

TRAINER

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AGENDA SUMMARY

Monday & Tuesday | ½ Day Training

Demo System Setup

Lab #1: Basic AP

Create Document Types, Batch Type, DFD

User Creation and Access

Create Batches

Perform Data Verify

Lab #2: Advanced AP Config + Lookups

Customize Document Form Definition

Various Formula Types

Mappings

Configuring Database Lookup

Basic Customer Configuration Setup

Wednesday & Thursday | ½ Day Training

Lab #3: Document Separation & Classification

Configure Document Separation

Classification vs Document Separation vs

Modeless

Specific Vendor Definitions

Database Lookups

Lab #4: Advanced Forms

Create DFD's for Each Document Type

Formulas

Email and Folder Input

Support/Troubleshooting

Detailed Agenda*

- Four 5-hour sessions
- Coffee breaks every ~40 min to get caught up if needed
- You'll get a demo login

Four labs total

1. Basic AP
2. Advanced AP + SQL Lookups
3. Classification
4. Forms

Monday | 8:00am – 1:00pm

Welcome and Introductions – Mike Knowles (MK)

Verify that all users have the demo documents/package for training & can access website

Lab #1: Seeing is Believing

- User Creation and Access
- Create a DFD from Scratch
- Configure a Document Type
- Create a Batch Type/Review Settings and Options
- Process some Invoices/Through Create Batch Screen
- Optional (Run through Your Invoices to see how they do).
- Discussion on what Documents you might be able to build right now

Tuesday | 8:00am – 1:00pm

Lab #2: Building a Solid Foundation

- Mappings/Previews/Lock Training Options
- Line item and table configuration
- Learn to apply various types of formulas
- Configure a database lookup
- Practice Teaching Smart Capture Line Item Capture

Wednesday | 8:00am – 1:00pm

Lab #3: Building a Solid Foundation

- Discuss the difference between Document Separation and Document Classification
- The New Modeless Classification
- Configure Document Separation
- Learn when to Apply Classification vs Document Separation.
- Utilizing Specific Versions to Handle Vendor specific Items
- Database Lookups.

Thursday | 8:00am – 1:00pm

Lab #4: Mastering the Principles

- How to use Email Import
- How to use File Import
- Create DFD's for Each Document Type
- Formulas, Formulas and More Formulas!
- How do you Capture your own Invoices?
- Support Basics
 - Log File Location
 - Artifact Collection
 - Support Resources

** Breaks are scheduled at approximately 10:00-10:15. Topics and timing are subject to change.*