# ECi e-automate Training Course Guide

Welcome to 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 focuses primarily on your personnel and providing appropriate training and encouraging practice to assure your team is ready to use e-automate when you begin to use e-automate in a live production environment. During the data conversion and training processes your progress is evaluated. Your go live date is reserved for you as you reasonably progress both with conversion and training. When you stop progressing you are subject to forfeiting your go live date. During the conversion process your Training Mentor typically evaluates your ongoing process, to assure that you are progressing.

Typically, there is more than sufficient time to get your personnel prepared if you start early. Our best practice recommendation is to set aside 30 minutes per day per e-automate user to train in an isolated and quiet area. It is also highly recommended to send an appropriate number of users to the New User Essentials course. Being off site allows complete focus for your key users to be trained.

The training offering is broken down into three levels throughout the conversion 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. These foundational concepts also prepare you to critically evaluate your processes against e-automate functionality so you can effectively transition your operational processes to e-automate.
- **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 add on products and other 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 should be substantially complete prior to moving on to Level 2 and Level 2 should be substantially complete before your first transaction date (FTD). Level 3 can be completed simultaneously with Level 2 or any time after your go live date depending on your add on products 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 – Access the calendar, key word search Calendar in the Customer Resource Center.
  - To register - email eatrain@ecisolutions.com.
- Learning Videos – Go to http://servicetechnology.ecisolutions.com and click **Training Center Login**. Use your company assigned training credentials and login. Once you are logged in, click on the **Learning Videos** link, located under Learning Videos. For access to your training credentials see your e-automate administrator.

## Level 1 – Pre-Go Live

### Getting Started

| Course | Classroom | Online | Video |
|---|---|---|---|
| E-automate Help | X | | X |
| E-automate Navigation | X | | X (4) |
| Conversion Prep - List and Code Basics | | | X |
| Conversion Prep – Data Analysis | | | X |
| Conversion Prep – Database Testing | | | X |
| Conversion Prep – What to Expect | | | X |
| E-admin (Premise) | | X | X |
| Security Permissions (Cloud and Premise) | | 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 – Non-Stock | | | X |
| Items – Expense | X | | X |
| Item Availability | X | | X |
| Physical Inventory | | X | X |
| Inventory Adjustments | X | | X |

### Purchasing

| Course | Classroom | Online | Video |
|---|---|---|---|
| Creating Vendors | X | | X |
| Creating and Receiving Purchase Orders | X | | X |

## Sales

| Course | Classroom | Online | Video |
|---|---|---|---|
| Creating Customers - Parent and Child | X | | X(9) |
| Supply Orders | X | | X |
| Equipment Orders | X | | X(12) |
| Credit Memos and Editing Sales Invoices | X | | X |

## Equipment

| Course | Classroom | Online | Video |
|---|---|---|---|
| Creating Equipment | X | | X |

## Service Contracts

| Course | Classroom | Online | Video |
|---|---|---|---|
| Contract Creation and Billing Contract and Equipment Level Base | X | X | X |
| Contract Creation and Billing – CPC and Contract Minimum | X | X | X |
| Contract Creation and Billing - Expire by Click | X | X | X |
| Contract Creation and Billing Deposit and Time Block Contracts | X | X | X |
| Contract Creation and Billing - Meter Group Base | | X | X |

## Service Dispatch

| Course | Classroom | Online | Video |
|---|---|---|---|
| Navigating the Dispatch Console | X | | X |
| Logging Service Calls | X | | X |
| Scheduling, Dispatching and Completing Calls | X | | X |
| Invoicing Service Calls | X | | X |
| Using the Dispatch Console – Webinar | X | X | X |

## Accounting

| Course | Classroom | Online | Video |
|---|---|---|---|
| General Leger Entries | X | | X (2) |
| Closing Accounting Periods | X | | X |
| Closing Accounting Years | X | | X |
| Reopening Accounting Periods | X | | X |
| Webinar Recording – Monthly Closing | X | X | X |
| Accounts Payable Basics | X | X | X |
| Accounts Receivable Basics | X | X | X |
| Accounts Receivable Extended | X | X | X |

**New User Essentials**

| Course | Classroom | Online | Video |
| --- | --- | --- | --- |
| Inventory | X | X | X |
| Inventory and Purchasing | X | X | X |
| Sales | X | X | X |
| Contract Administration | X | X | X |
| Contracts | X | X | X |
| Contract Processes | X | X | X |
| Service Dispatch | X | X | X |
| General Accounting | X | X | X |
| Accounts Payable | X | X | X |
| Accounts Receivable | X | 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 |
| Inventory Transfers | X | | X |
| Inventory Functions | | X | X |
| Inventory Production/Refurbishment | | | X(6) |
| Inventory Functions | X | X | X |

### Purchasing

| Course | Classroom | Online | Video |
|---|---|---|---|
| Inventory Logistics Console | X | X | X |

