



Digital Gateway New User e-ssentials

Inventory and Purchasing e-ssentials

Topic
Course welcome and getting started
Inventory items Inventory items list & tools Item codes Inventory items (parts and supplies) Inventory items (equipment, makes & models) Inventory items (non-stock & expense) Item settings (prices, vendors, et cetera)
Inventory movement Transfers (quick entry and standard entry) Inventory requests Transfer orders and picking lists Bulk transfers
Inventory Adjustments Physical inventory Increases, decreases, and cost changes
Purchasing process Vendors Purchase orders list Purchase orders Purchase order linking Canceling purchase orders Receiving and partial receiving Vendor returns/unreceiving
Inventory Logistics Inventory logistics console Inventory Management Task



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Sales e-ssentials

Topic
Customers Customer codes Customers (master and locations) Contacts
Inventory items Related items and pricing
Sales transactions Sales orders (items) Sales fulfillment (items) Sales invoices
Customer returns Return codes Sales credit memos



Digital Gateway New User e-ssentials

Service Contract e-ssentials

Topic
e-views e-view review Customizing an e-view
Service Equipment Creating service equipment records Accessories on equipment
Service Contract Codes Contract Types and Contract Overage Types Billing Account Codes Bill Codes
Service Contracts Creating installment based contracts Creating deposit based contracts Billing Contracts Billing corrections Contract Rate Schedules Adding and Removing Equipment on Service Contracts



Service Dispatch e-ssentials

Topic
Dispatch Console Understanding the Dispatch Console
Entering Service Calls Service Dispatch Flow New Service Call Window Dispatching Calls Invoicing Calls
Incomplete Calls Handling calls that are incomplete (parts, day et cetera) Invoicing incomplete calls
Remote Tech Remote Tech Live Handling Incomplete calls in Remote Tech Remote Tech Tools



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Accounting e-ssentials

Topic
General Accounting General Ledger Accounts Departments and Branches GL Entries Recognizing Revenue on Contracts Closing months Transitional Accounting GL Reporting
Accounts Payable Purchase Order Invoices Vendor Invoices Credit Memos Paying Vendors Allocating Costs Payments AP Reports
Accounts Receivable Misc. Charge Invoice, Credits and Debits Accounts Receivable Console Payments Processing Credit Cards Consolidated Billing Finance Charges AR Reports
Cashbook Cashbook Accounts Cashbook Transactions Credit cards in the cashbook module Reconciling Cashbook Accounts