POWER

Course Catalog

Software Education Department

Reynolds & Reynolds®

The Reynolds and Reynolds Company

Effective 7/27/2017

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CPE Credits

Reynolds and Reynolds is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. There are a variety of classes available in the Accounting, Auditing, Management Services, and Computer Software and Applications fields of study.

When looking at this catalog, look for the CPE disclaimer on those classes for which credits are awarded. Credits are awarded after the first full credit is earned (50 minutes of instruction).

Code	Session Title	Total Credits
PMC	POWER Management and Control	21.5
MACEOY	POWER Accounting End of Year Procedures	1.5
MAC1	POWER Management Accounting Daily Procedures	16.0
MAC2	POWER Periodic Accounting Procedures	16.0
MAC3	POWER Advanced Management Reports	18.0
PACC	POWER Accounting Management Overview Series	7.0
HRM	POWER Human Resources	7.0
PAY	POWER Payroll	16.0
PRC	POWER Purchase Requisition Control	5.0

For details on prerequisites, fields of study, delivery method and program level, please see individual classes.

REGULARLY SCHEDULED 'NET CLASSES

What are ‘Net Classes*?

Reynolds Software Education provides comprehensive Internet training for most POWER applications. Through live, interactive training sessions, you learn step-by-step procedures to help perform your job functions more efficiently. A live instructor can address your questions immediately. Participating in hands-on exercises helps you learn the material and software quickly.

Besides the regularly scheduled ‘Net Classes included in this document, Reynolds and Reynolds offers special Featured Sessions highlighting a specific topic.

Management Overview Series (MOS) Classes are designed to give new customers an overview of the system and key features that help increase profits, improve management oversight, and reduce costs.

How do I enroll? When are classes offered?

To enroll or for more information, go to http://support.reyrey.com

Unless noted otherwise, all sessions are 90 minutes and cost $97.00 USD per computer logged in.

Each course contains sessions that cover specific topics. Sign up for the entire course or only for the sessions you need.

For more information regarding administrative policies such as cancellations call Reynolds Software Education at 800-999-6348, your FAC code, ext. 76282 or email SED@reyrey.com. For billing information please refer to your invoice.

Prices are subject to change without prior notice. For current pricing information please contact your Reynolds representative or visit reyrey.com.

What if the class you want to take isn't offered at a time that's convenient for you? What if you want to take a class that's not regularly scheduled?

You can select a specific session or course to be taught to you at a time that's better suited for you by signing up for an On-Demand Class.

Scan the QR Code with your mobile device to send us an email if you have any questions about our classes.

Front End Classes

AOA –AddOnAuto

Prerequisites: None

AOA101 – Deals, Orders, and Account Information

Learn how to import deals into AddOnAuto (AOA) from the Dealership Management System (DMS), create a deal presentation within AOA, and then import sold accessories back into the DMS. Learn how to create and track parts orders within AOA and run essential reports to monitor dealership accessory sales.

AOA102 – Customizing the Accessories Department

Learn how to create a parts inventory in AddOnAuto (AOA). Learn how to hide or make parts visible within sales presentations and how to determine their pricing within AOA. Learn how to edit, clone, and delete accessories in AOA.

ENPAD – docuPAD® System Essentials

Prerequisites: None

ENPAD: docuPAD® System Essentials

Learn how to effectively present option packages to your customers. Learn how to guide your customers through available products and services and actively engage your customers in the buying process. Learn how you can help your customers personalize their options packages. Instantly identify which forms need to be signed and printed, and make sure nothing is overlooked before closing a deal.

CM – Contact Management

Prerequisites: None

CM101: Introduction to Contact Management

Learn the basics of Contact Management. This session discusses: navigating and customizing Contact Management, searching for and adding prospects to existing client records, and working with the My Clients screen.

CM102: Client Management

Learn how to work with clients from within Contact Management. These tasks include: adding new clients and searching vehicle inventory.

CM103: Desk and Activity Management

Learn how to perform daily tasks using Contact Management. These tasks include: working with the Prospects and Messages screens, working with the Daily Work Plan, using the Calendar, and working with mailings.

CM104: Management Tools

Learn how to manage your sales team using Contact Management tools. These tools include: using Dashboard, Desk Log, and Reporting to keep up with day to day activities.

CM105: User Security

Learn how to review dealership information and work with users. These tasks include: adding and modifying Roles and User Permissions, reassigning clients and activities, and working with User Visibility.

CM106: Documents and Distribution Rules

Learn how to add and maintain document templates and to work with internet leads using Contact Management. These tools include: creating documents, viewing internet leads, and disputing internet leads.

CM107: Managing Settings and Follow-Up

Learn how to manage and automate your customer follow-up using tools in Contact Management. These tools include: working with schedules and business unit setting.

CM108: Collection and Campaign Management

Learn how to send bulk marketing documents and manage their success using tools in Contact Management. These tools include: creating and maintaining client collections, generating bulk mail jobs, and setting up automated birthday follow-up.

Fixed Operations Classes

SPG – Service Pricing Guide

Prerequisites: None

SPG101: Estimates, Reservations, and Repair Orders

Learn how to give detailed estimates with consistent pricing, add estimates, add reservations from estimates, search for operation codes, add multiple operation codes at one time, add SPG sublines, modify labor lines, sell parts to a repair order, flag SPG labor lines, charge parts to the correct labor lines, and add additional operation codes while flagging.

SPG102: Adding Estimates without a VIN and Diagnostic Estimates

Learn how to add estimates without a VIN, and use diagnostic estimates.

SPG103: Dealer Operation Codes and Reports

Learn how to create CPO and DPO operation codes, add parts and notes to an operation code, and generate reports of operation codes to review usage.

SPG104: SPG Pricing and Controls

Learn about Labor Kickers and Sell Rate Tables, how to establish pricing rules for your SPG operations, how to review control options available for SPG/CPO, and set up a printer for printing a parts list.

TEC – Technician Electronic Control

Prerequisites: Understanding of Service (SVC) and/or Service Department Scheduling (SDS)

TEC101: Technician Functions

120 minutes

Learn about an overview of the Technician Electronic Control (TEC) application. Learn the process used to begin a repair order, how to use the Service Department Scheduling (SDS) application to find and complete jobs, display a vehicle's service history, and order parts from the Parts department.

