

# Online Course Descriptions

## Webinars for a New Version Release

### **New Release Orientation**

During this course you will learn about the significant operational differences between the previous e-automate version and the new version about to be released or recent releases. This course focuses on windows that are significantly different, completely new functionality, and overall operational flow changes. The intent is to reduce the confusion that can occur on the first day using a new version of e-automate. This course is a question and answer course and as such requires that you watch the online videos associated with the course prior to attending.

### **What's New in e-automate**

During this course you will learn about the new features in Digital Gateway's latest release of e-automate.

## Basic/Intermediate Webinars for e-automate

### **Accounts Payable Basics**

During the Accounts Payable basics course you will learn the different kinds of accounts payable invoices and how to create and use them. You will also view a demonstration on how to record vendor payments as well as process an accounts payable check run. In addition to processing payments as checks this course covers how to setup EFT transactions to pay vendors. This course also covers processing cash with orders as well as vendor refunds.

### **Cashbook Basics**

This course is designed to show you how to create cashbook accounts, perform cashbook transactions, and reconcile your cashbook accounts. Some of the transactions you will learn are how to create receipts and instant checks, and how to record deposits, withdrawals, charges, payments, interest, and transfers. You will also learn how to void these transactions.

### **Contracts and Meter Basics**

During Contracts and Meters you will learn about the multiple meter functionality in e-automate. You will be taught how to create makes, multiple meter models, equipment, contracts, meter billing groups, and how to bill contracts. We encourage all clients to take the Contracts and Meters to understand installment based contract, meters and contract billing.

### **Custom Properties**

You use Custom Properties to add additional attributes to Customers, Contracts, Makes, Models, and Equipment. During this course you will learn how to create attributes and organize them into Custom Property Configurations. You will also learn about the Call Back Number of Days attribute and how to set it so e-automate can flag you when you enter service callbacks that should be flagged as callbacks.

## **Deferred Contract Revenue**

This course will show you how to setup your service contract deferred revenue administrative settings as well as general ledger accounts associated with contract types. You will also learn how to recognize revenue, review revenue recognized and make corrections and adjustments to contracts and recognized revenue. During the course you will learn how e-automate handles contracts that are not fully recognized.

## **Equipment History Tracking**

You use Equipment history tracking to track transactional details about your equipment. During this course you will learn how to enable equipment history tracking, create attributes, statuses, and conditions and how to organize attributes, conditions, and statuses in Equipment History Tracking Configurations. Once you have collected equipment history, you will see how to view your collected data.

## **e-views**

During the e-views course you will learn how to more effectively get information out of your database using e-views. You will learn how e-views can be used as a data mining tool as well as how to customize e-view columns displayed, filters, functions, and links to other e-views. You will also learn how to export your customized e-views to excel for further analysis.

## **Fixed Asset Tracking**

During this course you will learn the basics of e-automate's fixed asset tracking module. You will learn how to create fixed assets and how to associate value with the fixed assets in the system. You will learn how to bring fixed asset value in using accounts payable transactions, fixed asset inventory transfers, fixed asset adjustments and importing fixed assets. In addition to understanding how to get fixed assets in e-automate you will learn how to perform depreciation on the different fixed assets in your system.

## **List and Code Review**

The list and code review course is designed to assist new users to e-automate in understanding the lists and codes that are a required component of their e-automate setup. New users that are re-architecting their software, financials, or other components of their system as they transition to e-automate will find this class beneficial. The course is designed to focus on codes in e-automate that have general ledger impact and how you can set them up to suit your business needs.

## **Monthly Closing Procedures**

You will learn the step-by-step procedures for closing a month in e-automate: what reports you should run and what checks you need to make before closing a month in e-automate. You will learn how to close a year in e-automate as well.

### **Optimization Modeling**

During this course you will learn the purpose of the optimization model offered in e-automate. You will learn that it can be used as a basic budgeting tool and how you can use it to compare your actual e-automate results to your stored budgeted numbers along with a calculated variance. Also covered during this course are income statement budget tabs, income statement actual tabs, income statement summary tabs, cash flow tabs, and balance sheet tabs. You will learn how to create a new optimization model, save the model and update a model.

### **Performing Physical Inventory**

During physical inventory you will learn how to create lists that will be used to compare the physical quantities and locations of your inventory with what e-automate has recorded. In this course you will learn how to create count sheets, inventory adjustment codes, how to record inventory counts and how to understand and review general ledger entries associated with physical inventory.

