

EONE

END USER ACADEMY



A single-source online education center to train self-sufficient end users

Navigation and Preferences

- Menu Navigation Overview
- Menu Navigation
- Carousel
- Breadcrumbs
- Recent Reports
- Favorites
- Preferences Overview
- Preferences

Applications, Grids and Reports

- Work with Applications Overview
- Work with Applications
- Work with Grids Overview
- Basic Grid Customization
- Export and Import Grid Data
- Work with Reports Overview
- Work with Reports

Common Inquiries

- Common Inquiries Overview
- Work with Item Ledger (Cardex)
- Supplier Ledger Inquiry
- Customer Service Inquiry
- On-hand Inventory Inquiry
- Job Cost Inquiry
- Review Purchase Order Inquiry
- Account Ledger Inquiry

Address Book

- Address Book Overview
- Add an Address Book Record
- Add a Customer
- Add a Supplier
- Add Phone Information
- Add Who's Who Information
- Add Related Person Information

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Address Book Cntd.

- Address Book Inquiry
- Use Word Search

Advanced Features

- Advanced Features Overview
- Work with the Grid Format Manager
- Work with Advanced Queries
- Work with Watchlists
- Work with CafeOne Page Layouts
- Modify UX One Roles

Basic Setup and Master Data

- Basics Setup and Master Data Overview
- Company and Business Units Overview
- Account Structure Overview
- Add a New Company
- Add a Business Unit
- Add an Item Master Record
- Assign Item to Branch Plant

Accounts Payable

- Accounts Payable Overview
- Enter Standard Voucher
- Enter Speed Voucher
- Revise Unposted Vouchers
- Copy Vouchers
- Create Debit Memos
- Enter Recurring Vouchers
- Recurring Voucher Report
- Revise Recurring Vouchers
- Recycle Recurring Vouchers
- Review Vouchers
- Post Vouchers
- Change a Posted Voucher
- Enter Payment with or without Voucher Match
- Revise Unposted Payments
- Cash Requirement Report

Accounts Receivable

- Accounts Receivable Overview
- Enter Standard Invoices
- Enter Recurring Invoices
- Enter a Credit Memo
- Revise Unposted Invoices
- Enter Manual Receipts
- Revise a Receipt
- Simple Invoice Match
- Invoice Match with Manual Write-off
- Invoice Match with Chargeback

Fixed Assets

- Create an Asset Master Record
- Review and Change Depreciation Defaults for an Asset Record
- Find/Review Fixed Asset Records
- Add and Post Costs to Fixed Assets
- Split Costs to Fixed Assets
- Run Depreciation
- Review and Post Depreciation
- Transfer Location of an Asset
- Location Inquiry
- Transfer a Single Asset
- Transfer Multiple Assets
- Split an Asset
- Dispose of a Single Asset
- Dispose of Multiple Assets
- Review Transfers, Splits and Disposals
- Post Transfers, Splits and Disposals
- Review the On-line Depreciation Schedule
- Cost Summary Inquiry

Inventory

- Inventory Overview
- Inventory Issues
- Inventory Transfers
- Inventory Adjustments
- Inventory: The Cardex

Inventory Cntd.

- Select Items for Cycle Count
- Review Cycle Count
- Print Cycle Count
- Enter Cycle Counts
- Approve Cycle Counts

Purchasing

- Procurement Overview
- Enter Purchase Orders
- Enter Nonstock Items
- Enter Blanket Order
- Enter Requisitions
- Order Approvals
- Three-Way Voucher Match
- Two-Way Voucher Match

Sales Order Management

- Sales Order Entry
- Customer Information
- Direct Ship Orders
- Credit Orders
- Backorders
- Quote Orders
- Order Holds
- Transfer Orders
- Return Materials Authorizations (Issuing RMA)
- Pick Slips
- Ship Confirm
- Shipping Documents