TEC102: Electronic Mail, Final Flagging, and Invoicing Options

Learn how to send and review emails, flag repair orders by verifying flagging information entered in the SDS application, and set up printing technician times when a repair order is invoiced.

TEC103: Technician Time Card, Reports, and TEC Control Programs

Learn how to maintain and override technician times, request and review reports, and customize your TEC application.

Systems Classes

ENRITS – Reynolds Integrated Telephone System

Prerequisites: None

RITS101 – Reynolds Integrated Telephone System

Learn how to utilize features of the Reynolds Integrated Telephone System (RITS), use communication tools available within the RITS Desktop Application (RDA), handle customer calls, and customize the RDA to better meet your needs.

CLASSROOM CLASSES

Besides the regularly scheduled 'Net Classes, Reynolds and Reynolds offers classroom classes that allow participants to learn away from their dealership and without distractions how to better use POWER and CM to help their business.

Classroom classes are held in Houston, TX. To see where classes are offered please visit our website http://www.reyrey.com/support/training/powernet.asp.

How do I enroll?

Call Reynolds Software Education 800-999-9648, your FAC code, ext. 76282 or email SED@reyrey.com.

Unless noted otherwise, all classroom classes are a full day class with breakfast and lunch included and cost $321.00 USD per person per day.

For more information regarding administrative policies such as cancellations call Reynolds Software Education at 800-999-6348, your FAC code, ext. 76282 or email SED@reyrey.com. For billing information please refer to your invoice.

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DLR- Dealer Overview

Prerequisites: None

DLR100: Dealer Overview Course

Classroom Instructed - 2 days

Learn how your POWER software applications work together to help you gain and retain customers, how to quickly review all of the daily exceptions in sales, service, parts, accounting or any other area. You can also learn to monitor showroom activity, monitor vehicle sales and service, how POWER applications protect your profit, increase sales opportunities, give your people the tools to build customer loyalty, and instantly see the overall financial position of the dealership.

CCM – Contact Management

Prerequisites: None

CCM101: Contact Management

Classroom Instructed - 3 days

Learn how to utilize Contact Management to work smarter and improve efficiency in your sales department. Contact Management can help you improve your overall customer experience by helping you build and maintain relationships while streamlining your process to make each customer interaction a quality interaction.

Learn how Contact Management can help you set and track goals for your sales team, as well as report on overall sales progress. Learn how to better manage internet leads and prospect follow-up with the use of Distribution Rules and Schedules. Contact Management can help you set your dealership apart from the rest with the use of targeted marketing using Client Collections. A great class for Sales Managers, General Managers, General Sales Managers, and BDC/Internet Managers.

PMC – POWER Management and Control

*CPE Credits: 21.5**

Program level: Basic

Prerequisites: None

No advanced preparation is required.

Delivery method: Group Live

Field of study: Accounting, Auditing, Management Services, Computer Software and Applications

PMC101: POWER Management and Control

Classroom Instructed - 3 days

Learn how the POWER software applications work together to help you gain and retain customers. Build your own real-time Dashboard display of the items you monitor most closely. Understand how to efficiently control access within your POWER applications to improve compliance and protect valuable customer and business information. Learn to use Managing Accounting dynamic reports to truly understand the overall finances of your entire enterprise.

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PFOM – POWER Fixed Operations Management

Prerequisites: None

PFOM101: POWER Fixed Operations Management

Classroom Instructed - 3 days

Learn how to streamline Service processes to make more money, analyze reports and recognize problem areas. Learn about ways to fine-tune pricing and control discounts and policy adjustments to improve profitability, and increase efficiency and productivity by reviewing and managing Service controls.

MANAGEMENT OVERVIEW SERIES

What are Management Overview Series classes*?

Management Overview Series (MOS) classes are 'Net Classes designed to give new customers an overview of the system and key features that help increase profits, improve management oversight, and reduce costs.

There are Management Overview Series Classes for all areas at the dealership: Parts, Service, Accounting*, Sales and System Administration. These classes are 1 to 4 sessions long and each session lasts approximately 90 min. The cost per session is $97.00 USD per computer logged in.

For more information regarding administrative policies such as cancellations call Reynolds Software Education at 937-485-1700 or email SED@reyrey.com. For billing questions please refer to your invoice.

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PACC – Accounting Management Overview

*CPE Credits: 7.0**

Program level: Basic

Prerequisites: None

No advanced preparation is required.

Delivery method: Group Internet Based

Field of study: Accounting, Auditing, Computer Software and Applications

PACC101: Introduction to Management Accounting and Payables

Learn how the Management Accounting (MAC) application saves you time by integrating with other departments, easily find a vendor's payable balance without consulting a schedule and write a check. Learn how to perform daily payable processes, and interpret and troubleshoot amounts using onscreen inquiries.

PACC102: Cash Receipts and Correcting Errors

Learn how to find a customer's receivable balance without consulting a schedule and write a receipt, analyze posting records using various on screen displays and inquiries, and understand how to handle posting errors.

PACC103: Departmental Posting Procedures

Learn how to understand the basics of batch and real-time parts and service posting, understand how the Parts Accounting Interface is used to account for on-hand resets and inventory appreciation, control expenses by correcting posted repair orders after technicians have been paid, post vehicle purchases quickly and easily, control vehicle cost errors by using the Purchase Requisition Control (PRC) application for vehicles, and post vehicle sales with just a few keystrokes.

PACC104: Reports, Displays, and Office Productivity Tools

Learn how to review financial statements, G/L analysis reports, DOCs, and Front-End Management (FRM) reports on screen, use accounting productivity tools to increase efficiency, and how to automatically reconcile cash-in-bank to the bank statement.

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PFE – Front-End Management Overview

Prerequisites: None

PFE101: Vehicle Inventory Management

Learn about reviewing the vehicle posting process. Learn how to view open ROs and purchase orders, and troubleshoot using timestamps. Learn about Inventory Inquiries, vehicle inventory reports, cloning vehicle records, and vehicle purchase orders.

PFE102: Sales Management

Learn about an introduction and overview of the Sales Prospect Control process. Learn how to set your monthly goals per salesperson and define the steps in your selling cycle. Learn about daily to do lists for salespeople, Instant Traffic Reports (SPI), how to view current customers, customize query reports, deal with turnover and re-assign prospects, and clone wholesale deals.

PFE103: Desking Deals

Learn how to compare multiple deals side by side using Multiple Scenarios and how to review a Household record. Learn about securing gross profit figures, rolling to a payment, printing using Auto-Forms, tracking deal jackets with Deal Flow, and cloning deals.

