

# Digital Gateway New User e-ssentials

## Inventory and Purchasing e-ssentials

Topic
<b>Course welcome and getting started</b>
<b>Inventory items</b> Inventory administration 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)
<b>Warehousing and bins</b> Creating warehouses and bins Warehouses and bin defaults Restocking levels, drop ships & special orders e-agent tasks
<b>Inventory movement</b> Transfers (quick entry and standard entry) Inventory requests Transfer orders and picking lists Bulk transfers
<b>Inventory Adjustments</b> Physical inventory Increases, decreases, and cost changes
<b>Inventory reports</b>
<b>Purchasing process</b> Vendors Purchasing codes Purchase orders list Purchase order bid requests Purchase orders Purchase order linking Canceling purchase orders Receiving and partial receiving Vendor returns/unreceiving Purchasing reports
<b>Inventory Logistics</b> Inventory logistics console Inventory Management Task

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## Sales e-ssentials

Topic
<b>Course welcome and getting started</b>
<b>Inventory items</b> Related items and pricing
<b>Customers</b> Customer codes Customers (master and locations) Contacts
<b>Sales transactions</b> Sales quotes Sales orders (items) Sales fulfillment (items) Sales invoices Sales orders (service) Sales fulfillment (service) Sales Reports / e-views
<b>Customer returns</b> Return codes Sales credit memos

# Digital Gateway New User e-ssentials

## Service Contract e-ssentials

Topic
<b>Course welcome and getting started</b>
<b>Service Equipment</b> Creating service equipment records Accessories on equipment
<b>Service Contract Codes</b> Contract Types and Contract Overage Types Billing Account Codes Bill Codes Contacts
<b>Service Contracts</b> Creating installment based contracts Creating deposit based contracts Billing Contracts Billing corrections Contract Rate Schedules Adding and Removing Equipment on Service Contracts Recognizing Revenue on Contracts

## Service Dispatch e-ssentials

<b>Topic</b>
<b>Course welcome and getting started</b>
<b>Dispatch Console</b> Understanding the Dispatch Console
<b>Entering Service Calls</b> Service Dispatch Flow New Service Call Window Dispatching Calls Invoicing Calls
<b>Incomplete Calls</b> Handling calls that are incomplete (parts, day et cetera) Invoicing incomplete calls
<b>Remote Tech</b> Remote Tech Live Remote Tech Sync Handling Incomplete calls in Remote Tech Remote Tech Tools

# Digital Gateway New User e-ssentials

## Accounting e-ssentials

Topic
<b>Course welcome and getting started</b>
<b>General Accounting</b> <ul style="list-style-type: none"><li>General Ledger Accounts</li><li>Departments and Branches</li><li>GL Entries</li><li>Transitional Accounting</li><li>GL Reporting</li></ul>
<b>Accounts Payable</b> <ul style="list-style-type: none"><li>Purchase Order Invoices</li><li>Vendor Invoices</li><li>Credit Memos</li><li>Paying Vendors</li><li>AP Console</li><li>Allocating Costs</li><li>Payments</li><li>AP Reports</li></ul>
<b>Accounts Receivable - WEBINAR FOLLOWING WEEK</b> <ul style="list-style-type: none"><li>Misc. Charge Invoice, Credits and Debits</li><li>Accounts Receivable Console</li><li>Payments</li><li>Processing Credit Cards</li><li>Consolidated Billing</li><li>Finance Charges</li><li>AR Reports</li></ul>
<b>Cashbook - WEBINAR FOLLOWING WEEK</b> <ul style="list-style-type: none"><li>Cashbook Accounts</li><li>Cashbook Transactions</li><li>Reconciling Cashbook Accounts</li></ul>