

PROVIDE PUMP MAGIC 2.0 TRAINING

Although Pump Magic 2.0 maintains all of the concepts of Pump Magic 1.0, all of the features have been greatly enhanced while many new features also have been added. In order to ensure proper training and understanding of the new features and modifications to standard Pump Magic features, SBM has outlined a proven strategy for a streamlined interoffice training program consisting of;

1. Basic Setup.
 - a. Default Company Information.
 - b. Accounting & Labor Information.
2. Template Selections.
 - a. Job Ticket Template Selection.
 - b. Invoice Template Selection.
3. Dispatch Schedule.
 - a. Choosing the Display Fields.
 - b. Ordering the Display Fields.
 - c. Sizing the Display Fields.
 - d. Sorting Schedule Information
4. Contact Management.
 - a. Contact Management Interface.
 - b. New Information Fields.
 - c. Contacts Tree.
 - d. Customer Job Site Interface.
5. Scheduling/Editing/Printing Jobs.
 - a. Pump Magic Job Procedures/Colors/Statuses.
 - b. Adding a Job.
 - c. Editing a Job.
 - d. Multibooking.
 - e. Sorting Job Sites.
 - f. Temporary Operators.
 - g. Pump & Operator Utilization.
 - h. Adding/Editing/Copying Job Sites.
 - i. Single & Batch Printing Job Tickets.
6. Job Ticket Data Entry.
 - a. Inputting Operator Job Ticket Data.

7. Pricing.

- a. Three Layers of Pricing.
- b. Pump Magic Pricing Concepts.
- c. Pricing Sheets.
- d. Pricing Schemes.
- e. Pricing View Options.
- f. Choosing/Ordering/Sorting Display Fields.
- g. Assigning Pricing Scheme to Customer/Job Site.
- h. Job Ticket Pricing.

8. Invoicing.

- a. Choosing/Ordering/Sorting Display Fields.
- b. Date Range Concept.
- c. Invoicing Columns and Fields.
- d. Creating/Editing Invoices.
- e. Processing Invoices.
- f. Line Items.
- g. Discounts.
- h. Sorting Invoices.
- i. Invoice Reports.
- j. Credit/Debit Adjustments.
- k. Statements.

9. Payments.

- a. Payment Columns/Fields/Colors.
- b. Creating/Editing Payments.
- c. Payment Types.
- d. Processing Payments.
- e. Credit Memos.
- f. Salesman Payments.
- g. Balance Details Report.

10. Quoting.

- a. Adding/Editing Quotes.
- b. Approving Quotes.
- c. Exporting Quotes to MS Word.
- d. Creating a Job from Quotes.

11. Customer Management.
 - a. Assigning/Changing Salesman.
 - b. Assigning/Changing Default Pricing Scheme.
 - c. Assigning/Changing Default Invoice Terms.
 - d. Assigning/Changing Customer Credit.
12. Salesman Tracking
 - a. Viewing Assigned Customer & Commissions.
 - b. Viewing/Editing Past Job Commissions.
13. Equipment Management.
 - a. Adding/Editing Equipment.
 - b. Assigning/Removing Operators.
 - c. Adding/Editing Permits.
14. Lists.
 - a. Invoice Disclaimers.
 - b. Customer Messages.
 - c. Credit Memo Disclaimers.
 - d. State & Municipal Taxes.
 - e. Quotes Terms.
 - f. Invoice Terms.
15. Generating Mailing Lists.
 - a. Creating/Editing Lists.
 - b. Generating Word Exports.
16. Past Record Management.
 - a. Deactivating Records.
 - b. Viewing Deactivated Records.
 - c. Reactivating Records.
17. User Administration.
 - a. Add/Editing Users.
 - b. Assigning Permissions.
 - c. Changing Passwords.
18. Database Utilities.
 - a. Setting the Refresh.
 - b. Backing Up/Restoring the Database.

- c. Repairing the Database.
- 19. Viewing Options.
 - a. Changing Icon Size/Labels.
- 20. Pump Magic Windows.
 - a. Opening/Viewing/Focusing/Closing Pump Magic Windows.
- 21. Prelims & Releases.
 - a. Preliminaries.
 - b. Releases.
- 22. Reporting.
 - a. Categories of Reporting.
 - b. Specifying Report Date Ranges.
 - c. Selecting Report Sort Options.
 - d. Selecting Report Columns.
 - e. Adjusting Report Columns Widths.
 - f. Special Features (Customer Balance Details).
- 23. Pump Magic Templates.
 - a. Editing Job Ticket Template.
 - b. Editing Invoice Template.
 - c. Editing Quote Template.
 - d. Editing Release Template.
 - e. Editing Prelim Templates.
- 24. Cleaning Up Converted Pump Magic 1 Records.
 - a. Deactivating Duplicate/Outdated Records.
 - i. Customers.
 - ii. Suppliers.
 - iii. Employees.
 - iv. Job Sites.
 - v. Equipment.
 - b. Editing Inaccurate/Incomplete Information
 - i. Customers.
 - ii. Suppliers.
 - iii. Employees.
 - iv. Job Sites.

- v. Equipment.
- c. Changing Customers on Jobs and Job Sites.
 - i. Moving Job Sites.
 - ii. Moving Jobs.
- d. Payment Adjustments.
 - i. Deleting Inaccurate Payments.