PFE104: Front-End Management Reports

Learn how to troubleshoot deal problems. Learn about instant front-end reports, how to print and customize reports, and review an Instant DOC from Management Accounting.

PPAY – Payroll Management Overview

Prerequisites: None

PPAY101: Introduction to Payroll

Learn to explain the steps to processing a POWER payroll, how to set up a new hire in the Name and Address (NAD) application, analyze a payroll calendar, and distinguish between the different types of cycles.

PPAY102: Adding Employees

Learn to explain different pay methods and department distribution, how to enter a new hire's earnings, taxes, and deductions, and learn how to auto pay employees to save time.

PPAY103: Paychecks, Posting, and Reports

Learn how to handle different paycheck scenarios, integrate service, time clock, and accounting information into paycheck requests, post payroll accounting to the G/L, and use on-screen and printed reports to analyze current and historical payroll information.

PPAY104: Human Resource Management

Learn about how Human Resource Management (HRM) helps maintain a paperless information file for dealership employees, how to add personnel, benefits, and department information for employees, and use on-screen and printed reports to analyze previous promotions, performance reviews, and earnings history.

PPTS – Parts Management Overview

Prerequisites: None

PPTS101: Invoicing

Learn how to inquire into parts, sell parts over both the front and back counters, display parts sales information, understand matrix pricing, utilize invoicing reports, and analyze the Service Drive Fill Rate Report.

PPTS102: Inventory

Learn how to display information about a part, understand the parts system features that help with the mix of parts in inventory, utilize the Online Transaction Journal to research activity in the inventory, understand the stock order process, analyze the stock order reports as well as the Parts Financial Analysis, and utilize the Management Inventory Analysis reports to research parts issues.

PPTS103: Special Orders

Learn how to create special order part records for ordering, receipting, and selling. Learn how to utilize special order reports for management and customer notification purposes, customize My Favorites to include shortcuts and to monitor parts issues, and analyze Queries to monitor SPO inventory.

PSVC – Service Management Overview

Prerequisites: None

PSVC101: RO Procedures

Learn how POWER Service can help advisors increase profit by selling additional repairs to each RO. Learn how POWER can help your department cut expenses when working with internal ROs. Learn the different types of discounts available in POWER and how you can control them to maintain high profit and avoid abuse, and understand how your advisors can use POWER to increase your profit by scheduling your customer's next visit.

PSVC102: Service Management

Learn how to find important information in POWER Service that helps Service Managers make informed decisions, learn how to keep track of every repair order in one screen, analyze customer records and identify information that can help Service Managers make informed decisions, and understand how to keep customer records clean.

PSVC103: Service Management Reports and Favorites

Learn about the different reports available in POWER that can help you control expenses, as well as measure profit and efficiency in your Service Department. Learn how to keep your customer records clean and accurate to help you hold successful marketing campaigns, and learn how to customize your POWER system to give you easy access to information needed to manage the Service Department.

PSYS – Systems Management Overview

Prerequisites: None

PSYS101: Security Management

Learn about the training resources available for POWER, learn about the benefits of using User Groups to easily create UserIDs for dealership employees, learn how to control password access and troubleshoot security issues, and how to manage Computer Assisted Instruction (CAI) courses.

PSYS102: System Management

Learn about system-wide POWER features and how they can improve POWER utilization at your dealership. Learn about the POWER software update process and how to process POWER reports.

ON-DEMAND 'NET CLASSES

What are On-Demand Classes?

Besides the regularly scheduled 'Net Classes, Reynolds and Reynolds offers on-demand classes covering specific topics. You can request classes from the regular schedule to be taught at the time convenient for your dealership, or you can also request classes that are not regularly scheduled.

Unless noted otherwise, all on-demand sessions are 90 minutes and cost $321.00 USD per computer logged in.

How do I enroll?

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Business Office Classes

ACC – Accounts Receivable

Prerequisites: None

ACC101: Accounts Receivable

Learn about an overview of the Management Accounting system, the MAC two-open-posting-months feature, MAC Drop, reviewing A/R detail, reviewing A/R credit history, finding A/R accounts past due, and running A/R end of month statements.

ANA – Account Analysis Reports

Prerequisites: None

ANA101: Account Analysis Reports

Learn how to build an Account Analysis Report using special tools in POWER, request the Account Analysis Report, copy an existing Account Analysis Report, an use the Sales Tax Analysis Report and New Vehicle Sales Analysis Report.

EOY – Payroll End-of-Year

Prerequisites: PAY - Payroll OR experience with PAY

EOY101: Payroll End-of-Year

Learn about the steps required to prepare for and process end-of-year payroll, as well as what to do after the end-of-year cycle is complete. Learn how to transmit or print W-2s and other quarterly reports.

GLD – G/L Distributions

Prerequisites: None

GLD101: G/L Distributions

Learn how to create G/L distributions, clone and modify G/L distributions, use advanced features when adding G/L distributions, and request G/L distribution reports.

HRM – Human Resource Management

*CPE Credits: 7.0**

Program level: Basic

Prerequisites: None

No advanced preparation is required.

Delivery method: Group Internet Based

Field of study: Auditing, Computer Software and Applications

HRM101: Employee Personnel Maintenance

Learn how to add name and address records for use in HRM, add employees into HRM, enter medical, dependent, insurance and educational data, input historical earnings, and create to-do checklists.

HRM102: Employee File Maintenance

Learn how to maintain the title file, add performance evaluations, earnings and general notes. Learn how to enter vehicle incidents and disciplinary actions, record injuries and unemployment claims, how to do employment verification and COBRA maintenance.

HRM103: Employee Status Changes and HRM Control Programs

Learn how to terminate, rehire, or transfer employees, and set up controls for employee personal data. Understand hiring source codes and termination codes. Learn how to set up checklists, create disciplinary steps, and determine password security.

HRM104: HRM Custom Reports

Learn how to build standard reports, create one-line reports, and modify existing reports.

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MAC1 – Management Accounting Daily Procedures

*CPE Credits: 16.0**

Program level: Basic

Prerequisites: None

No advanced preparation is required.

Delivery method: Group Internet Based

Field of study: Accounting, Auditing, Computer Software and Applications

MAC101: Introduction to MAC and NAD

Learn about how the MAC application is organized, the open posting month feature, MAC drop, and the Name and Address application. Learn how to add customer records, create charge customer records, and find Accounts Receivable information.

