alert or message for specific instances within Fusion; for example, if you want a customer or Service Manager notified automatically when their repair order is invoiced, when an invoice is posted for more than a specific dollar amount, and many others. We will cover how to select conditions desired for the alert to be sent and how to set up the notification that is sent.

ACCOUNTING

Sales Tax Reconciliation Webinar *(1 hour)*

For: Accounting Personnel

Review state sales tax procedures, including month-end reports, line item transactions requests, and reconciling sales tax reports. Discuss tax adjustments, environmental handling charges, and tax options for miscellaneous charges.

Cash Reconciliation Webinar *(1 hour)*

For: Controllers, Office Managers, Accounts Receivable Personnel

Is your cash drawer short? Is it over? Having trouble figuring out why? We'll discuss cash invoice options and receipt reports generated. We'll also cover the general ledger journal entries to zero out cash-on-hand and record the bank deposit entries.

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ACCOUNTING CONT.

Accounting Research Tools Webinar *(1 hour)*

For: Controllers, Office Managers, Accounting Managers, Accounting Personnel

Ever wonder how to make sure all payments received on an account were deposited into the bank account correctly? Discover the flexibility available in researching general ledger updates. Want an easy way to track expensed invoices, to check cash invoices from a specific day, or to reconcile tax collected? Want to know why you have low profit percentage on a particular day? We will show you the tools to use to efficiently research accounting items that can directly affect your bottom line.

Accounts Payable Setup, Management & Payment Processing Webinar *(1 hour)*

For: Controllers, Accounts Payable Personnel

Review setting up vendor terms and vendor records, maintaining accounts payable invoices and posting standard payable invoices. Vendor statement checking and the aged invoice analysis report will also be discussed. Walk through selecting and maintaining invoices, check processing, and check voiding.

Accounts Receivable Introduction & Program Review Webinar *(1 hour)*

For: Controllers, Accounts Receivable Personnel

Get an overview of the Accounts Receivable process as we dive into the daily receivable procedural flow. Review maintenance programs and learn to effectively use the reporting tools to pull and customize data to leverage the wealth of information within the Karmak business system. Learn how this indispensable tool provides valuable information for your business.

Accounts Receivable Display & Processing Webinar *(1 hour)*

For: Controllers, Accounts Receivable Personnel

For those who have attended the Accounts Receivable Introduction & Program Review Webinar, this session provides a deeper understanding of display programs including display invoice, customer account activity display, and reprinting an invoice. Review processing programs such as customer receipt entry and refund check entry. Get help with aged invoice request table maintenance and options for requesting month-end statements.

Fiscal Year-End Checklist Webinar *(1½ hours)*

For: Owners/Presidents, Dealer Principals, General Managers, Parts Managers, Controllers

Learn the key steps for a smooth year-end transition. Review how fiscal year-end inventory data is captured, where that data is held, how it affects the system, and how it can be used. We will also cover year-end reports, budgets, 1099s, inactive customers, and customer sales history for current and prior years.

Inventory Reconciliation Webinar *(1 hour)*

For: Controllers, Accounting Managers, General Managers, Inventory Control Managers, Parts Managers, Office Managers

Frustrated with large inventory write-offs each year? Learn how to reconcile physical to general ledger inventory every month and avoid those expensive entries. Learn to catch errors on a monthly basis instead of researching entries from an entire year. We will review parameter settings to make sure your system is set up to maximize control and reporting capability. We will also discuss timing differences in updating physical and general ledger inventories and the reports to use to reconcile inventories.

Labor Reconciliation Webinar *(1 hour)*

For: General Managers, Controllers, Accounting Managers, Office Managers, Service Managers

Reconciling labor work-in-process (WIP) or labor inventory to the General Ledger balance can be a daunting task. Learn how labor costs are determined, what reports are helpful, and what parameters can be changed to post costs differently in order to make the reconciliation easier. This session will help you determine what data you need to gather and interpret for reconciliation purposes.

