

# TRAINING MANUAL FOR SALES STAFF

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# **Training Manual Template Excel**

**Jon-Chao Hong** 

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Tools 1 Changing the Company Info and Posting Methods 2 Posting and Unposting 3 Memorized Transactions 4 Using the Purge Wizard 5 Using the Year End Wizard 6 Data Verification 7 Updating Encryption 8 Archiving a Company 9 Using and Restoring an Archive Company 10 Sharing a Company Using Remote Data Access 11 Connect to a Shared Company Using Remote Data Access 12 Managing User and File Access Using Remote Data Access 13 Finding Transactions 14 Sync Data in Microsoft 365 15 Email Setup 16 Writing Letters Reporting 1 The Cash Flow Manager 2 The Collection Manager 3 The Payment Manager 4 The Financial Manager 5 Find on Report 6 Previewing and Printing Preset Reports 7 Report Groups 8 Modifying Reports 9 Exporting Reports to Excel 10 Importing and Exporting Data 11 Exporting Reports to PDF 12 Modifying Task Window Screen Templates 13 Modifying Forms The Internal Accounting Review 1 Using the Internal Accounting Review Action Items 1 Events 2 To Do Items 3 Alerts Options 1 Changing Global Options 2 Changing the System Date Assets and Liabilities 1 Assets and Liabilities 2 Creating an Other Current Assets Account 3 Subtracting Value from an Other Current Assets Account 4 Creating a Fixed Assets Account 5 Accumulated Depreciation 6 Liability Accounts 7 Paying on a Long Term Liability 8 Equity Help 1 Using Search and Help Topics 2 Using the Sage 50 User's Guide **Microsoft Outlook 2019** Training Manual Classroom in a Book TeachUcomp, 2020-10-26 Complete classroom training manual for Microsoft Outlook 2019 177 pages and 101 individual topics Includes practice exercises and keyboard shortcuts You will learn how to create and manage contacts use advanced email techniques manage and use the calendar use tasks create groups use the journal and much more Topics Covered CHAPTER 1 GETTING ACQUAINTED WITH OUTLOOK 1 1 The Outlook Environment 1 2 The Title Bar 1 3 The Ribbon 1 4 The Quick Access Toolbar 1 5 Touch Mode 1 6 The Navigation Bar Folder Pane Reading Pane and To Do Bar CHAPTER 2 MAKING CONTACTS 2 1 The Contacts Folder 2 2 Customizing the Contacts Folder View 2 3 Creating Contacts 2 4 Basic Contact Management 2 5 Printing Contacts 2 6 Creating Contact Groups 2 7 Categorizing Contacts 2 8 Searching for Contacts 2 9 Calling Contacts 2 10 Mapping a Contact s Address CHAPTER 3 EMAIL 3 1 Using the Inbox 3 2 Changing the Inbox View 3 3 Message Flags 3 4 Searching for Messages 3 5 Creating Addressing and Sending Messages 3 6 Checking Message Spelling 3 7 Setting Message Options 3 8 Formatting Messages 3 9 Using Signatures 3 10 Replying to Messages 3 11 Forwarding Messages 3 12 Sending Attachments 3 13 Opening Attachments 3 14 Ignoring Conversations CHAPTER 4 THE SENT ITEMS FOLDER 4 1 The Sent Items Folder 4 2 Resending Messages 4 3 Recalling Messages CHAPTER 5 The Outbox Folder 5 1 Using the Outbox 5 2 Using the Drafts Folder CHAPTER 6 USING THE CALENDAR 6 1 The Calendar Window 6 2 Switching the Calendar View 6 3 Navigating the Calendar 6 4 Appointments Meetings and Events 6 5 Manipulating Calendar Objects 6 6 Setting an Appointment 6 7 Scheduling a Meeting 6 8 Checking Meeting Attendance Status 6 9 Responding to Meeting Requests 6 10 Scheduling an Event 6 11 Setting Recurrence 6 12 Printing the Calendar 6 13 Teams Meetings in Outlook 6 14 Meeting Notes CHAPTER 7 Tasks 7 1 Using Tasks 7 2 Printing Tasks 7 3 Creating a Task 7 4 Setting Task Recurrence 7 5 Creating a Task Request 7 6 Responding to Task Requests 7 7