MAC102: Posting and Viewing Accounting Detail

Learn how to use journal posting screens, add A/P purchases, auto-distribute expenses, display journal, schedule, and G/L detail, and add schedule extended notes.

MAC103: Controlling Journals and G/L Accounts

Learn about journal posting control screens, how to create a new journal variation and define prompted General Ledger accounts, General Ledger controls, create new General Ledger accounts, schedule a General Ledger account, and enter budget amounts for a General Ledger account.

MAC104: Posting Vehicle Purchases

Learn how to stock vehicles into inventory, and post vehicles into accounting.

MAC105: Posting Vehicle Sales (1 of 2)

Learn how to post a vehicle sale, display G/L detail, correct deal information, reopen a posted deal, and request Front-End Management reports.

MAC106: Posting Vehicle Sales (2 of 2)

Learn how to create G/L Distribution records, request a VIN listing of G/L Distributions, and find F&I field numbers.

MAC107: Cash Receipts

Learn how to receipt payments from accounts receivable customers, post the daily deposit, and create a new NAD record in Cash Receipts.

MAC108: Checkwriter and 1099 Reporting

Learn how to create and post a check, find accounts payable balances and invoices, create 1099 detail automatically, add manual 1099 detail, adjust manual 1099 detail, and how to create a new NAD record in Checkwriter and E-Payment.

MAC109: Reconciling Bank Statements

Learn how to clear detail for bank statement reconciliation, Automated Bank Reconciliation, reset cleared detail, and request bank reconciliation schedules.

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MAC2 – Periodic Accounting Procedures

*CPE Credits: 16.0**

Program level: Basic

Prerequisites: None

No advanced preparation is required.

Delivery method: Group Internet Based

Field of study: Accounting, Auditing, Computer Software and Applications

MAC201: Introduction to MAC and Accounts Receivable

Learn about how Management Accounting system integration functions, the open posting month feature, and MAC Drop. Learn how to review A/R detail, A/R credit history, find A/R accounts past due, and run A/R end of month statements.

MAC202: Batch Accounts Payable

Learn how to request a Batch Accounts Payable cycle, look up BAP detail, place vendors and invoices on hold, post the BAP cycle, and print BAP checks.

MAC203: Parts Accounting

Learn how to review, adjust, batch post, and control parts accounting. Learn how to use reports to find unbilled parts tickets to control inventory expenses, and view the adjusted parts invoices before batch posting to the G/L.

MAC204: Service Accounting

Learn how to review, adjust, batch post, and control service accounting. Learn how to use reports to find unbilled, completed repair orders, work in process, technician hours flagged for payroll purposes, and view/adjust service accounting before posting it to the G/L.

MAC205: NAD System and Reports

Learn how to create reports to meet your own specifications, prevent invoicing for parts and service customers based on NAD number, and display historical parts sales information for a given customer.

MAC206: Requesting and Maintaining DOC Reports

Learn how to request a Daily Operating Control report, view an Instant DOC on-screen, clear current amounts, easily change lines on the DOC to include or exclude accounts, add new accounts to lines on the DOC, and change forecast figures.

MAC207: Accounting Reports

Learn how to request and analyze journal and schedule reports, reconcile vehicle inventory, and request/analyze a Detail G/L report.

MAC208: Standard Entries and Handling Posting Errors

Learn how to create standard entries for expenses and depreciation, create online standard entries, analyze a sales analysis report, delete and void transactions, and reverse post a journal entry.

MAC209: End of Month Procedures

Learn about the current accounting status and important end-of-month dates. Learn how to prepare for MAC Drop, check to see if MAC Drop will run as scheduled, and request end-of-month jobs.

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MAC3 – Advanced Management Reports

*CPE Credits: 18.0**

Program level: Basic

Prerequisites: None

No advanced preparation is required.

Delivery method: Group Internet Based

Field of study: Accounting, Auditing, Computer Software and Applications

MAC301: Building Daily Operating Control Reports (Part 1)

Learn how to review a variety of reports that can be produced using DOCs. Learn steps in building a DOC, add keywords to a DOC, and define columns in a DOC.

MAC302: Building Daily Operating Control Reports (Part 2)

Learn how to map DOCs, add lines, print a DOC, complete Prior Year Comparison DOC, and troubleshoot DOCs.

MAC303: Standard DOCs & Instant DOCs

Learn how to build standard DOCs, instant DOCs, and restrict accounting reports.

MAC304: Percent of Base Comparison DOC

Learn about special content total level, and building Percent of Base Comparison DOC.

MAC305: Additional DOC Features

Learn about other DOC features, expenses on the DOC, listing DOC Control Records, mapping a 45-line DOC, and Restricting Accounting report.

MAC306: Financial Statement Reports (Part 1)

Learn about Financial Statement data sources and steps in building a Financial Report. Learn how to add base report information and define literals.

MAC307: Financial Statement Reports (Part 2)

Learn how to define Financial Statement Report Content, how to use basic commands such as GET, CAL, PRT, & RST, how to enter Financial Statement Report Lines, and print Financial Statement Reports.

MAC308: Financial Statement Literals and Storage Areas

Learn how to print from Schedule Recap totals, print from Alpha Storage, and learn about calculations with Working Storage Areas.

MAC309: Additional Financial Statement Arithmetic and Accumulators

Learn how to perform arithmetic functions in financial statements, how to use conditional statements, and how to enter personnel and financial statistical data. Learn aboutinterfacing accumulators with financial statements, and troubleshooting the Financial Statement.

MAC310: Account Analysis Reports

Learn how to build an Account Analysis Report, Field Accumulations, how to request Account Analysis Reports, and copy existing Account Analysis Reports.

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MACEOY – Accounting End-of-Year

*CPE Credits: 1.5**

Program level: Basic

Prerequisites: None

No advanced preparation is required.

Delivery method: Group Internet Based

Field of study: Accounting, Auditing

MACEOY101: Accounting End-of-Year

120 minutes

Learn about the steps that make closing December end-of-month accounting different from closing other months in the year. Learn how to request a 13th month financial statement, create 1099s, and enter auditor's adjustments.

**Reynolds and Reynolds is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of Accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.*

PAY – Payroll

*CPE Credits: 16.0**

Program level: Basic

Prerequisites: None

No advanced preparation is required.