Accounting: Fusion Accounting Reports *(1 hour)*

For: Controllers, Accounting Managers

We will review reporting within the Accounting module, learn to set up parameters for different views of the statements to easily recognize your company's revenues and expenses, and discuss zero-balance G/L accounts and viewing non-department records in the parameters screen. With this session, we'll look at additional reporting options to find the actionable data that you need in your system.

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ACCOUNTING CONT.

Notes Payable & Fixed Assets Webinar *(1 hour)*

For: Controllers, Office Managers, Accounting Personnel

This webinar will cover setup and processing of Fixed Assets and Notes Payable.

Controller/Office Manager Workshop *(2 days Onsite or In-house)*

For: Controllers, Office Managers, Accounting Personnel

An in-depth review of the accounting responsibilities on the system. Learn about general ledger posting flow, schedules, journals, bank reconciliation, inventory reconciliation, and labor reconciliation. There will also be an overview of the accounts receivable and accounts payable procedures.

**Price will be quoted based on need.*

Account Allocations Webinar *(1 hour)*

For: Controllers, Accounting Managers

This class will explain the feature which allows users to allocate G/L account distributions across branches and departments.

Accounting Workshop *(2 days Onsite or In-house)*

For: Accounting Personnel

This class is for personnel who need to learn how to use the system. We will cover the basics of accounting on the system. Learn how to research and correct any posting errors, and set up and maintain customer accounts and vendor records. We will review accounts payable and accounts receivable procedures. We will also discuss accounting reports and accounting issues specific to the business system.

**Price will be quoted based on need.*

SALES

Unit Inventory Webinar *(1½ hours)*

For: Sales Administrators, Sales Personnel

Learn how to create and maintain units in Sales Management. We will cover unit search, maintenance, and display, as well as how to receive an invoice for one or multiple units. We will cover all fields on the Unit Maintenance screen, as well as discuss available reporting options to track your unit inventory. This class is excellent for a new hire or as a refresher.

Sales Management Deal Forms Processing Webinar *(1 hour)*

For: Sales Management Users

Learn to process municipality, state, OEM, and internal deal forms for smoother sales transactions. We'll cover available documents, deal form field controls, automatic and manual form selection, form field entry, and deal packet forms processing procedures.

Sales Management Financing Webinar *(1 hour)*

For: Sales Coordinators, Sales Managers, Sales Administrators, General Managers

Learn how to set up finance lenders and how to apply financing information to deals. We will cover rate creation through the deal and how the financing will be applied through deal processing.

Sales Management Training *(2 days Onsite or In-house)*

For: Sales Coordinators, Sales Managers, Deal Processors, Branch Managers, General Managers

Join us for an in-depth look at Sales Management. We'll cover deal processing with special emphasis on deals, deal packets, deal forms processing, and accounting review. Learn how to calculate and use commissions, as well as how to use the after-sales expense and after-sales commissions. We will show you how to set up customers, create and maintain unit records, and create and issue local purchase orders (LPOs). We will also cover the basic functionality of standard reports, as well as an overview of Report Generator. In addition, you will learn about all of the latest enhancements to Sales Management that will help make your sales operations more efficient.

**Price will be quoted based on need.*

Sales Management Deal Processing Webinar *(2 hours)*

For: Sales Management Users

We will cover deal processing from start to invoicing in the latest version of Sales Management. Learn to generate quotes, take trade-in units into inventory, add additional unit and deal charges, and calculate FET charges and sales tax. We'll also review procedures for entering financial information, creating multiple deal packets per deal, and generating customer invoices and customer service units.

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SALES CONT.

Sales Management Deal Accounting Webinar *(1 hour)*

For: Sales Management Accounting users and/or Managers

This is a detailed overview of accounting transactions generated within Sales Management as a result of the unit sales process and after sales expense. The user will learn about the functions within the deal itself, such as posting deal deposits or down payments and posting early trade-ins, as well as deal packet accounting.

Sales Management Floor Plan Webinar *(1½ hours)*

For: Sales Managers, Sales Administrators, Sales Personnel, General Managers

We'll cover floor plan reconciliation, including tracking flooring expense by unit and allowing posting to the general ledger, how to set up and maintain floor plan lenders and floor units, and how to maintain and post flooring worksheets.