Sending Status Reports 7 8 Deleting Tasks CHAPTER 8 Deleted Items 8 1 The Deleted Items Folder 8 2 Permanently Deleting Items 8 3 Recovering Deleted Items 8 4 Recovering and Purging Permanently Deleted Items CHAPTER 9 GROUPS 9 1 Accessing Groups 9 2 Creating a New Group 9 3 Adding Members to Groups and Inviting Others 9 4 Contributing to Groups 9 5 Managing Files in Groups 9 6 Accessing the Group Calendar and Notebook 9 7 Following and Stop Following Groups 9 8 Leaving Groups 9 9 Editing Managing and Deleting Groups CHAPTER 10 The Journal Folder 10 1 The Journal Folder 10 2 Switching the Journal View 10 3 Recording Journal Items 10 4 Opening Journal Entries and Documents 10 5 Deleting Journal Items CHAPTER 11 Public Folders 11 1 Creating Public Folders 11 2 Setting Permissions 11 3 Folder Rules 11 4 Copying Public Folders CHAPTER 12 Personal Private Folders 12 1 Creating a Personal Folder 12 2 Setting AutoArchiving for Folders 12 3 Creating Private Folders 12 4 Creating Search Folders 12 5 One Click Archiving CHAPTER 13 Notes 13 1 Creating and Using Notes CHAPTER 14 Advanced Mailbox Options 14 1 Creating Mailbox Rules 14 2 Creating Custom Mailbox Views 14 3 Handling Junk Mail 14 4 Color Categorizing 14 5 Advanced Find 14 6 Mailbox Cleanup CHAPTER 15 OUTLOOK OPTIONS 15 1 Using Shortcuts 15 2 Adding Additional Profiles 15 3 Adding Accounts 15 4 Outlook Options 15 5 Using Outlook Help CHAPTER 16 DELEGATES 16 1 Creating a Delegate 16 2 Acting as a Delegate 16 3 Deleting Delegates CHAPTER 17 SECURITY 17 1 Types of Email Encryption in Outlook 17 2 Sending Encrypted Email Excel Power Pivot & Power Ouery For Dummies Michael Alexander, 2016-04-04 A guide to PowerPivot and Power Query no data cruncher should be without Want to familiarize yourself with the rich set of Microsoft Excel tools and reporting capabilities available from PowerPivot and Power Query Look no further Excel PowerPivot Power Query For Dummies shows you how this powerful new set of tools can be leveraged to more effectively source and incorporate big data Business Intelligence and Dashboard reports You ll discover how PowerPivot and Power Query not only allow you to save time and simplify your processes but also enable you to substantially enhance your data analysis and reporting capabilities Gone are the days of relatively small amounts of data today s data environment demands more from business analysts than ever before Now with the help of this friendly hands on guide you ll learn to use PowerPivot and Power Query to expand your skill set from the one dimensional spreadsheet to new territories like relational databases data integration and multi dimensional reporting Demonstrates how Power Query is used to discover connect to and import your data Shows you how to use PowerPivot to model data once it s been imported Offers guidance on using these tools to make analyzing data easier Written by a Microsoft MVP in the lighthearted fun style you ve come to expect from the For Dummies brand If you spend your days analyzing data Excel PowerPivot Power Query For Dummies will get you up and running with the rich set of Excel tools and reporting capabilities that will make your life and work easier Crystal Reports Training Manual Classroom in a Book TeachUcomp, 2013-10-27 Complete classroom training manuals for Crystal Reports Two manuals Introductory and Advanced in one book 226 pages and 118 individual topics Includes practice exercises and keyboard shortcuts You will learn all about how to establish data connections create complex

