

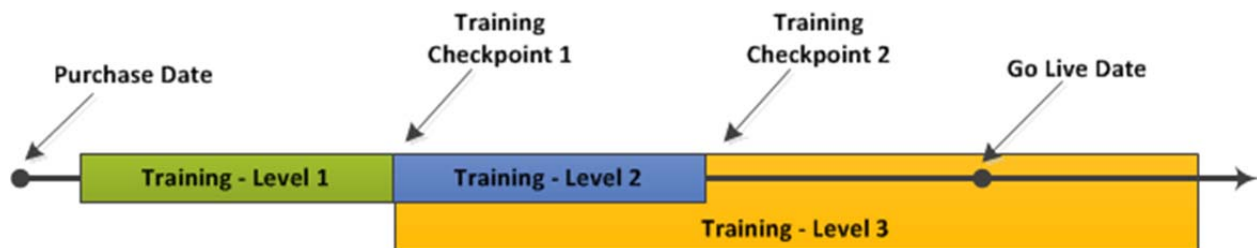
ECi e-automate Training Course Guide

Welcome to ECi e-automate. We are excited you have selected e-automate as a software tool to run your company. There are two main focuses after you have purchased e-automate, your data and your employees. The Conversion team will be focusing primarily on your data and the transition of your existing data to the e-automate format. The Training team will focus primarily on your employees and suggesting appropriate training and practice time to make sure they are trained before your go live date. During the data conversion and training processes your investment in preparation is evaluated. Moving forward to subsequent phases in the process is conditional upon your completion of prior steps. Your go live date is reserved for you as you reasonably progress. When you stop progressing you are subject to forfeiting your go live date. Typically your training evaluations are conducted with your assigned Training Mentor approximately one third and two thirds through the process. These evaluations times will be set with your Training Mentor during your training welcome call.

The training offering is broken down into three levels as follows:

- **Level 1:** Foundational concepts necessary for users to begin using e-automate. These courses, webinars, and videos are also designed to assist users in the necessary knowledge needed to conduct the data testing required by the Conversion team.
- **Level 2:** Courses, webinars, and videos that build on Level 1 knowledge and introduce administration, higher level processes, data spreadsheets, and transitional accounting.
- **Level 3:** Webinars and videos on features that are not absolutely required to be in place when you go live using e-automate. While you may choose to prepare your users in these areas, they are optional.

Level 1 must be substantially complete prior to moving on to Level 2 and Level 2 must be substantially complete before your first transaction date. Level 3 can be completed simultaneously with Level 2 or any time after your go live date depending on your products used and your training needs.



Within each level we have separated the courses out by groups or applicable modules of e-automate. These groupings help you to train employees for their specific job functions.

We offer courses in three ways; classroom, webinar and video. Each course listing will specify the medium with which it is offered.

- Classroom/Online calendars and agendas – <http://servicetechnology.ecisolutions.com/professional-services/training.aspx>
 - To register - email eatrain@ecisolutions.com.



- Learning Videos – Go to <http://servicetechnology.ecisolutions.com> and click **Customer Login**. Use your company assigned credentials and login. Once you are logged in, click on the **Learning Videos** link, located under Learning Videos. For access to your credentials see your e-automate administrator.

Level 1 – Pre Go Live

Getting Started

Course	Classroom	Online	Video
e-automate Navigation	X		X
Conversion Prep - List and Codes		X	X
Conversion Prep – Test Database Process		X	X
Conversion Prep – Go Live Expectations		X	X
e-admin		X	X

Inventory

Course	Classroom	Online	Video
Items - Parts & Supplies	X		X
Items - Equipment (Metered)	X		X
Items - Equipment (Non-Metered)	X		X
Items – Accessories	X		X
Items – Expense	X		X
Item Availability	X		X
Physical Inventory	X	X	X
Inventory Adjustments	X		X

Purchasing

Course	Classroom	Online	Video
Creating Vendors	X		X
Creating Purchase Orders	X		X
Receiving Purchase Orders	X		X

Sales

Course	Classroom	Online	Video
Creating Customers - Parent and Child	X		X
Supply Orders	X		X
Equipment Orders	X		X
Creating and Editing Sales Invoices	X		coming soon



Equipment

Course	Classroom	Online	Video
Creating Equipment	X		X

Service Contracts

Course	Classroom	Online	Video
Equipment Level Base Contracts	X	X	X
Contract Level Base Contracts	X	X	X
Cost Per Copy Contracts	X	X	X
Meter Group Base Rate Contracts	X	X	X
Deposit Based Contracts	X	X	X
Creation and Billing – Contract and Equipment level base rates as well as CPC	X	X	X
Creation and Billing – Meter Group Base Rates and Expire by click contracts	X	X	X
Creation and Billing – Deposit Based Contracts	X	X	X

Service Dispatch

Course	Classroom	Online	Video
Creating Technicians	X		X
Service Calls - Logging, Dispatching, Scheduling and Completing	X	X	X
Invoicing service calls and handling incomplete calls	X	X	X

Accounting

Course	Classroom	Online	Video
General Accounting	X		X
Accounts Payable	X	X	X
Accounts Receivable Basics		X	X
Accounts Receivable Extended		X	X



Level 2 – Pre Go Live

Getting Started

Course	Classroom	Online	Video
e-views	X	X	X

Inventory

Course	Classroom	Online	Video
Warehouses and Bins (Item and Technician)	X		X

Purchasing

Course	Classroom	Online	Video
Inventory Logistics Console	X	X	X
Inventory Management		X	X

Accounting

Course	Classroom	Online	Video
Cashbook		X	X
Processing Credit Cards		X	X
Deferred Contract Revenue		X	X

Administration

Course	Classroom	Online	Video
Accounting Administration		X	X
Contract Administration		X	X
e-automate Feature Administration			X
Inventory & Purchasing Administration		X	X
Sales Administration		X	X
Service Administration		X	X



Level 3 – Pre or Post Go Live

e-automate

Course	Classroom	Online	Video
Equipment History Tracking		X	X
Fixed Asset Tracking		X	X
Optimization Modeling			X
RMA/RTVs			X

e-agent

Course	Classroom	Online	Video
Auto Invoicing (Sales & Service)		X	X
Document Queuing		X	X
Meter Request Agent		X	X

Add-Ins

Course	Classroom	Online	Video
Budget Utility			X
Contract Import Utility			X
Sales Tax Utility			X
Spreadsheet Utilities		X	X



Add-On Products – Pre or Post Go Live if Purchased

Miscellaneous

Course	Classroom	Online	Video
Dealer Gateway (Ricoh)			X
Digital Barcode			X
Digital Analytics			X
e-info			X
PO Processor			X

Digital Taskforce

Course	Classroom	Online	Video
Digital Taskforce Basics			X
Turning an e-view into a DTF Event			X
Digital Taskforce Queries			X
Digital Taskforce Events			X
DTF Event Subscriber & Crystal Reports			X

Digital Quote Manager

Course	Classroom	Online	Video
Digital Quote Manager Admin			X
Digital Quote Manager Client			X
Digital Quote Manager Bkmrks & Tmpltes			X
Digital Quote Manager Pricing Setup			X

e-automate Commissions

Course	Classroom	Online	Video
e-automate Commissions Configuration			X
e-automate Commissions Reviewing			X

Remote Tech & Remote Service Manager

Course	Classroom	Online	Video
Remote Service Manager		X	X
Remote Tech - Administration		X	X
Remote Tech - Technicians		X	X