Sales Management Salesperson Commissions Webinar *(1 hour)*

For: Sales and Accounting users who post and calculate Commission

Attend this webinar to experience the unit salesperson commission in Sales Management. Learn about the features that let you calculate commissions, the commission worksheet, tiered commissions, after sales commissions, and commission reports.

Sales Management Overview Webinar *(2 hours)*

For: Sales Managers, Sales Coordinators, Sales Administrators, General Managers

Sales Management offers comprehensive unit and deal tracking in a user-friendly Windows interface. This webinar will be a high-level overview that will briefly cover navigation, setup, unit inventory maintenance, local purchase orders, deal processing, ordering, receiving, accounting review, and reporting features.

Sales Management Sales Purchase Orders Webinar *(1 hour)*

For: Sales Coordinators, Sales Managers, Sales Administrators, General Managers

Sales Management offers comprehensive unit and deal tracking in a user-friendly Windows interface. This webinar will be a high-level overview that will briefly cover navigation, setup, unit inventory maintenance, local purchase orders, deal processing, ordering, receiving, accounting review, and reporting features.

SERVICE

Service "Did You Know?" Webinar *(1 hour)*

For: Dealer Principals, General Managers, Service Managers, Service Writers

By popular demand, this class has been expanded to provide a more in-depth look at the Service module. Learn new tips, enhancements, and little-known techniques in various programs that will increase productivity and efficiency.

Remanufacturing Webinar *(1 hour)*

For: Controllers, General Managers, Service Managers, Service Writers

Learn to set up necessary files, parameters, and customers to accurately create reman repair orders. We'll review the process of creating a reman repair order, tracking both material and labor to remanufacture any product in your inventory from the time of creation through invoicing.

Service Management Training *(2 days Onsite or In-house)*

For: Service Managers, Service Writers, Branch Managers, Warranty Administrators

Attend this class for in-depth instruction on the functions and uses of Service Management. Learn how each step to complete a job in the service shop is entered and tracked. We will start with the basic repair order and then delve into details such as adding parts, labor, and miscellaneous charges. We will also show you setup procedures that will help managers control criteria such as the hourly rate for specific customers, deferred repairs, and tracking technician performance. The available reports will be briefly covered along with the Report Generator application to build your own reports. This overview offers both current and future users a better understanding of the functional benefits inherent in Service Management.

**Price will be quoted based on need.*

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KARMAK TRAINING OPTIONS

SERVICE CONT.

Getting More from Service Webinar *(1 hour)*

For: Service Managers, Service Writers, System Managers, Dealer Principals, General Managers

Review the repair order process, including tracking repair orders, history of repair types, and creating and maintaining repair order status codes. Learn how to change invoice descriptions for alternate accounting and enhance repair orders with additional fields for tracking customer and unit information. Gain a better understanding of what parameters may be affecting the reports you run and the programs you use. We will show you the reports you need to run to see if your shop is running at peak performance.

Miscellaneous Purchase Orders for Parts & Service Webinar *(1 hour)*

For: Parts Counter, Service Writers, Service Managers, Parts Managers, Accounting Personnel

The use of the miscellaneous purchase order impacts all departments in your company. Learn the “do’s and don’ts” for creating, referencing, and billing out a miscellaneous purchase order in this session. Gain a better understanding of how and why to use miscellaneous purchase orders for more efficient processing and recording of essential information in your system.

Repair Order Entry/Processing & Invoicing Webinar *(1 hour)*

For: Service Managers, Service Writers

There are many options for you to choose from when creating a repair order. We will review all of these various options, including unit, repair type, or customer searches, and adding and maintaining repair order detail. We will review the invoicing process, including reviewing parts, labor, and comments, and applying billing adjustments. This class is appropriate for a new hire or as a refresher course.

Service Warranty Processing Webinar *(1 hour)*

For: Warranty Managers, Warranty Clerks, Warranty Personnel, Service Managers

Learn how to generate, maintain, and download warranty claims through the system. Learn how a claim gets created from the information on the repair order and how to maintain warranty claims before downloading.

