

## Advanced Training Itinerary

Monday 1:00 – 4:00

**CONFIGURATION:** includes **reviewing** installation problems, security, forms configuration

**WHO SHOULD ATTEND?** *Team-Design!* system administrator, accounting personnel.

Tuesday 8:30 – 11.30

**BASIC/ ADVANCED PROPOSALS:** an exercise to create projects and proposals, adding comment lines to proposals and purchase orders, groups/subtotals, block functions within proposals, mass updating, direct bills, importing files into a proposal (copy one proposal to another, copying files from a specifier to a proposal), cutting purchase orders

**WHO SHOULD ATTEND?** salespeople who enter their own proposals, customer service, project managers

Tuesday 1:00 – 4:00

**PROJECT/PURCHASE MANAGEMENT:** change orders, add/delete purchase orders, recording acknowledgements, receiving product, delivery tickets, electronic order processing, procedures for damaged items

**WHO SHOULD ATTEND?** project managers, customer service

Wednesday 8:30 – 11.30

**ACCOUNTS PAYABLE:** includes entering payables invoices, entering recurring payable vouchers, entering/paying vendor deposits, selecting invoices for payment, manual/computer check runs, memo costing, balancing AP to the GL

**WHO SHOULD ATTEND?** accounting personnel

Wednesday 1:00 – 4:00

**ACCOUNTS RECEIVABLE:** includes proposal invoicing, pro-forma/deposit requests, deposits/payment entry, reversing/refunding payments, balancing AR to the GL, rentals

**WHO SHOULD ATTEND:** accounting personnel

Thursday 8:30 – 11.30

**GENERAL LEDGER:** includes processing journals, printing journal edits, balancing WIP account, month/year end closing procedures, printing financial statements.

**WHO SHOULD ATTEND?** Accounting personnel.

Thursday 1:00 – 4:00

**REPORTS:** a review of reports from all sections of Team-Design!, suggested uses of reports, origin of information, reports manual, custom reports

Friday 8:30 –11.30

**INVENTORY:** includes adding items to inventory, use of inventory on proposal, purchase orders and invoices. Adjusting inventory, Stock Purchase Orders.

Friday 1:00 – 4:00

**OTHER MODULES:** includes Rentals, Service Work Orders, Quick Quotes, Smart Stuff.

There will be a Q&A/exercise period Monday – Friday from 4:00 – 4:45.

It is recommended that accounting and/or management is present at ALL sessions, as accounting transactions are generated from proposal creation.