

Objective

The objective of this document is to specify the training syllabi, courses, standard operating procedures and test resources available to CiMSO ERP hospitality & business management software users and INNkeeper Hospitality Management School students.

Training Syllabus Overview

CiMSO training syllabi cover eight primary courses of study:

- Customer Management
- Hotel & Lodging Management
- Financial Management
- Stock (Inventory) Management
- Trading Points of Sale Management
- Activities & Services Scheduling & Management
- Real Estate Management
- Fixed Asset Management

Each syllabus contains several training modules, linked to standard operating procedures and test resources:

Customer Management				
Syllabus	Training Modules	Content	Std. Oper. Proc.	Test Resource
CRM Customer Relations Management	Customer profile management 1x2hrs	Configure/manage client profiles	T6-SOP-CRMPRO	T7-TST-CRMPRO
	Customer identification 1x1hrs	Configure/manage customer identification	T6-SOP-CRMID	
	Customer market segmenting 1x1hrs	Configure/manage status links	T6-SOP-CRMST	
	Staff task & activity management 1x1hrs	Configure/manage tasks Configure/manage messages	T6-SOP-CRMTSK	T7-TST-CRMTSK
CRE Customer Reports	Reports & printouts 1x1hrs	Use/interpret customer reports Use/interpret client console reports Use/interpret system client reports	T6-SOP-FREF800 T6-SOP-CREA114 T6-SOP-CRECR	T7-TST-CRE
COM Communication	Communication facilities 1x1hrs	Use DirectDial to call a client Use DirectFax to send a facsimile Use DirectSMS to send an SMS Create/file letters under client profile	T6-SOP-COM	T7-TST-COM
	Document Management 1x2hrs	Creating a filing index Importing existing Word /Libre docs Accessing/using merge fields	?	?
	Communication tracking 1x1hrs	Configure/manage client notes	T6-SOP-COMTR	
	Bulk communication 1x2hrs	Configure/manage bulk statuses Manage bulk mailing process Manage bulk SMS process Create/manage bulk client notes Manage client lists	T6-SOP-COMBLK	
CME Membership Management	Membership configuration 1x2hrs	Membership statuses	T6-SOP-CMEMM	T7-TST-CME
	Membership management 1x1hrs	Manage membership numbers Manage membership statuses Manage membership profiles	T6-SOP-CMEMG	

		Manage membership financial Use/interpret membership reports	T6-SOP-CME	
	Points/Loyalty control 1x1hrs	Configure/manage membership points	T6-SOP-CMEPTS	
CWF Work Flow Management	Configure WFM Projects 1x2hrs	Configure WFM resources Configure WFM processes Configure WFM actions Structure WFM projects	T6-SOP-CWFCF	T7-TST-CWF
	Manage WFM projects 1x2hrs	Process/manage WFM actions Monitor WFM project progress Generate WFM reports	T6-SOP- CWFWM	

