

## **youGROW USER TRAINING COMPETENCY CHECKLIST**

**Client:**

**Primary Person Trained:**

**youGROW Trainer:**

<b>Specific Training Detail</b>	<b>Covered by Trainer</b>	<b>User Satisfied to Competency</b>
Instructions forwarded on how to clean up MYOB Accounting database prior to installation or Instructions forwarded for EzyWine SCR Update and cleaning up for EzyWine	<input type="checkbox"/>	<input type="checkbox"/>
Entering customer details into RetailManager/EzyWine/MYOB Accounting in the correct format.	<input type="checkbox"/>	<input type="checkbox"/>
Synchronising information – understanding how to synchronise, and that we recommend at least each week on a Monday morning – for new customer letters, and when you want to run a campaign, and have up-to-date information.	<input type="checkbox"/>	<input type="checkbox"/>
Changing set-up information (should the location of the Accounting, RM shopfront or EzyWine export change at any time, the setup information will need to be changed.)	<input type="checkbox"/>	<input type="checkbox"/>
Entering contact and address information correctly – in particular, first name and surname (see conventions for entering contact information), suburb fields in Upper case, State fields as SA, VIC, NSW etc only.	<input type="checkbox"/>	<input type="checkbox"/>
Understanding the concept of “fields”, and how these are used in both filtering, and in mail merge. (This is perhaps the most critical aspect to understand in maximising your use of <b>youGROW</b> .)	<input type="checkbox"/>	<input type="checkbox"/>
Customising Outlook toolbar to add commands, Mail Merge, Filter and Define Views. Explaining how this feature can be used in any of the Microsoft Office Applications	<input type="checkbox"/>	<input type="checkbox"/>
Creating new views – specific views created during training will include:	<input type="checkbox"/>	<input type="checkbox"/>
New Customers Last Week	<input type="checkbox"/>	<input type="checkbox"/>
All customers last week	<input type="checkbox"/>	<input type="checkbox"/>
New Customers last month	<input type="checkbox"/>	<input type="checkbox"/>
All customers last month	<input type="checkbox"/>	<input type="checkbox"/>
youGROW Master View	<input type="checkbox"/>	<input type="checkbox"/>

Specific Training Detail	Covered by Trainer	User Satisfied to Competency
youGROW Query View (excluding "Do Not Contact")	<input type="checkbox"/>	<input type="checkbox"/>
Postal addresses	<input type="checkbox"/>	<input type="checkbox"/>
Create new views as desired.	<input type="checkbox"/>	<input type="checkbox"/>
Running filters – including:	<input type="checkbox"/>	<input type="checkbox"/>
All customers who have or haven't bought a particular product	<input type="checkbox"/>	<input type="checkbox"/>
All customers who have bought only once during the preceding 12 months	<input type="checkbox"/>	<input type="checkbox"/>
All customers who have not bought at all in the last 3 months, with training provided also on how to nominate any choice of time frames.	<input type="checkbox"/>	<input type="checkbox"/>
Selecting customers based on total \$ spend, number of purchases, and average \$ spend.	<input type="checkbox"/>	<input type="checkbox"/>
Selecting customers based on Items and Custom Fields, or – for RetailManager only - Departments, Categories 1 & 2 - and specific products.	<input type="checkbox"/>	<input type="checkbox"/>
Mail merge to email, letters, lists, labels and name tags. This training will focus specifically on using mail merge to generate the first two customer campaigns. (eg, New Customers Last Week, and Updating Customer Details.)	<input type="checkbox"/>	<input type="checkbox"/>
Using hyperlinks in emails, and editing the links to display different information – i.e. "Click Here"	<input type="checkbox"/>	<input type="checkbox"/>
Using Outlook for client management, including Tasks, Appointments and Phone Calls	<input type="checkbox"/>	<input type="checkbox"/>
Using Outlook to forward customer details (V Card)	<input type="checkbox"/>	<input type="checkbox"/>
Exporting data from Outlook and RetailManager	<input type="checkbox"/>	<input type="checkbox"/>
Copying data from any Outlook view, to Excel	<input type="checkbox"/>	<input type="checkbox"/>

**User Comments overall:**

Signed for and on behalf of .....

.....

Full Name: .....

Date: ...../...../.....