

User Training Checklist / Signoff

Major system functions and role-based training acknowledgment

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Use this checklist to document that the user has completed training for each Easy3PL function needed for their role. Check only the modules actually covered. The trainee and Easy3PL trainer should initial each completed module, enter the training date, and complete the final signoff before the form is filed.

TRAINEE / USER NAME	COMPANY / CLIENT / WAREHOUSE	USER ROLE / DEPARTMENT
EASY3PL LOGIN / USERNAME	TRAINER NAME	TRAINING LOCATION / METHOD

Core System Functions

Required or assigned by role

DONE	FUNCTION / SUBSYSTEM	TRAINING AREA / COMPETENCY	TRAINEE INITIALS	TRAINER INITIALS	DATE	NOTES
☐	Navigation & Security	Login, language selection, menu navigation, search/filter patterns, screen refresh, permissions, logout, password/security expectations.				
☐	Dashboard	Review operational cards, identify pending work, interpret unshipped orders/eOrders, low inventory, and daily activity signals.				
☐	Calendar	View planned activity, scheduled events, inbound/outbound visibility, and basic calendar filtering.				
☐	Purchase Orders	Create/review purchase orders, understand expected inbound quantities, supplier/client context, attachments, and receiving handoff.				
☐	Warehouse Receipts	Create/edit receipts, receive inventory, use receipt status, attachments, labels, charges, history, inventory pane, and movement timeline.				
☐	Receiving Inventory	Receive pallets/storage units, SKU lookup, package quantities, pieces per package, master case receiving, lot/expiration, locations, and retentions/retirements.				
☐	Orders	Create/review standard orders, request inventory, pick/unpick line items, assign pallets, set BOL/tracking, ship line items, handle backorders, and avoid manual shipped-status bypass.				
☐	Freight	Create freight quotes/shipments as applicable, review carrier/rate information, booking handoff, and shipment documentation.				
☐	eOrders	Review imported/manual eOrders, pick/pack/ship flow, batch picking, labels, returns, integrations, and shared shipment workflows.				
☐	Clients	Client setup, contacts, billing/shipping details, email fields, item ownership, permissions, billing rules, and client-specific defaults.				
☐	Inventory	Search inventory, understand on-hand/allocated/retired stock, movements, storage units, locations, lots, expirations, and inventory reports.				

User Training Checklist / Signoff

Continuation and final acknowledgment

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Additional Major Functions

Complete as applicable to the user's role

DONE	FUNCTION / SUBSYSTEM	TRAINING AREA / COMPETENCY	TRAINEE INITIALS	TRAINER INITIALS	DATE	NOTES
☐	Item / SKUs	Item maintenance, SKU/part number setup, descriptions, packaging, images, dimensions/weights, customs defaults, bundles, and package hierarchy.				
☐	Warehouse	Warehouse config, areas, aisles, bays, shelves, slots, stacks, storage unit types, location labels, warehouse fees, layouts, and picking bins.				
☐	Accounting / Invoicing	Invoices, payments, receipt/order/eOrder charges, periodic invoices, weekly/monthly invoicing, autobilling, late fees, and billing audit expectations.				
☐	Reports	Finance, receiving, orders, eOrders, inventory, FTZ, exports/downloads, filtering, date ranges, and report validation.				
☐	Administration	Users, roles/rights, site config, audit history, announcements, suppliers, carriers, warehouses, fees, payment processors, and system settings.				
☐	Shopping Integrations	Connect/review Shopify/Amazon/eBay/Magento/WooCommerce/Walmart integrations, sync status, authorization, order import rules, and error handling.				
☐	Shipping Integrations	Carrier/shipping account setup, label purchasing, shipping funding, package definitions, label reprints, and shipment troubleshooting.				
☐	Warehouse Supplies	Supplies catalog, package/box definition links, label supplies, stock adjustments, usage tracking, reorder alerts, and cost analysis.				
☐	FTZ	FTZ site config, FTZ-controlled receipts, admission lines, Generate From Receipt preview, validation/filing/authorization/receiving sequence, outbound removals, and audit trail.				
☐	Help Center	Find user guides, SOPs, videos, support materials, release notes, and internal escalation paths.				
☐	Role-Specific Task	Custom task or workflow: _____				

Final Training Acknowledgment

By signing below, the trainee confirms that the checked Easy3PL functions were reviewed, demonstrated, and practiced as required for the trainee's assigned role. The trainer confirms that training was delivered and that any exceptions, restrictions, or follow-up items are documented in the notes section.

Trainee / User Signoff

SIGNATURE

DATE

PRINTED NAME

ROLE

Easy3PL Trainer Signoff

SIGNATURE

DATE

PRINTED NAME

COMPANY

Trainer Notes / Exceptions / Follow-up Required