Hotel & Lodging Management				
Syllabus	Training Modules	Content	Std. Oper. Proc.	Test Resource
HRE Reservations	Lodging Configuration 2x2hrs	Configure/management rates Configure/manage Packages	T6-SOP-HRERT	T7-TST- HRERATES T7-TST- HREPACK
	Occupancy Management 1x2hrs	Manage the occupancy grid Manage availability and quotes Create/manage FIT bookings	T6-SOP-HREOC T6-SOP-HREAVL T6-SOP-HREFIT	T7-TST-HRERES
	Channel partner bookings 2x2hrs	Create/manage TA & TO bookings Manage group bookings	T6-SOP-HRETA T6-SOP- HREGRP	
	Process Booking transactions 2x2hrs	Process/manage booking transactions Manage client preferences	T6-SOP-HFOPBT T6-SOP- HREPREF	
HRP Hospitality Reports	Reports & printouts 1x2hrs	Use/interpret hospitality reports Use/interpret booking console Use/interpret daily management statistical reports	T6-SOP- HRPA114 T6-SOP- HRPB201 T6-SOP- HRPB125 T6-SOP-HRPRTS T6-SOP-HRP160	T7-TST-HRE
HFO Front Office Management	Arrivals management 1x2hrs	Managing arrival lists and check-ins Managing levy removal from active bookings	T6-SOP- HFOARR T6-SOP-HFOLAB	T7-TST-HFO
	Guest administration 2x2hrs	Managing in house guests Guest booking folio management Perform booking transactions Process cash transactions Voucher management	T6-SOP-HFOIHG T6-SOP- HFOGFM T6-SOP-HFOPBT T6-SOP-HFOPCT T6-SOP-HFOVM	
	Daily (nightly) auditing functions 2x2hrs	Perform night auditor functions Managing booking debtors & nightly billing transactions Manage the financial detail of a client Archive/view/reprint transactions Draw and print debtor statements Cash up all funds received	T6-SOP-HFONAF T6-SOP-HFODEP T6-SOP- HFOMFD T6-SOP-HFOTRX T6-SOP-HFODST T6-SOP-HFOCFR	
	Departures management 1x2hrs	Managing departure lists and check outs	T6-SOP-HFODNT	
	Debt collection 1x2hrs	Performing pit checks Debtors (City) ledger control	T6-SOP-HFOPIT T6-SOP-HFOCLC	
HSK Housekeeping	Housekeeping configuration 1x2hrs	Configure rooms points ratio Configure staff	T6-SOP-HSKPOI T6-SOP-HSKSTF	T7-TST-HSK
	Housekeeping management	Daily room assignments	T6-SOP-HSKDRA	

	1x2hrs	Manage client preferences as special requests Manage out of order & out of service rooms	T6-SOP-HSKMCP T6-SOP-HSKOO	
HST Service Tickets	Creating & processing service tickets 1x2hrs	Configure service ticket system Create/manage service tickets Manage the ticket list console Linking assignment	T6-SOP-HSTCTS T6-SOP-HSTMST T6-SOP-FSTTLC T6-SOP-FSTLA	T7-TST-FST
	Stock dispensing 1x2hrs	Configure/manage stock stores Dispense & bill maintenance stock Use/interpret Service Ticket reports	T6-SOP-FSTSD T6-SOP-FSTSDB T6-SOP-FSTSTR	
HEM Event Management	Banqueting, Conferencing and Functions 3x2hrs	Configure event venues Configure event packages Prepare & print event quotes Event billing from quote	T6-SOP-HEM	T7-TST-HCQ

Financial Management				
Syllabus	Training Modules	Content	Std. Oper. Proc.	Test Resource
FTR Cash Transactions	Process cash transactions 1x2hrs	Process cash sales Process cash sale reversals Process foreign exchange Process payouts Process periodic cash-up Save and retrieve cash sales	T6-SOP-FTRCSS T6-SOP-FTRCSSR T6-SOP-FTRFOR T6-SOP-FTRPO T6-SOP-FTRPCT T6-SOP-FTRSR	T7-TST-FTR
FBT Bulk Transactions	Bulk transaction processing 1x2hrs	Bulk invoicing Bulk payment receipting Bulk cheque printing	T6-SOP-FBT	T7-TST-FBT
FDR Debtors Control	Debtor (AR) management 2x2hrs	Process debtor transactions Archive debtor transactions Draw/print debtor statements Booking vs. trade debtors Debtor refunds vs. debtor reversals Manage debtor console Pro-forma invoice listing Process instalment billing Process group booking payments	T6-SOP-FDRTRX T6-SOP-FDRATX T6-SOP-FDRDST T6-SOP-FDRBVT T6-SOP-FDRRR T6-SOP-FDRDC T6-SOP-FDRPIL T6-SOP-FDRIB T6-SOP-FDRGRP	T7-TST-FDR
	Deposits & City Ledger 1x2hrs	Process/manage deposits (pre-pmnt) City ledger control	T6-SOP-FDRDM T6-SOP-FDRCLC	
FCR Creditors Control	Creditors (AP) management 2x2hrs	Process creditor transactions Archive creditor transactions Draw/print creditor statements Interpret/manage creditor console Batch transaction processing	T6-SOP-FCRTRX T6-SOP-FCRACT T6-SOP-FCRCST T6-SOP-FCRCC T6-SOP-FCRBTP	T7-TST-FCR
FGL General Ledger	General ledger management 3x2hrs	Chart of accounts & AAI's Process journal transactions Manage ledger enquiry console Manage income enquiry console Manage financial year end transactions Integration to external general ledgers Inter property transfers	T6-SOP-FGLJT T6-SOP-FGLLEC T6-SOP-FGLIEC T6-SOP-FGLFYE T6-SOP-FGLEGL T6-SOP-FGLIPT	T7-TST-FGL
	Cash Books management 2x2hrs	Balance the cash books Reconcile the transfer of funds to bank account Bank reconciliation	T6-SOP-FGLBCB T6-SOP-FGLTFB T6-SOP-FGLBR	
FRE	Reports & printouts	Use/interpret transaction console	T6-SOP-	T7-TST-FRE