Delivery method: Group Internet Based

Field of study: Auditing, Computer Software and Applications

PAY101: Introduction to Payroll

Learn about an introduction to payroll, steps to process a payroll cycle, company level display screens, Company Pay Calendar, and opening a cycle.

PAY102: Adding an Employee

Learn how to add Name and Address records. Learn about Payroll Employee Maintenance, Deduction Efficiency, how to create Employee Templates, and One-Time Deductions.

PAY103: Paycheck Solutions

Learn about Check Signer's Worksheet, paycheck requests, and Integrated PAY Downloads.

PAY104: Processing a Payroll Cycle

Learn about Trial or Worksheet processing, Full processing, and Payroll-general ledger interface.

PAY105: Additional Payroll Features

Learn about adjustments, voids and manual checks, on- line Instant checks, Miscellaneous checks, and Employee and Company Display screens.

PAY106: Payroll Reports

Learn how to build One-Line reports, request payroll and user reports, and clone reports.

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PRC – Purchase Requisition Control

*CPE Credits: 5.0**

Program level: Basic

Prerequisites: None

No advanced preparation is required.

Delivery method: Group Internet Based

Field of study: Auditing, Computer Software and Applications

PRC101: Introduction, NAD, and General PRC

Learn how to write, print, receipt, post invoices and set up vendors for PRC.

PRC102: Vehicle, Parts, and Sublet PRC

Learn how to add, receipts, and pre-post amounts to vehicle, parts, and sublet PRCs. Learn how to post invoices with a variance.

PRC103: PRC Inquiry, Reports, and Control Programs

Learn how to list historical purchase orders or all PRCs for a vendor, define a custom report, and void invoices. Learn about PRC control programs.

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Front End Classes

CAP – Credit Application

Prerequisites: None

CAP101: Credit Application

Learn about starting a credit application, adding employment history, adding references and creditors, adding bank accounts and mortgage information, viewing previously financed vehicles, and printing credit applications.

CRM – Customer Relationship Management

Prerequisites: None

CRM101: Customer Relationship Management Basics

Learn about the Customer Relationship Management (CRM) application, prospect life cycle, CRM folders, the CRM calendar, and various appointment displays.

CRM102: Appointments and Tasks

Learn about creating appointments for customers and personal items, delegating appointments to other representatives, tracking daily duties in the form of tasks, recognizing and acting on urgent tasks, and creating reminders for calendar items and tasks.

CRM103: Lead and Customer Management

Learn how to deal with unassigned leads and tasks, add new customer records, and manage existing customers and pending sales customers.

CRM104: CRM for the Front End and Fixed Operations

Learn how to view the status of existing deals from CRM, complete tasks added by the Sales Daily Work Plan, track vehicles available for demo drives, monitor delegated reservations and appointments using the “Watchdog” feature, add new service reservations from CRM, and check the status of existing service reservations.

CRM105: CRM Reports

Learn how to view on-screen customer traffic reports and monitoring prospect activity.

CRM106: Communications and Controls

Learn how to send letters, Emails, and text messages to customers, and set up programs that control how your Customer Relationship Management (CRM) application works.

FIM – F&I Menus – Presenter

Prerequisites: None

FIM101: F&I Menus - Presenter

Learn how to access and sell standard and customized menu packages to deals in the Finance and Insurance (FIN) application. This class also teaches you how to adjust selling price and other information in the menu package to give you extra flexibility while negotiating with your customers.

FIN – Deal Negotiation & Vehicle Sales

Prerequisites: None

FIN101: Introduction & Starting Finance Deals

Learn about the Finance and Insurance application, the functions of Sales and F&I Managers in the deal process, adding a quote deal, adding a real deal, looking up a deal, converting quote deals to real deals, converting real deals to quote deals, and displaying lists of open, closed, and posted deals.

FIN102: Deal Subscreens

Learn how to check the status of deal subscreens to determine what information is missing from the deal, identify the information contained in each deal subscreen, enter information in each deal subscreen, and use Navigator Mode to quickly complete the required deal subscreens. Learn about rating and booking products using the Provider Exchange Network.

FIN103: Negotiating Finance Deals

Learn how to use flexible fields to change amounts in the deal, use function keys to perform quick changes in the deal, perform rollbacks in a finance deal, change the deal type, calculate balloon payments, sell off-the-truck vehicles, and sell on-order vehicles.

FIN104: Lease Deals

Learn how to start a lease deal, identify what information should be entered in each lease screen, mark options as capitalized or due-on-delivery, enter a due-on-delivery dealer add, residualize an option at a different rate, prepay excess mileage charges, perform rollbacks on lease deals, use the Minimizer feature, and use lease-specific rollbacks.

FIN105: Finalizing Deals & Additional Tools

Learn how to print the necessary forms for each deal, validate the buyer and co-buyer, mark a delivery, close a deal, re-open a deal, use display screens to find basic information such as financial data, dates, and comments on deals, start fleet or wholesale deals, clone deals, prospect multi-quote, and aftermarket/chargeback deals.

FGM – Finance General Manager

Prerequisites: FIN – Deal Negotiation & Vehicle Sales

FGM101: General F&I Set Up

Learn how to add a vehicle salesperson record, define what information defaults into your deal, designate required entries for each type of deal, set up commissions and profit formulas, workstation/printer relationships, and customize the *Prospect Multi-Quote* screen.

FGM102: Menus and Advanced Controls

Learn how to set up and maintain F&I Menu Selling (FIM), define general data for each lienholder, define general information for each lessor, and use Lease Residual Tables (LRT).

FGM103: Requesting & Analyzing Front-End Reports

Learn about printed front-end reports including Spot Delivered but Not Finalized, Delivered but Not Posted, Source of Financing, Source of Leasing, Manager's Gross and Penetration, F&I Summary, and Deals Sold Log. Learn how to request a Sales Report, request Instant Front-End reports, and add and look up an aftermarket deal.

FMB – Forms Building

Prerequisites: FIN – Deal Negotiation & Vehicle Sales

FMB100: Forms Building

Course Classroom Instructed – 1 day

Learn about forms display programs, measuring the form, identifying necessary data, choosing edit types, using data logic testing, using Auto-Print, requesting a forms control record listing, printing reports, assigning priority rankings, cloning forms, test printing a form, adjusting data on a form, steps to building a form, adding a forms master record, and troubleshooting.

