TELE TRACKER

DEFINITIVE CELLULAR RETAIL MANAGEMENT SOFTWARE

Recommended Training Schedules

Use this check list to track your progress through TeleTracker trainings.

Step 1

<u>NOTES</u>

#1: Basic Setup Training

☐ Master Files: New database setup.

- ☐ Locations
- ☐ Users and Salespersons
- ☐ Disclaimers
- ☐ Lead Sources
- ☐ Reasons
- ☐ Revenue Departments
- ☐ Coupons
- ☐ Sales Tax
- ☐ Vendors
- ☐ View > Preferences

Recommended Training Schedules

Step 2

NOTES

#2: Products and Inventory

☐ Products and Inventory Training

- ☐ Entering Products
- ☐ Entering Inventory
  - Purchase Orders
  - Inventory Adjustments
- ☐ Transfers (If Necessary)
- ☐ Inventory Reports
  - Current Inventory
  - Inventory Levels
  - Inventory Values Summary & Detail
  - Inventory Worksheet
  - Inventory Reorder
  - Inventory Aging
  - Barcodes

Recommended Training Schedules

Step 3

NOTES

#3: Service Provider Training

- ☐ Service Providers
    - ☐ Entering Commissions
    - ☐ Entering Plans
    - ☐ Entering Features
    - ☐ Entering Spiffs
    - ☐ Entering Rebates
    - ☐ Service Provider Reports
        - Activation Commissions
        - Receivable Commissions
        - Activations Detail
        - Activations Summary
            - (Financial > Activities > Activations)

Recommended Training Schedules

Step 4

<u>**NOTES**</u>

#4: Salesperson Training

☐ Sales Training

- ☐ Sales
- ☐ Returns
- ☐ Exchanges
- ☐ Swaps
- ☐ Price Check
- ☐ Trace Through
- ☐ Reports
  - Cash Drawer Reconciliation
  - Salesperson Invoice Sales
  - Salesperson Product Sales
  - Daily Cash Sheet

Recommended Training Schedules

Step 5

NOTES

#5: Administration

- ☐ Security Levels
- ☐ Edit Time Clock Records
- ☐ Deactivations
- ☐ Marquee
- ☐ Management Reports
    - Activations Summary & Detail
    - Daily Cash Sheet
    - Revenue Accrued
    - Sales Tax Accrued
    - Profit and Loss
    - Deactivations
    - Commissions

Customer Relationship Management

- ☐ Creating Tasks Automatically
- ☐ Creating Tasks Manually
    - ☐ CRM Reports
        - Audit > Tasks