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Mapping Fields Financial Modeling in Excel For Dummies Danielle Stein Fairhurst, 2017-04-24 Make informed business decisions with the beginner's guide to financial modeling using Microsoft Excel Financial Modeling in Excel For Dummies is your comprehensive guide to learning how to create informative enlightening financial models today Not a math whiz or an Excel power user No problem All you need is a basic understanding of Excel to start building simple models with practical hands on exercises and before you know it you ll be modeling your way to optimized profits for your business in no time Excel is powerful user friendly and is most likely already installed on your computer which is why it has so readily become the most popular financial modeling software This book shows you how to harness Excel s capabilities to determine profitability develop budgetary projections model depreciation project costs value assets and more You ll learn the fundamental best practices and know how of financial modeling and how to put them to work for your business and your clients You ll learn the tools and techniques that bring insight out of the numbers and make better business decisions based on quantitative evidence You ll discover that financial modeling is an invaluable resource for your business and you ll wonder why you ve waited this long to learn how Companies around the world use financial modeling for decision making to steer strategy and to develop solutions This book walks you through the process with clear expert guidance that assumes little prior knowledge Learn the six crucial rules to follow when building a successful financial model Discover how to review and edit an inherited financial model and align it with your business and financial strategy Solve client problems identify market projections and develop business strategies based on scenario analysis Create valuable customized templates models that can become a source of competitive advantage From multinational corporations to the mom and pop corner store there isn t a business around that wouldn't benefit from financial modeling No need to buy expensive specialized software the tools you need are right there in Excel Financial Modeling in Excel For Dummies gets you up to speed guickly so you can start reaping Uganda International Monetary Fund. Fiscal Affairs Dept., 2018-06-25 This Technical Assistance the benefits today Report discusses the initiation of the stock taking of the public investment program in Uganda This stock taking will provide a basis for better budgeting by providing information on the existing multi year project commitments and the incremental recurrent costs for operation and maintenance of the assets delivered It will also identify a basic information structure for each project and subsequently collect a data baseline providing a foundation for more robust project monitoring It will aid the management of the overall project portfolio By identifying the scale of existing multi annual commitments it will avoid adding projects to the investment pipeline which cannot be financed under the Medium Term Expenditure Framework

New Technology in Education and Training Jon-Chao Hong, 2024-08-14 This book presents the selected papers of the 5th International Conference on Advance in Education and Information Technology AEIT 2024 which was held in Nagoya Japan 2024 January 5 7 With a worldwide increase in technology enhanced learning in school and industry settings there has been a progressive increase in the implementation of new technology in education and training Issues surrounding teaching

approaches classroom management and the evaluation of learning effectiveness are now considered of global concern Topics and technical areas covered include but are not limited to Online Virtual Laboratories Classroom and Laboratory Integration Managed Learning Environments MLEs Learning Management Systems LMS Collaborative Virtual Environments CVEs and Experiences in Educational Serious Games This book serves as a useful reference for early career scholars academics entrepreneurs and professionals who are working in the field of implementing new technology in education and training

