

5 Hour - 1-on-1 Instructor Software Training Agenda

Lesson #1 (1.5 Hr)

- Contact Records & Security
 - Employees & Security
 - Suppliers & Payables
 - Customers & Receivables
- Vehicles & Service Items
 - CarFax & VIN Decode
 - Use Catalog & Non Catalog Vehicles
- Inventory Setup
 - Inventory Price levels
 - Unit Conversion
 - Inventory Materials
 - Tabs - General, Pricing, Batch, History
 - Inventory Menu Group
 - Search Menu Group
 - Action Menu Group
 - Export to Excel
- Work Order Setup
 - Concerns
 - Inspections
 - Inspection Results
 - Services
 - Service Package Relationship
 - Work Order Templates
- Reminders
 - Reminder Items
 - Reminder Groups

Lesson #2 (1.5 Hr)

- Work In Progress
 - WIP Options (Display)
 - WIP Panes
- New Work Order & Templates
- Work Orders
 - Tabs - Work Order, Deferred Work, Inspections, Analysis, Labor Hours, Purchases
 - Menu Groups - Actions, Insert, Work Order
 - Tasks, Contact & Vehicle (at Right)
 - Minimize & Maximize
 - Show Detail / Summary
 - Contact & Vehicle Hyperlink (Edits)
- New Estimate
- New Credit Slip
- New Appointment & View Scheduler
- Prioritization
- Time Clock

Lesson #3 (1.0 Hr)

- Utilities
- Cash Drawer Reconciliation & Bank Deposit
- Purchases
 - Supplier Invoices

- Consignment (if applicable)
- Return Items
- Warranty
- Reports (Daily Reports)
 - Sales
 - Invoice Summary
 - Vital Signs by Service Category
 - Tax
 - Other Charge Invoice Summary
 - All Reports to My Reports
- Dashboards

Lesson #4 (1.0 Hr)

- Accounting Terms (optional)
- Account Receivables (optional)
 - Setup Review
 - Accounting - Receivables
 - Menu Groups - General, Accounts, Transactions
 - Utilities (Monthly Procedures)
- Account Payables (optional)
 - Setup Review
 - Accounting - Payable
 - Menu Groups - General, Accounts, Transactions
 - Utilities (Monthly Procedures)
- Review, Question & Answer

8 Hour - 1-on-1 Instructor Software Training Agenda

Lesson #1 (1.5 Hr)

- Contact Records & Security
 - Employees & Security
 - Suppliers & Payables
 - Customers & Receivables
- Vehicles & Service Items
 - CarFax & VIN Decode
 - Use Catalog & Non Catalog Vehicles
- Inventory Setup
 - Inventory Price levels
 - Unit Conversion
 - Inventory Materials
 - Tabs - General, Pricing, Batch, History
 - Inventory Menu Group
 - Search Menu Group
 - Action Menu Group
 - Export to Excel
- Work Order Setup
 - Concerns
 - Inspections
 - Inspection Results
 - Services
 - Service Package Relationship
 - Work Order Templates
- Reminders
 - Reminder Items

- Reminder Groups

Lesson #2 (1.5 Hr)

- Work In Progress
 - WIP Options (Display)
 - WIP Panes
- New Work Order & Templates
- Work Orders
 - Tabs - Work Order, Deferred Work, Inspections, Analysis, Labor Hours, Purchases
 - Menu Groups - Actions, Insert, Work Order
 - Tasks, Contact & Vehicle (at Right)
 - Minimize & Maximize
 - Show Detail / Summary
 - Contact & Vehicle Hyperlink (Edits)
- New Estimate
- New Credit Slip
- New Appointment & View Scheduler
- Prioritization
- Time Clock

Lesson #3 (1.0 Hr)

- Utilities
- Cash Drawer Reconciliation & Bank Deposit
- Purchases
 - Bills
 - Supplier Invoices
 - Consignment (if applicable)
 - Return Items
 - Warranty
- Reports
 - Daily Reports
 - Sales
 - Invoice Summary
 - Vital Signs by Service Category
 - Tax
 1. Other Charge Invoice Summary
 - Accounting Reports
 - Payable
 - Receivable
 - All Reports to My Reports
- Dashboards

Lesson #4 (1.0 Hr)

- Accounting Terms
- Account Receivables
 - Setup Review
 - Accounting - Receivables
 - Menu Groups - General, Accounts, Transactions
 - Utilities (Monthly Procedures)
- Account Payables
 - Setup Review
 - Accounting - Payable

- Menu Groups - General, Accounts, Transactions
- Utilities (Monthly Procedures)

Lesson #5 (1.0 Hr)

- Taxes
 - Tax Agencies
 - Other Charges - Taxes
 - Taxes
 - Tax Summary
 - Menu Groups - Action, Tax Line
- Payroll
 - Payroll Agencies
 - Payroll Items
 - Payrolls
 - Payroll Entry
 - Menu Groups - Action & Utility
 - Payroll Liability Summary
 - Menu Groups - Action & Payroll Liability
- Bank & Credit Card Accounts
 - Setup - Bank & Credit Card Accounts
 - Banking
 - Bank & Credit Card Accounts
 - Menu Groups - General, Banking
- General Ledger
 - Menu Groups - Account, Journal, Report
 - Registry Accounts
 - Parent & Children Accounts
 - Opening Balances

Lesson #6 (1.0 Hr)

- Advanced Setup, Inventory & Work Orders
 - Review any Setup items in question
 - Review any Inventory items in question
 - Review and Work Order items in question

Lesson #7 (1.0 Hr)

- Review, Question & Answer