

TrulinX Video Training

TrulinX now offers on demand video training. These can be purchased individually or in video packages called Suites. All videos are password protected, and offer unlimited viewing for 6 months after purchase.

All single video purchases are \$149.00, unless otherwise stated. Video Suites are priced as a discounted package.

Contact our Manager of Training & Development, Julie Irvin, with questions or to purchase videos. jirvin@trulinx.com

Price Update Processing

You know them, you love them, and you have to do them. TrulinX makes updating prices easier than ever. Download this video to learn the price update process from beginning to end, including how to format your file properly, common pitfalls to avoid, and troubleshooting tips.

Physical Inventory

Physical inventory is a very crucial part of your business, but when you only perform it once a year it is easy to forget the steps. This class will provide you with an overview of the process, a review of the most common stumbling blocks, and as a bonus you will have a detailed copy of instructions for next year! And, if you have been thinking of doing cycle counting, this class will give you all the info you need to get started. Cycle counting ensures that your inventory values are always accurate, helps you keep up with your most valuable asset, and ultimately helps you serve your customers better.

Understanding Inventory Management – Setup & Maintenance (\$199)

Discusses the setup for Inventory Management Group Maintenance, which is the backbone of the TrulinX inventory management system. Material covered includes buy quantity methods, safety stock, and item ranking.

Understanding Inventory Management – Forecasting Customer Demand & Vendor Lead Times (\$199)

As a follow-up to *Understanding Inventory Management - Setup and Maintenance*, this video will focus on parameters to calculate forecasts, analyzing and auditing Forecasted Monthly Demand (FMD) and Forecasted Lead Time (FLT). FMD and FLT directly affect when you buy and how much you buy, and enables you to better take advantage of supplier discounts.

Understanding Inventory Management – Buying & Replenishment (\$199)

Have you ever questioned why the system recommended buying an item? Or why it didn't recommend buying an item? Where do zero buy quantities come from? Understanding the buying and replenishment process in the system minimizes the time your purchasing group spends on buying and maximizes their time available for truly managing your inventory. This results in better customer service and improved service levels. This class assumes knowledge gained in the prior two "Understanding Inventory Management" classes, so they are recommended as a series.

Expense Purchasing

This video explains how to enter and process expense PO's, and process vendor invoices for expenses.

Managing Counter Sales

This video will discuss how to enter a counter order, how to process a counter order return, changing payment types, as well as counter order options and available reports & inquiries.

Matrix Pricing

This video will detail all of the pricing and costing options that are available in the TrulinX system, including SPA's, emergency discounts, discount schedules, contract pricing, and cost schedules.

Sales Tax Setup

This video will detail the setup required for sales tax in TrulinX.

Vendor Return Processing

This video details the process for creating and processing a vendor return.

Recovering Freight Expense

This video talks about all of the freight options available in TrulinX so you can make informed decisions about how to use them to recover freight.

Accounts Payable – Daily Processing

This video discusses the tasks of daily processing - entering vouchers, recurring vouchers, debit and credit adjustments, doing an automatic check run, and manual check posting.

Accounts Payable – Reports & Inquiries

This video will show you the reports and inquiries available for accounts payable and checks. It also discusses common problems you might encounter, and how to fix them.

Accounts Receivable – Daily Processing

This video discusses cash receipt entry in Cash Receipt Batch Maintenance, Auto posting and On Account entry, as well as how and when to do miscellaneous adjustments to a customer account using Adjustment Codes. Processing cash deposits through Cash Deposit Maintenance will also be covered.

Accounts Receivable – Credits, Credit Rating, and Troubleshooting

This video discusses invoice corrections, credit rating options, as well as some common problems you might encounter and how to fix them.

Purchasing Order Processing – The Basics

This video will discuss important settings for purchase order entry, as well as all of the reports & inquiries available in the purchasing module.

Warehouse Management

This video discusses receiving, item put away, correcting PO receipts, inspection and disposition, and bin management.

Sales Order Processing – Basic Entry

Learn the critical areas of quote entry, and what they mean, that will have a direct impact on your customer service levels and purchasing, and other critical areas of your business.

Sales Order Processing – Commitment, Allocation, and Releasing

This is a live recording of a session conducted last year. This video details how the system determines timing of pick ticket release. We will discuss in detail all of the settings and programs available to manage pick tickets and ensure that inventory gets allocated to the right orders at the right time, and that shipping occurs when your customer needs it to.

Sales Order Processing – Reports & Inquiries

This video details all of the reports and inquiries available in TrulinX to help you track orders and critical order details.

General Ledger Basics (\$199)

This video details G/L mapping, automatic and manual posting, an explanation of Source and Type, chart of accounts setup, and many other TrulinX general ledger options. Handy help documents referenced in this video can be downloaded from our Self Service Center. **NOTE:** This video does not include any information about Microsoft Dynamics.

Accounting & Reconciliation (\$199)

This video details all of the reports and inquiries available to help you reconcile your accounts. Handy help documents referenced in this video can be downloaded from our Self Service Center. **NOTE:** This video does not include any information about Microsoft Dynamics.

Video Suites Available

We have also made discounted suites available for purchase.

Back Office Accounting Suite (\$540)

This suite includes:

- Accounts Payable – Daily Processing
- Accounts Payable – Reports & Inquiries
- Accounts Receivable – Daily Processing
- Accounts Receivable – Credits, Credit Rating, and Troubleshooting

Sales Order Processing Suite (\$540)

This suite includes:

- Sales Order Processing – Basic Entry
- Sales Order Processing – Commitment, Allocation, and Releasing
- Sales Order Processing – Reports & Inquiries
- Managing Counter Sales

Accounting Suite (\$360)

This suite includes:

- General Ledger Basics
- Accounting & Reconciliation

Purchasing Suite (\$405)

This suite includes:

- Purchase Order Processing – The Basics
- Expense Purchasing
- Vendor Returns

Warehouse Management (\$405)

This suite includes:

- Warehouse Management
- Price Updates
- Physical Inventory

Inventory Management (\$540)

This suite includes:

- Understanding Inventory Management – Setup & Maintenance
- Understanding Inventory Management – Forecasting Customer Demand & Vendor Lead Time
- Understanding Inventory Management – Buying & Replenishment

All Video Suite (\$3240)

This suite includes all of our available videos.

COMING SOON!

Be on the lookout for emails announcing the availability of the following:

Work Order Management
New User Essentials
Security Options in TrulinX
And new suites for Operations, and more!