

# Suntower Systems

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## ON-SITE TRAINING COURSE SYLLABUS: SAFE EE

This course is designed to help you and your employees get the most out of *SIMPLE ACCOUNTING*. The more you know about the system, the greater your return on investment. This course is designed to help you go beyond the basics and give you the ability to do more, faster. The course is designed to cover these four main topics:

- *Simple Accounting* concepts
- Using SAFE
- Integrating modules, including A/P and G/L and Contact Manager
- PCs, Windows, and networking

Emphasis on each topic is based primarily on your responses to the attached Company Profile. Because of our desire to accomplish as much as possible during the course we discourage students from asking for last minute changes to the curriculum. Therefore, please take the time to carefully complete these sheets with the help of all participants. We also encourage you to prepare a list of questions or topics which for which you would like special attention and include it with this form.

Sixteen hours of training are divided into four major sessions over a two day period. Each session is further divided into two hour segments, each with its own theme, with twenty (20) minute breaks in between.

### DAY 1: SIMPLE ACCOUNTING OVERVIEW & ORDER ENTRY

#### Morning

##### A. Forms and Data Entry

- Understanding products, item classes, and specs
- Understanding each field in your data files
- The best way to maintain each data file

##### B. Order Fulfillment, Receivables

- Processing orders faster from start to finish
- Tools for easier collections
- Cloned & Recurring Orders
- Quote tracking

#### Afternoon

##### A. Mailings & Contact Manager

- Using mailings with existing clients and prospects
- Making the most of the Activities and the Calendar
- Creating your own ticklers and to-do lists

##### B. Forms Management

- Implementing a Forms Management System cycle
- Form letters incorporating usage and sales history
- Usage analysis reports as a sales tool
- Automating the Reorder process

### DAY 2: MANAGEMENT CONCEPTS

#### Morning

##### A. Management Reporting

- Targeting areas of sales performance
- Projecting cash flow
- Calculating sales commissions
- Interpreting financial reports

##### B. Accounts Payable & Checkbook Management

- Predicting and minimizing cash requirements
- Using Recurring Entries to automate bill paying
- Automatically posting entries from sales
- Handling special discounts and accounts

#### Afternoon

##### A. Tips & Techniques

- Tapping the power of Saved Queries and reports
- Tips that save keystrokes during data entry
- Making each module work harder with others
- The best way to manage your time in SAFE

##### B. Networking & System Optimization

- Preventing and repairing common problems
- Indispensable commands
- How to keep your data safe and secure
- Maximizing the speed of your network

##### C. Your Questions & Review

# YOUR COMPANY PROFILE

Please take a few minutes to help us get to know your organization better. Answering the questions below are critical in tailoring the course to best fit your needs. Please consult with all users in answering.

1. How many sales people are currently employed with your company? \_\_\_\_\_

2. What is the approximate annual sales volume of your distributorship?

- < \$500k  \$500k - \$1 million  \$1 - \$2.5 million  \$2.5 - \$5 million  \$5 - \$10 million  > \$10 million

3. In terms of importance, please rate the following topics to be covered (1-5) (low to high):

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Networking                | <input type="checkbox"/> Purchase Orders And Form Specifications | <input type="checkbox"/> Management And Commission Reporting |
| <input type="checkbox"/> Windows Fundamentals      | <input type="checkbox"/> Order Entry And Fulfillment             | <input type="checkbox"/> Forms Management                    |
| <input type="checkbox"/> Accounts Receivable       | <input type="checkbox"/> General Ledger                          | <input type="checkbox"/> Accounts Payable                    |
| <input type="checkbox"/> Mailings And Form Letters | <input type="checkbox"/> Backups and Restore                     | <input type="checkbox"/> Inventory Control                   |
| <input type="checkbox"/> Quote Tracking            | <input type="checkbox"/> Warehousing                             |  |

4. Please rate your employees in terms of familiarity with the following topics (1-5) (low to high):

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Networking                | <input type="checkbox"/> Purchase Orders And Form Specifications | <input type="checkbox"/> Management And Commission Reporting |
| <input type="checkbox"/> DOS fundamentals          | <input type="checkbox"/> Order Entry And Fulfillment             | <input type="checkbox"/> Forms Management                    |
| <input type="checkbox"/> Accounts Receivable       | <input type="checkbox"/> General Ledger                          | <input type="checkbox"/> Accounts Payable                    |
| <input type="checkbox"/> Mailings And Form Letters | <input type="checkbox"/> Backups and Restore                     | <input type="checkbox"/> Inventory Control                   |
| <input type="checkbox"/> Quote Tracking            | <input type="checkbox"/> Warehousing                             |  |