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Writing Checks 3 Writing a Check for Inventory Items 4 Printing Checks 5 Transferring Funds 6 Reconciling Accounts 7 Voiding Checks 8 Adding Bank Feeds 9 Reviewing Bank Feed Transactions 10 Bank Feed Rules 11 Disconnecting Bank Feed Accounts Paying Sales Tax 1 Sales Tax Reports 2 Using the Sales Tax Payable Register 3 Paying Your Tax Agencies Reporting 1 Graph and Report Preferences 2 Using QuickReports 3 Using QuickZoom 4 Preset Reports 5 Modifying a Report 6 Rearranging and Resizing Report Columns 7 Memorizing a Report 8 Memorized Report Groups 9 Printing Reports 10 Batch Printing Forms 11 Exporting Reports to Excel 12 Saving Forms and Reports as PDF Files 13 Comment on a Report 14 Process Multiple Reports 15 Scheduled Reports Using Graphs 1 Using Graphs 2 Company Snapshot Customizing Forms 1 Creating New Form Templates 2 Performing Basic Customization 3 Performing Additional Customization 4 The Layout Designer 5 Changing the Grid and Margins in the Layout Designer 6 Selecting Objects in the Layout Designer 7 Moving and Resizing Objects in the Layout Designer 8 Formatting Objects in the Layout Designer 9 Copying Objects and Formatting in the Layout Designer 10 Adding and Removing Objects in the Layout Designer 11 Aligning and Stacking Objects in the Layout Designer 12 Resizing Columns in the Layout Designer Estimating 1 Creating a Job 2 Creating an Estimate 3 Duplicating Estimates 4 Invoicing From Estimates 5 Updating Job Statuses 6 Inactivating Estimates 7 Making Purchases for a Job 8 Invoicing for Job Costs 9 Using Job Reports Time Tracking 1 Tracking Time and Printing a Blank Timesheet 2 Weekly Timesheets 3 Time Enter Single Activity 4 Invoicing from Time Data 5 Using Time Reports 6 Tracking Vehicle Mileage 7 Charging Customers for Mileage Payroll 1 The Payroll Process 2 Creating Payroll Items 3 Setting Employee Defaults 4 Setting Up Employee Payroll Information 5 Creating Payroll Schedules 6 Creating Scheduled Paychecks 7 Creating Unscheduled Paychecks 8 Creating Termination Paychecks 9 Voiding Paychecks 10 Tracking Your Tax Liabilities 11 Paying Your Payroll Tax Liabilities 12 Adjusting Payroll Liabilities 13 Entering Liability Refund Checks 14 Process Payroll Forms 15 Tracking Workers Compensation Using Credit Card Accounts 1 Creating Credit Card Accounts 2 Entering Credit Card Charges 3 Reconciling and Paying Credit Cards Assets and Liabilities 1 Assets and Liabilities 2 Creating and Using an Other Current Asset Account 3 Removing Value from Other Current Asset Accounts 4 Creating Fixed Asset Accounts 5 Creating Liability Accounts 6 Setting the Original Cost of Fixed Assets 7 Tracking Depreciation 8 The Fixed Asset Item List Equity Accounts 1 Equity Accounts 2 Recording an Owner's Draw 3 Recording a Capital Investment Writing Letters With QuickBooks 1 Using the Letters and Envelopes Wizard 2 Editing Letter Templates Company Management 1 Viewing Your Company Information 2 Setting Up Budgets 3 Using the To Do List 4 Using Reminders and Setting Preferences 5 Making General Journal Entries 6 Using Payment Reminders 7 Receipt Management Using QuickBooks Tools 1 Company File Cleanup 2 Exporting and Importing List Data Using IIF Files 3 Advanced Importing of Excel Data 4 Updating QuickBooks 5 Using the Calculator 6 Using the Portable Company Files 7 Using the Calendar 8 The Income Tracker 9 The Bill Tracker 10 The Lead Center 11 Moving QuickBooks Desktop Using the Migrator Tool Using the Accountant's Review 1 Creating an