Time Entry Management & Labor Reconciliation Webinar *(1 hour)*

For: Controllers, General Managers, Service Managers, Service Writers, Office Managers

Is adjusting technician time slowing down productivity in your Service department? Let us show you the program options for adjusting and adding technician time, billable and non-billable procedures, as well as open and closed time transactions. We’ll also show you reports that make labor reconciliation easier to understand and correct, as well as parameter options that will shift your service department efficiency into the next gear.

Service Scheduling Overview Webinar *(1 hour)*

For: General Managers, Service Managers, Service Writers

Eliminate frustration by efficiently tracking customer appointments and scheduling service shop resources with Scheduling. Quickly search, schedule, and share appointment information across business operations using one straightforward product that integrates with Karmak systems. Come see an overview of the features Scheduling offers, such as creating repair orders and scheduling and dispatching appointments.

Service Deferred Repairs Webinar *(1 hour)*

For: Dealer Principals, General Managers, Service Managers, Service Writers, Service Personnel

The Deferred Repairs feature of Service Management gives you the ability to flag a repair as deferred, indicate the deferred status on the invoice, associate the deferred repair status with the unit, and remind service writers that the repair has not been completed the next time a repair order is opened for that unit. Experience this whole new world of deferred repair orders and enhance your customer service efforts and the overall performance of your customer’s equipment.

Service Management Overview Webinar *(1 hour)*

For: Service Personnel

Dive into the Service Management module, designed to improve service sales through effective analysis and efficient pricing of your services. Review basic setup and functionality, walk through the major applications, and see features such as attached documents, technician performance, and more.

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KARMAK™ TRAINING OPTIONS

SERVICE CONT.

Service Labor Rates & Customer Overrides Webinar *(1 hour)*

For: Service Managers, General Managers

In this class, we will focus on the methods available to creatively price labor and miscellaneous charges based on customer needs. Learn how to structure automatic pricing so that offering discounts in appropriate places can lead to an increase in revenue in others. We will explain the effective use of a labor rate code and the capabilities of setting up a customer override record to maximize your earning potential by customer and job.

Service Comeback Webinar *(1 hour)*

For: Service Managers, Service Directors, Operation Managers

In another effort to maximize your efficiency using details in the service shop, this session focuses on the ability to track and code tasks as comeback tasks. The comeback feature allows you to automatically be notified of a potential comeback task. We will demonstrate how the current task can be set as a comeback task either through automatic or manual notification, and how one or more technicians can be set as the technician(s) responsible. This ability leads to a new performance measurement called proficiency.

Service Preventive Maintenance Webinar *(1 hour)*

For: Service Managers, Service Writers

Learn how to effectively utilize the Preventive Maintenance (PM) program with Service Management. Learn how to set up a PM code with a day and mileage interval. Also, learn how to use grace periods and see how it all comes together by tying everything to a unit. Adding PM to a repair order and reporting are just a few of the many features that will be covered in this class. See what the new and improved Preventive Maintenance with Service can do to boost your profits.

PARTS

Basic Customer Pricing Webinar *(1½ hours)*

For: Owners/Presidents, Dealer Principals, General Managers, Parts Managers, Inventory Control Managers, Controllers, Pricing Personnel

Learn the basics of pricing setup from the ground up. We will cover the pricing aspects of the Supplier File and Inventory File, Customer Pricing, and Customer Types, as well as the concept of price groups and how they are set up.

Advanced Customer Pricing Webinar *(2 hours)*

For: Owners/Presidents, Dealer Principals, General Managers, Parts Managers, Inventory Control Managers, Controllers, Pricing Personnel

A good understanding of pricing setup options is the first step in evaluating your current pricing setup and using these advanced pricing tools to enhance your profitability. Building on the concepts presented in the Basic Customer Pricing webinar, we will delve deeper into customer special pricing, contract pricing, promotional pricing, service pricing, cost matrix, and velocity pricing.

