



30-Day Trial Playbook

This guide outlines the **recommended** activities that a trial user should partake in the application in order to fully visualize the potential of using the Mar-Kov software.

The guide is structured such that the user may simply follow the prescribed tasks and activities on a timeline basis and see the full functionality of the system. It is important that you spend at least 8 hours per week in these activities in order to fully realize the benefits of using the system.

Note: This is a companion document to the Getting Started Guide.

As always, for any questions or feedback, please do not hesitate to contact support@mar-kov.com and/or your Account Manager.

Day 1: The Big Picture

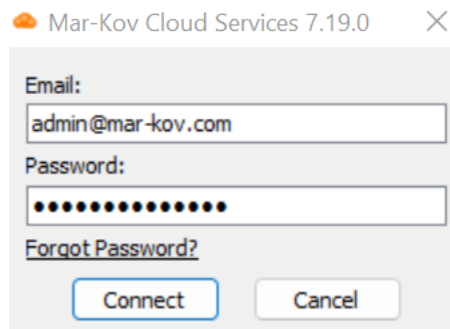
1. Logging In

Once you have downloaded Mar-Kov Lite and created your account, it is time to log in.

Click the Mar-Kov Lite icon in your desktop



The system will load and prompt you for your username and password. Enter your credentials as follows:



You may also create other user accounts in Mar-Kov for your team members. For more information about the User Account Creation feature, please see this link: [How to create a User Account](#)

The Learning Center

It is important to get familiarize with the [Learning Center](#) as this is where the resources for using the system reside.

2. Watch Walkthrough Videos

The demo videos below demonstrate the full, end to end capabilities of Mar-Kov Lite. These videos show each of the modules listed in this guide and shows the basic steps of each of the most common programs that are available in a typical process.

To see the walkthrough videos, see here:

- [Welcome to Mar-Kov](#)
- [Material Intake](#)
- [Manufacturing](#)
- [Sales and Shipping](#)

3. Review Implementation Process

Implementing a new inventory management system can be simplified by following the outlined process. We highly recommend a single super user to learn and practice each module first, and then train the rest of the team for each module. This is important in order to create a concrete structure as well as for a designated individual obtain a big picture perspective on implementation.

We have gathered from our experience that the super user should follow the steps outlined below for each module independently. This is the best way to manage and introduce the change in a structured and manageable pace:

- 1) The super user learns of the functionalities of the module.
- 2) They practice it in the software.
- 3) Necessary data is entered to perform the functions
- 4) Training the end user with regards to each functionality
- 5) Going live with the module.

Going Live means that every real-life process is reflected in Mar-Kov Lite, for that module. For example: Going Live with the manufacturing module means that all the real-life manufacturing processes are performed on Mar-Kov Lite.

Days 2-7: Setup

1. Creating Items

The first step is to ensure that you have Items set up. This allows you to reference an item used in Mar-Kov Lite. For more information about Items and how to create them, please see: [How to create Items](#)

2. Creating Customers and Suppliers

The next step is to create entities in Mar-Kov Lite that you will buy from and sell to.

For more information about Customer and Supplier creation, please see these videos:

- Customers:
[How to create a Customer - Bill To](#)
[How to create a Customer - Ship To](#)
- Suppliers:
[How to create Suppliers](#)

3. Creating Recipes

Recipes are used to inform Mar-Kov Lite what ingredients are used, in what quantities and particular procedures, to create your products.

For more information about the difference between Batching and Packaging, please see this link: [Batching Vs Packaging Orders](#)

- Creating Batching and Packaging Recipes
[How to create a Batching Recipe Express](#)
[How to create a Packaging Recipe](#)

Days 8-14: Order Creation

1. Material Intake

To record inventory in Mar-Kov Lite, we will use the programs in the Material Intake Module.

For more information about the Material Intake Module, please see this link: [Material Intake](#)

Knowledge Areas

- Creating Price Lists
[How to create a Price List](#)
- Creating Purchase Orders with and without Price Lists
[How to create Purchase Orders without a Price List](#)
[How to create Purchase Orders with a Price List](#)

2. Manufacturing Orders

This module allows you to create and plan manufacturing orders to process your raw materials into products.

For more information about the Manufacturing Module, please see this link: [Manufacturing](#)

- Creating Batching and Packaging Orders
[How to create a Batching Order](#)
[How to create a Packaging Order](#)
- Testing manufactured products
[Final In Process Testing in Batch Execution Express](#)
[Final In Process Testing in Packaging Execution](#)

3. Sales Orders

The Sales and Shipping module allows you to plan sales orders, assemble shipments, and record outbound shipments of your products to your customers.

For more information about the Sales and Shipping Module, please see this link: [Sales and Shipping](#)

Knowledge Areas

- Creating customer Price Lists
[How to Set-Up a Price List for Multiple Customers](#)
[How to Set-Up a Price List for a Specific Customer](#)
- Creating Sales Orders
[How to enter a Shipping Order without Price List](#)
[How to enter a Shipping Order with Price List](#)

Days 15 – 25: Execution

1. Material Intake

- Creating Purchase Receipts
- [Entering Purchase Receipts - Inventory No Lot Trace](#)
- Entering Bills
[How to enter a Bill Entry Inventory](#)

2. Inventory Management

This module allows you to control and manage your inventory to ensure accurate counts and quantities.

Knowledge Areas

- Entering Miscellaneous Receipts
[How to create Inventory - Inventory by Item](#)
- Inventory Count
[Counting Procedure](#)

3. Manufacturing Execution

Executing Batching and Packaging Orders

[Batch Execution Express - Inventory No Lot Trace](#)

4. Shipping

Assembling Shipments

[How to create Assemblies ahead of Shipping - Inventory No Lot Trace](#)

Shipping and Invoicing Orders

[How to create a Waybill with Reserved Inventory](#)

[How to create a Waybill and Reserve Inventory at the same time](#)

Days 26-30: Putting it all together

Now that you have a basic grasp of how the system works, see if you can follow the process and steps outlined in the walkthrough videos you watched a month ago:

- [Welcome to Mar-Kov](#)
- [Material Intake](#)
- [Manufacturing](#)
- [Sales and Shipping](#)

Conclusion

Implementing a new system to track, manage, and support your manufacturing process was hopefully made easier by this trial. The accompanying Getting Started document as well as the help of the Account Manager assigned to you are vital resources in ensuring that you are able to utilize the full potential of the trial period.

As always, if you have any questions, support concerns, or feedback, please do not hesitate to contact your Account Manager or support@mar-kov.com.