FRM – Front-End Management

Prerequisites: FIN – Deal Negotiation & Vehicle Sales

FRM101: FRM Introduction, Report Library, and Viewing Reports

Learn about the Front End Management system overview and integration. Learn how to process FRM reports, request instant reports, and forecast future sales.

FRM102: Instant Reports

Learn how to modify instant reports, create Summary reports, create VIN tables, change report legends, and print report definition records.

FRM103: Modifying Instant Report Columns

Learn how to find field numbers, add and change report columns, and delete report columns.

This session has an additional prerequisite of FRM102 or experience using FIN.

FRM104: Building Printed Reports

Learn how to create printed sales reports. Learn how to define report selections, summary report options, legend options, and report selects.

FRM105: Modifying Printed Report Columns

Learn how to find field numbers, define report columns and lines, and add, change, and delete report columns on printed reports.

This session has an additional prerequisite of FRM104 or experience using FIN.

FRM106: Sales Motivation Board, We-Owes, and Customer Follow-up

Learn how to define Sales Motivation Board columns, request the Sales Motivation Board report, request the We-Owe Analysis report, and Outbound Correspondence and Communication (OCC).

This session has an additional prerequisite of FRM102 and FRM105 or experience using FIN.

LLC – Lienholder and Lessor Controls

Prerequisites: None

LLC101: Lienholder and Lessor Controls

Learn how to set up and maintain F&I Menu Selling (FIM), define general data for each lienholder, define general information for each lessor, and use Lease Residual Tables (LRT).

SPC – Sales Prospect Control

Prerequisites: None

SPC101: Introduction to Sales Prospect Control

Learn about an overview of the Sales Prospect Control process, Sales Prospect Control features, and how to record prospect information.

SPC102: SPC Screens and Credit Bureau Inquiries

Learn about prospect maintenance, how to manage your prospects, and Credit Bureau Inquiries (CBI).

SPC103: The Daily Work Plan

Learn how to view the On-Line Daily Work Plan on-screen, and request the Daily Work Plan.

SPC104: Sales Management

Learn how to establish sales procedures, manage prospects who don’t buy, handle turnover and “orphaned” prospects. Learn about management sections of the Daily Work Plan, Instant Traffic Reports (SPI), and how to set up salesperson objectives, and Queries (QRY).

VIN – Vehicle Inventory

Prerequisites: None

VIN101: Introduction to VIN and Vehicle Maintenance

Learn how to search for vehicle records, manually add vehicle records, change vehicle records, enter vehicle notes, and post a vehicle to accounting.

VIN102: Managing Your Inventory

Learn how to view on-order vehicle information, receive on-order vehicles, add a used vehicle record, request the VIN/MAC Reconciliation Report, reconcile VIN and MAC records, and customize My Favorites.

VIN103: Vehicle Options

Learn how to create model specific options, create options for all vehicles, change base vehicle data, and add an option package.

VIN104: Vehicle Searches and Managerial Tools

Learn how to find a vehicle for a customer, display and print a window sticker, display the repair order history of a vehicle, put a vehicle into hold status, and maintain prices and packs.

VIN105: Vehicle Inventory Reports

Learn how to set up a vehicle inventory listing, create a customized vehicle inventory report, and request a vehicle inventory listing.

WEO – The POWER of We-Owes

Prerequisites: None

WEO101: The POWER of We-Owes

Learn how to add we-owes in the Finance and Insurance (FIN) system, indicate and flagg we-owes in the Service drive, keep track of outstanding we-owes, set up dealership contacts and expiration dates, control we-owe accounting for both vehicle sales and fixed operations, and build we-owe forms for customers.

Fixed Operations Classes

CSH – Customer Service History Reports

Prerequisites: None

CSH101: Customer Service History Reports

Learn how to increase your service and sales business from repeat customers, by creating the following reports in this course: Vehicles Without Extended Service Contracts, Service Forecasting, Potential Vehicle Repeat Sales by Model, Vehicles Sold Here – Never Serviced, Vehicles Serviced Here – Never Sold, Vehicles Not Serviced for Six Months, Customers With and Without Emails, and Market Analysis by Zip Code and Model.

CSI – Customer Satisfaction Index

Prerequisites: None

CSI101: CSI Report Cards

Learn about an overview of Customer Satisfaction Index, and an overview of the report card and complaint process. Learn how to review the Daily Work Plan display, and answering Service, Prospect, and Delivery report cards.

CSI102: Handling CSI Complaints

Learn how to add complaints from report cards, print complaints, add complaints manually, take actions on complaints, and resolve/close complaints.

CSI103: CSI Reports and Control Screens

Learn how to review the CSI Daily Work Plan, the Trend Analysis and Satisfaction reports, control screen set up options, and how to set up department codes and source codes.

HHD – Household/Driver Tracking

Prerequisites: None

HHD101: Household/Driver Tracking

Learn about Household, Driver and Vehicle records. Learn how to provide excellent customer service in the store, over the phone, through the mail, and 24/7 across the Internet by using HHD, maintaining Household records and correcting exceptions.

PIC – Parts Inventory Control

Prerequisites: None

PIC101: Adding Parts Records to Your Inventory

Learn about the inventory card, how to manually add, change, and delete parts from your inventory. Learn about the Watch, Non-Stock, Zero Guide, and Order Suspension systems.

PIC102: Stock Order Process (Part 1)

Learn how to prepare for the stock order, stock order outline, request PIC Processing, adjust the stock order, place a part on order suspension, and transmit the stock order.

PIC103: Stock Order Process (Part 2)

Learn how to receipt and cancel the stock order.

PIC104: PIC Processing Reports

Learn how to analyze PIC Processing reports, and understand tasks, procedures and reports in My Favorites.

PIC105: Transaction Codes and Displays

Learn about Inventory Transaction Codes, the Online Transaction (LOG) System, requesting reports in LOG, Part Information and Manufacturer Price File Displays, and Part Supersessions.

PIC106: Parts Financial Analysis and Management Inventory Analysis Reports

Learn about reviewing the information contained in the Parts Financial Analysis report, and creating and requesting Management Inventory Analysis reports

PIC107: Manufacturer Returns, Price Match, and Sourcing Parts

Learn about an overview of the parts return process and the process to update parts prices from the manufacturer’s price tape. Learn about the available options for sourcing/warehousing parts.

