



Day 1 - Accounting

Who should attend:

- General Managers
- Accounting Managers
- Accounting Clerks

Topics:

- Daily Workflow Review
- Audit Trail for Researching
- Increase Efficiencies using Templates
- Bank Reconciliation
- Best Practices for Payables
- Expand Knowledge of Reports
 - Standard Reports: Daily – Weekly – Monthly
 - Analyze Reports for Profit Margins or Errors
 - Exporting Reports
 - Cash Flow Analysis
 - New Report - Financial Export by Period
- Month end routines
 - ASPEN Report Card as Reconciling Guide
 - Posting journal entries
 - Closing the Month
- Review User Security Levels
- Winter release topics



Day 2 - Parts

Who should attend:

- General Managers
- Parts Managers
- Shipping/Receiving Counter Clerks

Topics:

- Streamline ordering process
- Inventory management
- Suggested ordering to manage capital
- Order code group rules:
 - Why use them & what do they do
 - Where and how do we create them
 - Update Mfg. code & mass update current parts
- Report Management Overview
 - Selection screens
 - Parts Analysis
- Physical inventory process
 - Importance of using proper routine for count list
 - Count lists, part lists, and mass update
- AIM use for parts
- Winter release topics



Day 3 - Service

Who should attend:

- General Managers
- Service Managers
- Service Clerks

Topics:

- Work Order Review
 - How Fields Affect Reporting
 - Flat Rate Labor vs Actual Labor
 - Adjusting Billable Hours
- Service Workflow:
 - Quoting & Converting Quotes
 - Tracking / Prioritizing Open Work Orders
 - Time Clock & Technician Notes
 - Segment Printing Options
 - Transferring Segments
 - Transfer Segments to a Quote
- Service Reporting:
 - Standard Reports: Daily – Weekly - Monthly
 - Dashboard reports (provide list)
 - New Report - Tech Performance (Efficiency Report)
- AIM use for Service
- CRM Communications for Service Managers
- Winter release topics