Cycle Counting Webinar *(1 hour)*

For: Parts Managers, Inventory Control Personnel, Warehouse Personnel

The Cycle Counting module allows you to perform physical counts on portions of your inventory on a cyclical or periodic basis. You decide what portions of your inventory are to be counted—by location and/or range of parts—and when to do the count. We will review all of the introductory steps for starting cycle counting.

Effective Core Management Webinar *(2 hours)*

For: Dealer Principals, General Managers, Parts Managers

Do your cores enhance your bottom line…or cost you money? Discover ways to maximize this critical part of your business. Learn how to set up core records to correspond with the ways your vendors charge you for cores. Examine how to price cores profitably. Learn how to track cores your customers have the right to return to you, how to print separate core invoices for customers, and how to identify reports that will aid you in managing core inventory.

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PARTS CONT.

Cost Matrix, Price Rounding, & Velocity Pricing Webinar *(2 hours)*

For: Owners/Presidents, Dealer Principals, General Managers, Parts Managers, Pricing Personnel

Using creative pricing techniques can increase your parts gross margins. Learn how to implement cost matrix and velocity pricing to enhance your company's profits.

How to Control Backorders Webinar *(1 hour)*

For: Parts Managers, Purchasing Managers, Inventory Control Personnel

Discover the features that allow you to fill customer backorders. Learn how to maintain backorders and pull them onto purchase orders. You will understand how backorders are filled during inventory postings and how to analyze backorder reports.

Inter-Branch Process Webinar *(1 hour)*

For: Parts Managers, Purchasing Agents, Receiving Personnel, Counter Personnel

Cover all steps necessary to create an inter-branch order, fill the order, and receive inventory. Review the procedures for an inter-branch transfer in Parts Order and learn to monitor open inter-branch transfers. We will also review the reports concerning inter-branch transfers.

Inventory Reporting Webinar *(1½ hours)*

For: Parts Managers, Inventory Administrators, General Managers

What should I be looking at more closely? Is there anything I can do to clean up my inventory? Am I overlooking any reports? If these are questions that you have been asking, this is the class for you. We will review various parameters and reports to keep your business running smoothly. Find out what you should be doing to make your inventory work for you.

Parts "Did You Know?" Webinar *(1 hour)*

For: Dealer Principals, General Managers, Controllers, Parts Managers, Inventory Control Personnel, Purchasing Agents

Join us to learn about new tips, enhancements, and little-known techniques in various programs that will increase productivity and efficiency in your parts department.

Inventory Returns Webinar *(1 hour)*

For: General Managers, Parts Managers, Pricing Personnel, Inventory Control Personnel

A certain reality of business is that not all merchandise is sold to customers. Fortunately, some merchandise can be returned to the vendor. The primary focus of this class is to define the business system process that will most efficiently handle the return of merchandise to the vendor while accurately tracking these transactions in inventory.

Miscellaneous Purchase Orders for Parts & Service Webinar *(1 hour)*

For: Parts Counter, Service Writers, Service Managers, Parts Managers, Accounting Personnel

The use of the miscellaneous purchase order impacts all departments in your company. Learn the "do's and don'ts" for creating, referencing, and billing out a miscellaneous P/O in this session. Gain a better understanding of how and why to use miscellaneous purchase orders for more efficient processing and recording of essential information in your system.

Parts: It All Starts Here Webinar *(1 hour)*

For: Parts Managers, Inventory Administrators, General Managers

The concrete foundation of inventory control and management starts with the use of Supplier File and the Inventory File. All pricing and purchasing functions depend on these basics. This class will provide a better understanding of the fields in the Supplier File and Inventory File and an explanation of how to use them to your advantage. This class is appropriate for a new hire or as a refresher.

Parts Order Webinar *(2½ hours)*

For: Parts Managers, Inventory Control Personnel, Parts Counter Personnel

Parts Order allows various order creation and maintenance options. We will review how to create quotes and picking lists, place backorders, and sell parts with cores. In addition, we will review all program options and prompts, including bill-only and buy-out parts, searching for customers and parts, logging lost sales, and applying miscellaneous charges. This class will also cover searching customer purchasing and return history.

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PARTS CONT.