### Sales

| Course | Classroom | Online | Video |
|---|---|---|---|
| Equipment Returns | X | X | X |
| Drop Ship – Overview and Setup | | | X |
| Drop Ship – Sales Order | | | X |
| Drop Ship – Creating and Receiving POs | | | X |
| Drop Ship – Fulfilling and E-agent | | | X |

### Service Contracts

| Course | Classroom | Online | Video |
|---|---|---|---|
| Contract Equipment Proration | | X | X |
| Contract Rate Schedules Template | X | X | X |
| Copying or Creating Rate Schedules | X | X | X |
| Rate Schedule Demonstration | X | X | X |
| Rate Schedule e-views | | | X |

### Service Dispatch

| Course | Classroom | Online | Video |
|---|---|---|---|
| Creating Technicians | X | | X |
| Handling Incomplete Calls | X | | X |
| Service Management Reporting | | | X |

## Accounting

| Course | Classroom | Online | Video |
|---|---|---|---|
| Cashbook Series | | | X (11) |
| Cashbook Basics | | X | X |
| Cashbook Extended | | X | X |
| NET1 Credit Card Processing | | X | X |
| Accounts Payable Details | | | X (5) |
| Accounts Payable – EFT Setup and Use | | | X |
| Deferred Contract Revenue | | | X |
| Webinar Recording – Deferred Contract Revenue | X | X | X |
| Recording Payroll | | X | X |
| Entering Beginning Balances | | X(5) | X (5) |
| Balance Sheet Groups/Intercompany | | | X (2) |
| Contract External Accountants | | | X |

## Administration

| Course | Classroom | Online | Video |
|---|---|---|---|
| Accounting Administration | | X | X |
| Contract Administration | | X | X |
| Inventory & Purchasing Administration | | X | X |
| Service Administration | | X | X |

## Level 3 – Pre or Post Go Live

### e-automate

| Course | Classroom | Online | Video |
|---|---|---|---|
| Branching | | X | X |
| Inventory Stock Automation | | X | X |
| Equipment History Tracking | | X | X |
| Fixed Asset Basics | | X | X(15) |
| Fixed Asset Extended | | X | X(13) |
| Optimization Modeling | | | X |
| RMA/RTVs | | X | X |
| Value Added Tax | | | X |

### e-agent

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

### Add-Ins Cloud Spreadsheet Utilities

| Course | Classroom | Online | Video |
|---|---|---|---|
| Contract Import Utility | | X | X |
| Premise Spreadsheet Utilities | | X | X(6) |
| AR Payment Utility | | | X |
| Import Meter Utility | | | X (3) |
| Xerox - | | | |
| Cloud Import Utilities - Inventory and Equipment | | X | X |
| Cloud Import Utilities - AR Payments | | X | X |
| Cloud Import Utilities - Meter Readings | | X | X |
| Cloud Import Utilities - People (Vendors, Customers, Contacts) | | X | X |
| Cloud Import Utilities - Xerox AP Invoices | | X | X |
| Cloud Import - GL Entries | | X | X |
| Cloud Import Update Utilities - Items and Item Vendors | | X | X |
| Cloud Import Update Utilities - Bin Defaults, Min Max, Related Items | | X | X |
| Cloud Import Update Utilities - Item Price Level and Customer Prices | | X | X |
| Cloud Import Utilities - Accounts Payable Invoice Import | | x | X |

# Free Video Section – Pre or Post Go Live if Purchased

## Miscellaneous

| Course | Classroom | Online | Video |
|---|---|---|---|
| Digital Analytics | | | X |
| ScanIt | | X | X |
| Digital Barcode | | | X |
| DeskTech | | X | X |
| e-info | | X | X |
| PO Processor | | | X |
| Autotask Invoice Import | | | X |
| ConnectWise Integration | | | X |
| QuickDeal Mobile Mapping | | X | X |
| QuickDeal Mobile | | X | 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 |

## Remote Tech & Remote Service Manager

| Course | Classroom | Online | Video |
|---|---|---|---|
| MobileTech App | | X | X |
| MobileTech Dispatch Portal | | X | X |
| Remote Service Manager | | X | X |
| Remote Tech - Administration | | X | X |
| Remote Tech - Technicians | | X | X |

## Add-Ins

| Course | Classroom | Online | Video |
|---|---|---|---|
| Budget Utility | | | X |
| Sales Tax Utility | | | X |
| VAT Utility | | | X |
| Making Tax Digital | | | X |
| Amortizing Leasing – Video series | | | X(8) |
| Contract Amortizing Lease – Webinar | | X | X |
| Shipping Connector (UPS/FedEx) | | | X(3) |
| Strategic Business Review (SBR) | | X | X |
| JumpTrack | | | X |

## Elite Service Reports

| Course | Classroom | Online | Video |
|---|---|---|---|
| Elite Service Report – Installation (premise) | | | X |
| Elite Service Report – Overview | | | X |
| Elite Service Report – Model Category Setup | | | X |
| Elite Service Report – Financial Trend Setup | | | X |