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Modifying a Report 6 Rearranging and Resizing Report Columns 7 Memorizing a Report 8 Memorized Report Groups 9 Printing Reports 10 Batch Printing Forms 11 Exporting Reports to Excel 12 Saving Forms and Reports as PDF Files 13 Comment on a Report 14 Process Multiple Reports 15 Scheduled Reports Using Graphs 1 Using Graphs 2 Company Snapshot Customizing Forms 1 Creating New Form Templates 2 Performing Basic Customization 3 Performing Additional Customization 4 The Layout Designer 5 Changing the Grid and Margins in the Layout Designer 6 Selecting Objects in the Layout Designer 7 Moving and Resizing Objects in the Layout Designer 8 Formatting Objects in the Layout Designer 9 Copying Objects and Formatting in the Layout Designer 10 Adding and Removing Objects in the Layout Designer 11 Aligning and Stacking Objects in the Layout Designer 12 Resizing Columns in the Layout Designer Estimating 1 Creating a Job 2 Creating an Estimate 3 Duplicating Estimates 4 Invoicing From Estimates 5 Updating Job Statuses 6 Inactivating Estimates 7 Making Purchases for a Job 8 Invoicing for Job Costs 9 Using Job Reports Time Tracking 1 Tracking Time and Printing a Blank Timesheet 2 Weekly Timesheets 3 Time Enter Single Activity 4 Invoicing from Time Data 5 Using Time Reports 6 Tracking Vehicle Mileage 7 Charging Customers for Mileage Payroll 1 The Payroll Process 2 Creating Payroll Items 3 Setting Employee Defaults 4 Setting Up Employee Payroll Information 5 Creating Payroll Schedules 6 Creating Scheduled Paychecks 7 Creating Unscheduled Paychecks 8 Creating Termination Paychecks 9 Voiding Paychecks 10 Tracking Your Tax Liabilities 11 Paying Your Payroll Tax Liabilities 12 Adjusting Payroll Liabilities 13 Entering Liability Refund Checks 14 Process Payroll Forms 15 Tracking Workers Compensation Using Credit Card Accounts 1 Creating Credit Card Accounts 2 Entering Credit Card Charges 3 Reconciling and Paying Credit Cards Assets and Liabilities 1 Assets and Liabilities 2 Creating and Using an Other Current Asset Account 3 Removing Value from Other Current Asset Accounts 4 Creating Fixed Asset Accounts 5 Creating Liability Accounts 6 Setting the Original Cost of Fixed Assets 7 Tracking Depreciation 8 The Fixed Asset Item List Equity Accounts 1 Equity Accounts 2 Recording an Owner's Draw 3 Recording a Capital Investment Writing Letters With QuickBooks 1 Using the Letters and Envelopes Wizard 2 Editing Letter Templates Company Management 1 Viewing Your Company Information 2 Setting Up Budgets 3 Using the To Do List 4 Using Reminders and Setting Preferences 5 Making General Journal Entries 6 Using Payment Reminders 7 Receipt Management Using QuickBooks Tools 1 Company File Cleanup 2 Exporting and Importing List Data Using IIF Files 3 Advanced Importing of Excel Data 4 Updating QuickBooks 5 Using the Calculator 6 Using the Portable Company Files 7 Using the Calendar 8 The Income Tracker 9 The Bill Tracker 10 The Lead Center 11 Moving QuickBooks Desktop Using the Migrator Tool Using the Accountant's Review 1 Creating an Accountant's Copy 2 Transferring an Accountant's Copy 3 Importing Accountant's 4 Removing Restrictions Using the Help Menu 1 Using Help Creating a Legal Company File 1 Making a Legal Company Using Express Start 2 Making a Legal Company Using the EasyStep Interview 3 Reviewing the Default Chart of Accounts 4 Entering Vendors 5 Entering Clients and Cases 6 Enabling Class Tracking for Law Firms 7 Creating Billing Line Items Setting up a Trust Account 1 What is an

IOLTA 2 Creating Accounts for Trust Management 3 Creating Items for Trust Management Managing a Trust Account 1
Depositing Client Money into the Client Trust Account 2 Entering Bills to Pay from the Trust Account 3 Recording Bills for
Office Expenses 4 Paying Bills from the Client Trust Account 5 Using a Client Trust Credit Card 6 Time Tracking and
Invoicing for Legal Professionals 7 Paying the Law Firm s Invoices Using the Client Funds 8 Refunding Unused Client Trust
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