5. Please indicate the importance of the following activities to your business (1-5) (low to high):

- |  |  |   |
|--|--|---|
| <input type="checkbox"/> Forms Management  | <input type="checkbox"/> Warehousing                   | <input type="checkbox"/> Remote Offices |
| <input type="checkbox"/> Inventory Control | <input type="checkbox"/> Remote Customer Order Inquiry | <input type="checkbox"/> Web Access     |
| <input type="checkbox"/> Stock Forms       | <input type="checkbox"/> Direct Mail                   |   |
| <input type="checkbox"/> Bar Coding        | <input type="checkbox"/> Ad Specialties                |   |

6. Take a few moments now and discuss your specific goals for this class.

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7. What business problems would you most like to solve using SIMPLE ACCOUNTING.

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## CONTRACT FOR CUSTOMER SITE INSTRUCTION

1. **Suntower Systems** (We) will provide \_\_\_\_\_, (You) with training services at your place of business on the following dates: \_\_\_\_/\_\_\_\_/\_\_\_\_ through \_\_\_\_/\_\_\_\_/\_\_\_\_.
2. Classes will be conducted for 8 hours each day beginning at a mutually agreed upon time each day, for a total of \_\_\_\_\_ of instruction, ending no later than 5: 00pm on \_\_\_\_/\_\_\_\_/\_\_\_\_.
3. Instruction will be conducted by an agent of Suntower Systems. This training will include and be limited to Simple Accounting for Forms Experts software only.
4. Instruction is limited to si x students for this class. The participants will include:

Names Of Scheduled Participants:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

5. You agree to provide all computer equipment necessary to operate the above software. The instructor will provide any other materials necessary to conduct these classes in a professional manner. It is in your best interest to provide a uninterrupted and comfortable environment for training to be most beneficial.
6. We will arrange accommodations for the instructor, as well as all transportation to and from our office.
7. We will, under no circumstances, be held responsible for harm, damages and/or loss of property of any kind, to you or any member of your group and office equipment including computer data, even if Suntower Systems has been previously notified of this possibility.
8. You agree to pay the following fees for these services:

\_\_\_\_ Hours training @ \$550.00 per day: \$\_\_\_\_. 00  
\$150.00 Per Diem expenses for \_\_\_\_ days: \$\_\_\_\_. 00

Subtotal: \$\_\_\_\_. 00

You also agree to pay for our instructor's transportation costs. These are estimated to be: \$600. 00

**(Please See Below For Important Notes On Transportation Costs!)** =====

**TOTAL:** \$\_\_\_\_\_

9. You agree to pay the above fees in two installments. The first is due with this signed contract and must include:
  - 1a. 33% is due with this signed contract: \$\_\_\_\_\_
  - 1b. Estimated Transportation Costs: \$600. 00

Total Deposit Due With This Signed Contract: \$\_\_\_\_\_.

(This is a non-refundable deposit which reserves your appointment.)

2. The remaining balance is due on or **before** \_\_\_\_/\_\_\_\_/\_\_\_\_ (one week before class begins) \*\$\_\_\_\_\_.

**IMPORTANT, READ CAREFULLY:** The remaining balance will reflect any adjustments to your estimated training costs. You will receive this final bill as soon as travel arrangements are made. Due to the instability of air fares we cannot guarantee estimated travel costs. You agree to pay the actual costs regardless. We make every attempt to secure the most reasonable air fares and do not mark up these costs. But since we purchase our airfares when we receive your acceptance, we cannot adjust your account should fares be reduced after a flight is booked. **You forfeit your deposit if payment is not received for the balance due within seven (7) days of training.**

Your Authorized Acceptance: \_\_\_\_\_

Dated: \_\_\_\_/\_\_\_\_/\_\_\_\_

*This acceptance applies to you and all above named members*

**Please Keep This Copy Of Your Signed Contract For Your Records!**