Financial Reporting	2x2hrs	Use/interpret client ageing console Use/interpret tax input/output report Use/interpret general ledger reports	FREF700 T6-SOP-FREF210 T6-SOP-FREF621 T6-SOP-FREGL	
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Stock (Inventory) Management				
Syllabus	Training Modules	Content	Std. Oper. Proc.	Test Resource
STO Stock Control	Stock Items & Charges 1x2hrs	Configure/manage stock items Stock code conventions & bar codes Managing cost & retail prices	T6-SOP-STOSRS	T7-TST-STO
	Stock control 1x2hrs	Process stock takes Process stock take line adjustments	T6-SOP-STOPST T6-SOP-STOSLA	
	Food Costing 1x2hrs	Configure/manage Recipes Configure/manage Event Packages	? ?	
	Gross profit management 1x1hrs	GP management Consumption forecasting Manage stock expensing	T6-SOP-STOGP T6-SOP-STOCF T6-SOP-STOSE	
SRE Stock Reporting	Reports & printouts 1x1hrs	Use/interpret stock/service reports Use/interpret transaction console Use/interpret procurement reports	T6-SOP-SRE T6-SOP-FREF700 T6-SOP-SRESPR	T7-TST-SRE
SPR Procurement	Procurement Configuration 1x1hrs	Configure procurement control Configure market lists	T6-SOP-SPRCF ?	T7-TST-SPRCF
	Transfers & Requisitions 1x1hrs	Process internal stock transfers Process purchase requisitions	T6-SOP-SPRIST T6-SOP-SPRIPR	?
	Procurement 2x2hrs	Process purchase orders Process goods received vouchers Back order management	T6-SOP-SPRPO T6-SOP-SPRCGRV T6-SOP-SPRBOM	T7-TST-SPR

Trading Points of Sale Management				
Syllabus	Training Modules	Content	Std. Oper. Proc.	Test Resource
TRE Retail Sales	ShopKeeper 1x2hrs	Process cash, debtor & booking transactions Process and link reversal transactions Create/manage cash up transactions Manage account payments Use/interpret retail sales reports	T6-SOP-TRE	T7-TST-TRE
TRR Restaurant Sales	Restaurant configuration 2x2hrs	Create/maintain product groupings and buttons Manage happy hours Configure commission structure	T6-SOP-TRRCF	T7-TST-TRRCF
	Restaurant service 2x2hrs	Process cash, debtor & booking transactions Record gratuities Manage discounts Create/manage cash-up transactions Manage commissions Manage table reservations Use/interpret F&B sales reports	T6-SOP-TRRRS	T7-TST-TRRSV

TGA Gallery Sales	Gallery browser configuration 1x2hrs	Configure stock items and images Configure LCD screen display	T6-SOP-TGACF	T7-TST-TGA
	Gallery browser management 1x2hrs	Stock and cart management Use/interpret gallery sales reports	T6-SOP-TGAGM	