Parts Manager Checklist Webinar *(1 hour)*

For: Parts Managers, Inventory Control Personnel

We'll cover best practices for tasks to perform daily, weekly, monthly, quarterly, and annually in the Parts module. Learn about valuable reports that will aid in inventory control and help you to analyze parts department performance.

Price Files Webinar *(1½ hours)*

For: General Managers, Parts Sales Managers, Parts Managers, Pricing Personnel

This session will cover price file setup from start to finish, including how to view the price file, a basic overview of setup, a review of how the price file is set up to provide access to information, and explanation of how to set up the price file to update your pricing.

Preparing for Physical Inventory Webinar *(1 hour)*

For: Parts Managers, Inventory Control Personnel

Learn everything you need to know about the Karmak Physical Inventory module. We'll review all steps necessary to conduct an annual physical inventory. Don't miss this discussion to learn to maintain an accurate value of your inventory.

Purchasing Process Webinar *(1 hour)*

For: General Managers, Parts Managers, Purchasing Managers, Inventory Control Personnel

Gain comprehensive understanding of the whole purchasing process for more efficient and accurate inventory control. The multiple steps in the purchase order process will be discussed in this session. Learn how to request a system-suggested purchase order and create a manual purchase order, how to maintain and finalize them, how to receive the incoming purchase orders, and how to correct receiving errors. We will also discuss the fields in the part record that impact the purchasing process.

Cross References & Substitutions Webinar *(1 hour)*

For: Parts Managers, Inventory Administrators, Pricing Personnel, General Managers, Owners/Presidents

Discuss the different types of cross references and the benefits of each, the programs used to create and maintain cross references, and how to create supersessions from one part to another.

Vendor Rebate Webinar *(1 hour)*

For: Dealer Principals, General Managers, Parts Managers, Pricing Personnel, Inventory Control Personnel

Learn how to use Karmak's Vendor Rebate module, which allows you to track sales to submit proof for a rebate from the vendor. The program captures the detail of sales made for a specific vendor to selected customers, which is useful when the vendor has agreed to rebate a percentage of the part's cost.

Kits & Assemblies Webinar *(1 hour)*

For: Parts Managers, Inventory Controllers, Purchasing Managers

Attend this session for an introduction to the Kits and Assemblies feature. We will cover the definition and creation of kits and assemblies, calculating cost and price, building and exploding kits, selling assemblies on parts orders and repair orders; and reporting.

Alternate Purchase Source Webinar *(1 hour)*

For: Parts Managers, Inventory Controllers, Purchasing Managers

Learn about the new Alternate Purchase Source feature, which provides the flexibility of stocking a part number and its quantity under one part number while being able to order it under various numbers and from various vendors.

Business Online (BOL) Overview (Covers Both Admin/ Retail Sites) Webinar *(1½ hours)*

For: General Managers, Parts Managers, Inventory Control Personnel, Parts Counter/Sales Personnel

Experience the power of the Business Online module with this comprehensive overview. Find out how to expand your market beyond your physical location by allowing your customers to place parts orders using BOL. Fully integrated with your Parts Inventory system, BOL allows your customer to search for parts, check part pricing and availability, create and maintain a shopping cart, organize a list of favorite parts, and check out, all via the internet, 24 hours a day, 7 days a week. Learn what is required to run BOL, how to set it up, and the latest enhancements that add flexibility to importing, part searches, and reporting.

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PARTS CONT.

Inter-Branch Transfers Webinar *(1 hour)*

For: Parts Managers, Purchasing Agents, Receiving Personnel, Counter Personnel

This class will cover the inter-branch transfer feature. It includes requesting an inter-branched part from the parts order and repair order. Processing inter-branch transfers and receiving them will also be covered in this session.

Multiple-Branch Purchasing *(1 day Onsite or In-house)*

For: Parts Managers, Purchasing Agents, Receiving Personnel, Counter Personnel

We will cover all steps necessary in creating an inter-branch order, filling the order, and posting it into inventory. We'll review the procedures for an inter-branch transfer in Parts Order Entry/Processing and learn to monitor open inter-branch transfers. At your request, we can also cover the Purchase Control File along with many parameters involved with multiple-branch purchasing during this session.