### **RTVs and RMAs (Formerly Vendor and Customer Returns)**

During this course you will learn how to correctly record the return of an inventory item to a vendor using the RTV module. You will also learn how the RMA module works to process returns from customers. Near the end of the course you will learn how to link RMAs to RTVs.

### **Using Online Help (STEPS)**

During this course you will learn the e-automate help system. You will learn how to access STEPS, how topics are organized, multiple ways to access training topics, how to search for information, how to manage user profiles, how to create managers, how managers work in STEPS, how to manage training topic profiles as well as review assessment results for yourself or your employees.

### **Using Spreadsheet Utilities**

During this course you will learn about four of the Microsoft Excel spreadsheet utilities that ship with e-automate. The course focuses on the inventory item utility, the data import/export spreadsheet, the GL import spreadsheet, and the Import Meter spreadsheet. You will learn how to use them, what their capabilities are and what their limitations are.

### **Using the Accounts Receivable Console**

During this course you will learn what functions are available in the Accounts Receivable Console: how you use it to manage notes, apply credit memo, apply payments and how the Days Sales Outstanding functionality works.

### **Using the Dispatch Console**

During this course you will learn about the basic function and flow of the Dispatch Console. You will learn about the console layout, console statuses, as well as how to create and clear service calls. In addition to the service call basics you will learn: how to handle incomplete calls, correcting service invoices, handling unknown equipment, and basic service reports.

## **Using the Inventory Logistics Console**

During this course you will learn how to use the Inventory Logistics Console to identify your inventory needs in one central location. You can request your inventory needs from transfer requests, open sales orders, and service calls that need parts. You can then use the console to automatically generate purchase orders to your vendors for your needed inventory items. You can also use the console to create inventory transfers for necessary inventory.

## **Using the Meter Request Agent**

During this course you will learn how you can use the meter request agent in e-agent. You can configure this agent to send emails or faxes to your customers for meter requests. If you are using e-info, these emailed requests will allow your users to enter their meters online and into e-automate simultaneously. This e-agent task is designed to streamline your meters collection and contract billing processes.

## **Advanced Webinars for e-automate**

### **Accounting Administration**

During this course you will learn about general ledger accounts, departments and branches. Accounting periods and accounting reports will also be discussed. This course will also review accounts payable cost allocation and accounting principles that affect inventory, purchasing and sales.

### **Advanced Contracts**

Advanced Contracts is for the advance features associated with a contract in e-automate. You will learn how to configure your automatic rate increases on your contracts, how to use the contract renewal process, and prorating equipment on your contracts. You will also learn how to handle contract accrual.

### **Auto Invoicing**

During this course you will learn about the Auto Invoice Sales Order e-agent task as well as the Auto Invoice Service Call task. How to configure the tasks so you can limit the sales orders or service calls that are automatically invoiced. You will also learn how to configure the tasks to place invoice information in the document queue for automated sending to your customers. Configuring the task to not invoice service calls when there are warnings is also part of this course. Come and learn how you can automate some of the repetitive tasks in e-automate.

### **Contract Administration**

During this course you will learn about contract types and the accounting behind them, overage types and contract bill codes and billing account codes. This course will also include equipment contract periods and information for running contract reports.

## **Digital Analytics**

Digital Analytics allows you to analyze your contract and other data using a de-normalized analytics database created through installation and updated by your e-agent program. You use this data to analyze the details of your service contracts and their profitability. During this course you will learn to install Digital Analytics as well as how to understand the legend data that is part of the e-views created by the installation of Digital Analytics. You will learn how to view rolling periods of data as well as data drawn from different fiscal periods. This course includes a review of the reports installed through Digital Analytics.

## **Document Queuing**

During the Document Queuing session you will learn how to enable document queuing functionality in your company database; how to configure your customer contacts to receive invoices via email fax, or mail. We will also show you how to automate printing of invoices if you still want to process some of your invoices in a printed format. During the online learning course, we will show you how you can automatically queue customer statements so they are sent to your customers' accounts receivable contact automatically either via fax or email.

## **e-automate Feature Administration**

This course will include the administrative options for configuring your e-automate system. This includes individual client configuration as well as company administrative options. This course covers the following option areas: Company, Sales, Purchasing, Service Calls, Contracts, Equipment, Accounts Payable, Accounts Receivable, Inventory, Payroll, Reports, and Misc. Options. During this course you will also learn the proper settings for tasks in e-agent, along with starting, running, suspending and deleting those tasks. The course also includes setting up your user profile and the administrator tools in STEPS (e-automate help).

## **e-info Configuration**

During this course you will learn how to set up your e-info website. This includes setting up inventory items and customer access. You will also learn how the customers will use the site and information on how to receive orders and service calls using e-info.

