

# Inventory & Accounting Workshop

## Kelowna, BC

*This Agenda is not yet final and small adjustments may still be necessary prior to the event.*



## 2-Day In-Person Workshop - Kelowna, BC Canada June 4 & 5, 2025

Join us in Kelowna this June for a hands-on workshop designed to help Windward System Five users master fulfillment, financial workflows, and inventory control—while staying ahead of supply chain disruption.

## What topics are going to be covered?

### Customer Fulfillment

- Keeping Cost Pricing Accurate
- Special Order/Back Orders
- Required Order Reporting
- Purchase Order Creation
- Receiving Procedures
- Delivery Scheduling

### Period-End Procedures

- Balancing End of Day
- Cash Clearing
- Aged AR/AP
- Reconciling Inventory
- Month/Year End Considerations

### Inventory Control

- Physical Inventory Count
- Cycle Counts
- Stock Adjustments



There will also be a Hands-on Inventory count where you get to use **System Five Sidekick**.

**Book your spot today:** <https://info.windwardsoftware.com/training-events>