**Price will be quoted based on need.*

Basic Parts Manager Workshop *(2 days Onsite or In-house)*

For: Parts Managers, Assistant Parts Managers, Branch Managers, General Managers, Owners

Join us for an in-depth review of the fundamental parts management functions in the system. We will cover Parts Inventory basics including kits and assemblies, basic pricing structure, and daily operational purchasing functions, which includes backorder process, cycle counting, physical inventory, cross references/substitutions, and supersessions. We will also review key features and helpful shortcuts.

**Price will be quoted based on need.*

Advanced Purchasing Theory *(4 hour Webinar or 1 day On-Site)*

For: Parts Managers, Assistant Parts Managers, Branch Managers, General Managers, Owners

Before the wide use of computers, inventory was controlled using some sort of "Cardex" or a systematic way of walking through the shelves. Gordon Graham is often considered the father of modern inventory, whose ideas are widely accepted throughout business solution systems. Electronic inventory management helps alleviate the tedious task of replenishing stock, which was once a cumbersome and inaccurate process. Fusion takes these powerful ideas and helps you put them into practice covering theories of both min/max and buy time purchasing methods.

**Price will be quoted based on need.*

Advanced Parts Manager Workshop *(2 days Onsite or In-house)*

For: Parts Managers, Assistant Parts Managers, Branch Managers, General Managers, Owners

Attend this class to learn advanced procedures for controlling your inventory, reducing overstock, and improving inventory turns. Learn how to make quantity changes, and how and why to track them in Parts Transactions. We will also cover advanced parts pricing techniques such as advanced pricing features, contract pricing, cost matrix pricing, velocity pricing, and promotional/feature pricing. Additional topics include price file overview, core management, vendor returns, and reporting.

**Price will be quoted based on need.*

LEASE/RENTAL

Unit Inventory Webinar *(1½ hours)*

For: All L/R Users

Learn how to create and maintain units in Lease/Rental. We will cover unit search, maintenance, and display, as well as how to manage one's fleet. We will cover all fields on the Unit Maintenance screen, as well as discuss available reporting options to track your unit inventory. This class is excellent for a new hire or as a refresher.

L/R Contract Webinar *(1 hour)*

For: All L/R Users

The backbone of your lease/rental business is contract creation. During this webinar, you will learn how to create, effectively and efficiently, a lease or rental contract and how to attach it to a billing group, if necessary. You will also learn how to attach units to the contract, dispatch substitute units, and/or reserve units on the contracts.

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KARMAK TRAINING OPTIONS

LEASE/RENTAL CONT.

L/R Charges, Rates, & Customer Overrides Webinar *(1 hour)*
For: All L/R Users

This class will teach you how to create charges for L/R billing, how to combine the charges into L/R rate tables, and if necessary, how to apply override rates for specific customers.

L/R Reporting Webinar *(1 hour)*
For: All L/R Users

This webinar will identify and discuss in detail all of the reports housed within Fusion.

L/R Insurance Webinar *(1 hour)*
For: Current and past Fusion L/R users

In this session, users will learn about the new Fusion Insurance application. Users will be shown how to set up company-provided insurance, as well as how to set up customer insurance records within this newly updated feature.

L/R Billing Webinar *(1 hour)*
For: All L/R Users

This webinar is a refresher on how to bill out the contracts. Whether it is group billing, an individual contract, or an individual unit, we will cover it in this session. We will also show you how to review all of your billing history since implementing the Fusion system.

L/R Workshop *(2 days Onsite or In-house)*
For: Controllers, Rental Managers, Lease Managers, Rental and Lease Agents

This class will provide an understanding of the Lease/Rental module within Fusion. Learn how to create L/R units, create contracts, bill contracts, and effectively use the reports associated with the Lease/Rental module.

**Price will be quoted based on need.*

READY TO ENROLL?

To schedule a webinar, or for more information on additional training options, email us at webinars@karmak.com or give us a call at 800-622-6311!