PIC108: Inventory Controls and Guide Calculations

Learn about inventory controls available and guide calculations.

PIN – Parts Invoicing

Prerequisites:None

PIN101: Parts Invoicing (Part 1)

Learn how to add parts to a project, print invoices, start a cash ticket for a charge customer, change an invoice credit type, add the same part more than once on a project, void a project, use magic words, sell parts without valid part numbers, print picking tickets, and force prices on a project.

PIN102: Parts Invoicing (Part 2)

Learn how to handle core charges, change headings on an invoice, override credit limits, quote parts without relieving inventory, print quotes, roll quote to real invoices, create credit invoices, and create reversal invoices.

PIN103: NAD, Online Sales Analysis, and Accounting

Learn how to adding NAD records, establish credit limits for customers, determine parts pricing for customers, add a parts salesperson, add a new NAD record while adding a project, display 12 months of sales history for a customer, establish a wholesale compensation customer, review the wholesale compensation report, parts accounting procedures, and Online Sales Analysis.

PIN104: Part Inquiries and Displays

Learn how to perform Short Inquiries, set up a Short Inquiry, change a short inquiry into a project, and set up My Favorites.

PIN105: Back Counter Sales

Learn how to sell parts to a repair order, mark warranty parts as returned, display repair order information, move parts to different labor lines, open labor lines in the Parts (PTS) application, open and close sublets, and learn about the Service Drive Fill Rate report.

PIN106: Special Orders

Learn how to take a deposit for a special order, designate a part from an existing project as special order, manually add a special order to an order, receipt a special ordered part, sell a special ordered part, cancel a special order, set up and request SPO notification cards, set up and request SPO reports, clone SPO reports, and SPO control screens.

PIN107: Parts Kits and Pricing Calculations

Learn how to build a parts kit, set up parts with fixed prices, sell parts kits, attach a parts kit to a part number, track multiple supersessions using kits, clon parts kits, review reports on parts kits, price calculations, set up calculation codes, and set up matrix pricing.

PIN108: Reports and Control Options

Learn how to build, request and review invoicing reports, and discuss invoicing control options available.

PPI – Parts Physical Inventory

Prerequisites: None

PPI101: Parts Physical Inventory

120 minutes

Learn about pre-inventory reporting and preparation, opening, recording, and closing the counts, entering handwrites, and post-inventory reports and follow up.

SDS – Service Department Scheduling

Prerequisites: None

SDS101: Introduction to SDS and Dispatching Basics

120 minutes

Learn about an overview of the Service Department Scheduling (SDS) application, the process used to begin a repair order, basics of dispatching, and using the Service Department Scheduling application to find and complete jobs.

SDS102: Advanced Dispatching Functions

Learn how to handle special situations, place jobs on hold, and assign a job to a technician.

SDS103: Skills, Technicians, Shop Loading, and Priority Points

120 minutes

Learn how to review skill's information, and maintain technician records. Learn about the Shop Loading Status screen, and how to discuss priority points and how they affect the order in which tags are dispatched.

SDS104: SDS Display Screens

Learn about the following display screens and the information they display: Overview, Dispatch Tag Inquiry, Advisor Dispatch Log, Advisor Dispatch Alarms, Dispatching Overrides, Daily Dispatch Recap, and Tech Statistic Data.

SDS105: Service Reservations

Learn about Service Reservations, reservation availability, reviewing the recommended daily procedures, and setting up the My Favorites list.

SDS106: SDS Controls

Learn how to customize your SDS application.

SIN1 – Vehicle Service

Prerequisites: None

SIN101: Customer Pay Repair Orders

120 minutes

Learn about Vehicle Service application overview, repair order process, using operation codes for quick services, and adding labor lines for major mechanical work.

SIN102: Warranty, ESC, and Internal Repair Orders

Learn how to work with multiple forms of payment (i.e. Warranty, Extended Service Contract, and Internal), add options to new vehicles and updating their cost, copy internal repair orders to save time, recondition trade-in vehicles and update their costs, manage We-owes (Due-bills) on vehicles, and perform a Manufacturer Inquiry.

SIN103: Flagging Customer Pay and Warranty Pay ROs

Learn how to flag quick service operations as well as major mechanical work, look up the status of flagged lines, understand how warranty work is flagged, display parts sold to a repair order, and back-flag repair orders.

SIN104: Flagging ESC and Internal Repair Orders

Learn how to flag Extended Service Contract repair orders, update vehicle inventory records with dealer-added accessories, handle work that must be written off, handle the completion of We-owes (Due-bills), and use the *Overview* window.

SIN105: Invoicing Repair Orders

Learn how to provide customers with quotes or estimates for work completed, define Preliminary and Final Billing, handle changes in method of payment (i.e. cash to credit), add pre-defined discounts, correct errors in invoicing, and void repair orders.

SIN106: Advanced Invoicing

Learn how to handle invoices with multiple pay types, manage deductibles on extended service contracts, apply discounts with greater flexibility, and customize My Favorites.

SIN107: Quick Service Write up, Multiple Labor Categories, and Sublets

Learn how to add additional charges such as towing charges, add sublet work, chain repair orders, and handle quick service operations using the Quick Service Write Up application.

SIN108: Special Situations

Learn how to manage possible rechecks in your service drive, flag multiple techs on one labor line, add or delete labor lines while flagging, unflag labor lines, use the Advisor Log Sheet, and indicate a labor line as Recommended Not Done.

SIN109: Reservations

Learn how to create reservations and convert them to repair orders, customize your reservation system, pre-print reservations to save time on the service drive, and request a reservations report.

SIN2 – Advanced Vehicle Service

Prerequisites: SIN1 – Vehicle Service

SIN201: Service Management Reports (Part One)

Learn how to request and analyze Management Reports such as Work-in-Process, Unbilled But Closed Repair Orders, Recheck Analysis, and Operation Analysis.

SIN202: Service Management Reports (Part Two)

Learn how to request and analyze Service Management Reports such as Profit and Performance, Shop Flow Analysis, and Service Accounting Data, view Instant DOCs, review Service Daily Work Plan, and Warranty Management System.

SIN203: Discounts and Policy Adjustments

Learn how to review gross profit, add parts and labor discounts, make policy adjustments, and report discounts and policy adjustments.

SIN204: Determining Technician Pay

Learn how to add tech records, set up payroll cutoff dates, analyze Tech Hours Flagged reports, and add Service Advisor records.