## **Inventory and Purchasing Administration**

During this course you will learn about bin defaults, inventory item lists and codes, and related items. RTV order configuration and orders for credit and replacement will also be covered. In addition, this course will include inventory and purchasing accounting.

## **Inventory Management**

During this course you will learn about three key inventory e-views that can give you important information about your inventory items. In these views you will discover item transaction counts, last transaction dates, restock levels, and min and max ratios relative to your on hand quantity. You will learn how to devalue inventory as well as be introduced to a new view that can assist you in implementing the Inventory Logistics Console. Also during this session you will get an in depth explanation of how the Update Warehouse Minimum task is used and how you can start using it, even in a small way so you can right size your on hand quantities.

## **Popular Customer Care Calls**

During this course you will learn resolutions for some of our most common calls received in the Customer Care department. These topics vary based on the calls that are most recently coming into the Customer Care team. Examples of topics covered in prior sessions are: Accumulated purchase order receipts on the balance sheet, credit card accounts in the cashbook, inventory production and assembly, and reversing purchase receipts to name a few.

## **Sales Administration**

In this course you will learn about return and on hold codes. Entering an equipment supply order, pre-billing sales orders, and sales credit memos will also be covered. This course will also include information on RMA orders for credit and replacement, along with linking RMA orders to RTV orders. During this course you will learn about backorders and how they are placed and released.

## **Service Administration**

This course will discuss the administrative setup for the service dispatch area. Included are settings for call backs, and call alerts as well as automated service call escalation. Configuring your technicians for automated restocking is also covered. In addition to service administration, this course covers calls that need parts.

## **Using e-admin**

During this course you will learn the basics of how to create and manage e-automate databases. This includes creating companies, backup company databases, restoring company databases, as well as re-indexing databases. Also covered during this class are the basics of e-automate security, including users, groups, and templates. This course also covers the administrative functions of license management, database classification, and reports.

## **Using the Contract Import Utility**

The Contract Import Utility (CIU) is a tool that allows you to create service contracts from data generated in e-automate in the form of sales order or sales invoices. You can also use the CIU to create contracts from data in Digital Quote Manager as well as data from a compliant text file, like a site survey. The CIU can create equipment in your e-automate database so you can bulk create equipment as well as push service contracts into e-automate once they are created in the CIU. The CIU allows you to bulk create meter groups so creating contracts with hundreds of equipment can be fairly simple, even with multiple meters.

## **Webinars for Add-On Products**

### **Remote Tech Administrator**

During this course you will learn the administrative setup options of Remote Tech Live. This course is designed to give you a place to learn about the different settings without your technicians present so you can make informed decisions about the options you may want to enable or disable in Remote Tech. You will learn how to configure the call list in Remote Tech as well as setup employee (technician) access to the Remote Tech web pages.

## **Using Remote Tech (Technicians)**

This course is designed to focus solely on how a technician can use Remote Tech in the field. You will learn how to login to Remote Tech as well as use the tools for item lookup, fax testing, call research, field transfers, and creating service calls from your remote device right in the field. Technicians will learn how to process service calls using the Remote Tech interface as well as how to add items to calls, identify problems and repairs and enter meters. During this session, technicians will also learn the best practice e-automate method for handling calls that are incomplete for end of day or parts needed.

## **Digital Taskforce Basics**

This course is designed to explain the basics of installing and setting up Digital Taskforce. During this course you will learn about setting up Digital Taskforce users, local users that can access Digital Taskforce as well as setting up the database connections for Digital Taskforce. During this course, once the system is set up, you will learn the basics of Digital Taskforce queries and events.

## **e-views to Digital Taskforce**

This course will walk you through creating a custom e-view and saving to a SQL view. You will also learn how to create a new query in Digital Taskforce, as well as an event based on that query. During this course you will create an email to be delivered for your Digital Taskforce event.

## **Creating Digital Taskforce Events from Scratch**

Attendance in the Digital Taskforce Basics course and a technical aptitude for SQL and database structure are pre-requisites for this course. You will discuss building queries from scratch, as well as dynamic filtering. This course also covers how to build an event based on the query that you have created.

## **Digital Quote Manager & Digital Quote Admin**

During this course you will learn how Digital Quote Manager allows you to create an opportunity, add items to your sales quotes, how to manage pricing on your quotes, how to enter prospective customers, as well as how to push a completed quote into e-automate. In addition, during this course, your administrator will learn how to create equipment configurations as well as the rule sets you can apply to equipment configurations.