Activities & Services Scheduling				
Syllabus	Training Modules	Content	Std. Oper. Proc.	Test Resource
ASP Spa Scheduling	Spa configuration 2x2hrs	Create/manage treatments and retail products Create/manage dietary and medical conditions	T6-SOP-ASPCF	T7-TST-ASPCF
	Spa scheduling 1x2hrs	Create/manage bookings on the schedule grid	T6-SOP-ASPSS	T7-TST-ASPSCH
	Spa billing 1x2hrs	Bill clients for services rendered Create/manage cash ups Use/interpret Spa reports	T6--SOP-ASPSB	T7-TST-ASPBIL
ACT Activity Scheduling	Activity configuration 2x2hrs	Create/manage activities and activity resources Link staff to activities and resources	T6-SOP-ACTCF	T7-TST-ACTCF
	Activity scheduling 1x2hrs	Schedule activities against in house and walk in guests	T6-SOP-ACTAS	T7-TST-ACTSCH
	Activity billing 1x2hrs	Process cash and debtor transactions Folio selection Create/manage cash ups Use/interpret Activity reports	T6-SOP-ACTAB	T7-TST-ACTBIL
AGO Golf Management	Green fee management 2x2hrs	Configure/manage golf course green fees	T6-SOP-AGOGFM	T7-TST-AGOFM
	Tee bookings 1x2hrs	Configure courses Create/manage T-bookings Manage item rental and fees Manage client tab Manage waiting list Block T-booking processes Process cash-up Use/interpret Golfing reports	T6-SOP-AGOTBK	T7-TST-AGOTB
	Tournament scorecard 1x2hrs	Configure/manage tournaments Process fast score entry Use/interpret scorecard reports	T6-SOP-AGOTSC	T7-TST-AGOTS

Real Estate Management				
Syllabus	Training Modules	Content	Std. Oper. Proc.	Test Resource
REA Real Estate Register	Property register maintenance 1x2hrs	Configure/maintain a property register Link multiple owners to properties Link category to property	T6-SOP-REA	T7-TST-REA
	Service levies management 1x2hrs	Configure/manage services levies Bulk levy billing	T6-SOP-REASLM	
RLE Leasing Control	Configure leasing system 1x2hrs	Leasing & metering configuration Manage leasing grid Leasing management console	T6-SOP-RLELMS T6-SOP-RLEMLG T6-SOP-RLELMC	T7-TST-RLE
	Leasing services billing 1x2hrs	Leasing charge console Leasing metering console Use/interpret Leasing reports	T6-SOP-RLELCC T6-SOP-RLELMC	
RTS Time Share Control	Time share management 2x2hrs	Create/manage reservations on time share units Manage rental pool and space bank	T6-SOP-RTSRTU T6-SOP-RTSTUR	T7-TST-RTS

	Time share transaction processing 1x2hrs	Process mass levy transactions Use/interpret Time share reports	T6-SOP-RTSMLT T6-SOP-RTSTSR	
RRE Real Estate Reporting	Reports & printouts 1x2hrs	Use/interpret Property console	T6-SOP- PREP200	T7-TST-RRE

Fixed Asset Management				
Syllabus	Training Modules	Content	Std. Oper. Proc.	Test Resource
FAS Asset register	Configure asset profiles 2x2hrs	Configure depreciation schedules Configure custom properties, statuses & asset types	T6-SOP-FASCF	T7-TST-FASCF
	Asset management 2x2hrs	Manage asset location and movement Process periodic depreciation Use/interpret Asset Register reports	T6-SOP-FASAM	T7-TST-FAS

Software and Database Tools				
Syllabus	Training Modules	Content	Std. Oper. Proc.	Test Resource
Backup Procedures	Portable Backup Process 1x1hrs	Configure backup settings, automated backup schedules	T6-SOP-TLBPBU	T7-TST-TLBPBU

End.