SIN205: Dealer Operation Codes

Learn how to set up, sell, and merchandise operation codes.

SIN206: Service Specials

Learn how to set up service special pricing, create State Inspection operation codes, and request an Operation Code report.

SIN207: Household/Driver Tracking

Learn how to use Household, Driver, and Vehicle records, set up households with owner or fleet maintenance NAD numbers, and correct exceptions in Household records.

SIN208: Customer History Reports

Learn how to build and request Customer History reports, and maintain Customer Service History.

SIN209: Customizing Your System

120 minutes

Learn how to define standard service procedures, define password access, set up distribution types, and create pay type/invoice type controls.

SPO – Parts Special Orders

Prerequisites: None

SPO101: Parts Special Orders

120 minutes

Learn how to take a deposit for a special order, designate a part from an existing project as special order, manually add a special order to an order, receipt and sell a special ordered part, cancel a special order, set up and request SPO notification cards, set up and request SPO reports, clone SPO reports, and SPO control screens.

SRP – Service Reports

Prerequisites: None

SRP101: Service Reports

120 minutes

Learn how to request and analyze the most important and most frequently used service reports. Learn about reports outside of the service applications that can help find information about the Service department.

VRC – Vehicle Report Card

Prerequisites: None

VRC101: Vehicle Report Card

120 minutes

Learn how to add a VRC to a repair order, set up your system so that a VRC is automatically added to a repair order, use VRC in a repair order, use Service Upsell Tracker (SUT) with VRC, suggest repairs with an estimated pricing to a customer, create your own customizable VRC, and produce a report to manage and monitor VRC use.

SUV – Service Upsell and Vehicle Report Card

Prerequisites: None

SUV101: Service Upsell Tracking

120 minutes

Learn how to monitor technicians' recommendations and advisors' closing ratios on upsell items, add parts information to upsell items to give accurate estimates to your customers, track which technicians are recommending the most additional work and helping your bottom line, and add technician recommendations from either Service (SVC) or Service Department Scheduling (SDS).

SUV102: Vehicle Report Card

120 minutes

Learn how to add a VRC to a repair order, set up your system so that a VRC is automatically added to a repair order, use VRC in a repair order, using Service Upsell Tracker (SUT) with VRC, suggest repairs with an estimated pricing to a customer, create your own customizable VRC, and produce a report to manage and monitor VRC use.

Systems Classes

GEN – General Manager

Prerequisites: None

GEN101: General Manager

120 minutes

Learn how to view summary emails, review inventory, new and used vehicles sales department, F&I performance, service department, parts department, accounting department, payroll, and security and education reports. Learn how to analyze deal receivables, and an overview of the Dashboard (DSH) application.

OCC – Outbound Correspondence & Communication

Prerequisites: One other course must be completed

You must have used POWER for six months at your dealership.

OCC101: Introduction to OCC

Learn the steps to create an OCC Email, letter, or text message, and a description of each source application.

OCC102: Marketing Toolbox

Learn how to search for and add source names to templates, modify existing templates, create and define templates, and clone templates.

This session has an additional prerequisite of OCC101.

OCC103: Creating OCC Documents

Learn how to create text and HTML Email layout files using Marketing Toolbox. Discuss of third party HTML and text editors, and create layout files using Microsoft® World for letters.

This session has an additional prerequisite of OCC101 and OCC102.

OCC104: Publishing Emails, Letters, and Text Messages

Learn about downloading OCC from Software Manager, adding OCC to your Startup folder, determining with the last OCC job was run, working with templates on the Application server, and creating SMS text messages.

This session has an additional prerequisite of OCC101 and OCC102.

OCC105: Requesting Emails, Letters, and Text Messages

Learn how to test templates, create manifests, request Emails, letters, and text messages, and add an Auto-Run report. Learn about customer privacy and Outbound Correspondence and Communication – Instant (OCI).

This session has an additional prerequisite of OCC101 and OCC102.

QRY - Queries

Prerequisites: None

QRY101: Queries

Learn how to add a query and select the database used, modify a query, add columns, and use selection criteria, clone queries, export query information, and learn how Queries (QRY) integrates with other applications.

SEC – Security Profiles Advanced Topics

Prerequisites: None

SEC101: Security Profiles Advanced Topics

Learn how to maintain groups of passwords to quickly change access, compare security profiles, search passwords for access to specific items, and Global Security items.

SYS – System Administrator

Prerequisites: None

SYS101: System Integration and Hardware

Learn about the system administrator duties, know the Reynolds and Reynolds company structure, identify the purpose of the hardware components of the computer system, understand how LAN systems work, and how serial systems work.

SYS102: Understanding Workstations and Dealer Communication

Learn how to maintain system records and troubleshoot equipment. Learn about printer maintenance and network emails.

SYS103: System Software and Auto Reports

Learn about internal programs, look at the System Master Control Log, perform software updates and Initial Program Loads. Learn about Electronic Documentation Viewer (EDV) and reporting in the system.

SYS104: Enterprise Report Management

Learn how to manage reports in the system, change job priorities, and save reports to the Document Retrieval (DOC) system or to your PC.

SYS105: User Security and Training

Learn how to maintain records and passwords for all employees. Learn about training for new employees.

SYS106: User Groups and Troubleshooting security

Learn how to maintain user groups, compare access between employees and/or user groups, and request POWER Security Reports.

SYS107: Tape Library, Backups, and Reorgs

Learn how to maintaining the tape library, know the different types of tape library reports, request backups in the system, and understand database layouts. Learn about reorgs and how they are requested, and learn how to check database statuses.

UPS – User Programming System

Prerequisites: None

UPS101: Introduction and Layouts

Learn how UPS works, define record, fields, layouts, and datanames, and how to find field numbers.

UPS102: Basic Reports

Learn how to build a basic UPS report, understand edit types and selection logic, determine what prints, and run UPS reports.

UPS103: Advanced Reflexes (Part 1)

Learn how to combine multiple databases, use Working Storage, utilize compute logic and literal equate logic, and create parameters.

UPS104: Advanced Reflexes (Part 2)

Learn about Complex select logic, multiple selection criteria, and defining legends.

UPS105: Miscellaneous Topics

Learn how to display report statistics, create follow-up letters, print mailing labels, clone reports, and set up password security.

UPS106: Display Screens

Learn how to determine screen layout, create a customized display screen, and view customized displays.