

COATS SYSTEM TRAINING - DAY ONE

Syllabus is subject to change

- I. Employee Screen
 - A. Buttons layout
 - B. Employee Master Record Review
 - C. Status and Mail Codes
 - D. Industrial Skills
 - E. Clerical Skills
 - F. Customizable Skills
 - G. Employee History
 - H. Employee Background
 - I. Previous Temporary Experience
 - J. Employee Payroll Adjustments
 - K. Employee Assignments
 - L. Employee Contact
 - M. Interview Comments
 - N. Payroll Information
 - O. Tax Benefit Data
 - P. Resume On File
 - Q. Calendar Button
 - R. Print Button
 - S. Mail Merge
- II. Client Screen
 - A. Buttons layout
 - B. Client Master Record Review
 - C. Sales Screen
 - D. Accounts Receivable
 - E. GM/GP Screen
 - F. Directions to a Client
 - G. Empl – employees assigned to the client
 - H. Usage
 - I. Dept
 - J. Markup %
 - K. Calendar Button
 - L. Mail Merge
- III. Job Order Screen
 - A. Screen Layout
 - B. Buttons Layout
 - C. Openings
 - D. Find Client
 - E. Adding an Order
 - F. Copying an Order
 - G. Searching for employees
 - H. Handling an Open Order
 - 1. LPM
 - 2. PEN
 - 3. REJ
 - 4. CON
 - 5. ACC
 - 6. INA
 - I. Handling a Filled Order
 - 1. FIN
 - 2. T/H
 - 3. NER
 - 4. Add Comments
 - 5. Giving a Raise
 - J. Direct Hire Order
 - K. Calendar Scheduling
 - L. Re-Opening an Order
 - M. Printing Job Orders Reports

COATS SYSTEM TRAINING - DAY TWO

Syllabus is subject to change

- IV. Automated Reports
 - A. Callback Calendar/Appointments
 - B. Contact Report
 - C. Availability List
 - D. First Time Confirmations
 - E. Current Employee Confirmations
 - F. Daily Employee Confirmations
 - G. Job Order Endings
 - H. Drug Screen/Police Expirations
 - I. Worker's Comp Analysis
 - J. Worker's Comp Analysis By Check
 - K. Skill Code Analysis
 - L. Net Profit TM Electronic Filing
 - M. Unemployment Eligibility Report
 - N. Staffer Productivity
 - O. Staffer Productivity from Invoices
 - P. Employee Reports
 - 1. By Name
 - 2. By Number
 - 3. Label
 - 4. Deduction Report
 - 5. Referral Report
 - 6. Benefit Eligibility Report
 - 7. Callback
 - 8. Alien Expiration
 - 9. Placement Verification
 - 10. Applicant Tracking
 - 11. Temp Experience
 - Q. Client Reports
 - 1. By Name
 - 2. By Number
 - 3. Label
 - 4. Label with Attn Line
 - 5. Client Roster/Labels by Salesperson
 - 6. Weekly Sales Analysis
 - 7. Contacts by Salesperson
 - 8. Contacts by Staffer
 - 9. Sales By Invoice
 - 10. Call Back Report
 - 11. GM/GP History
 - 12. GM/GP History from Invoices
 - 13. Utilization Report
 - 14. Gross Sales Report
 - 15. Gross Sales by Invoices
 - R. Daily Pay Reports
 - 1. Daily Billing
 - 2. Daily Check Register
 - 3. Daily Check Register Summary
 - 4. Daily GMGP
 - 5. Weekly Check Register
 - 6. Weekly Check Register Summary
 - 7. Possible Overtime
 - S. Mail Merge
 - T. Chart Merge

- V. Maintenance of COATS

- A. Setup
 - 1. Function Keys
 - 2. Data Directory
 - B. Codes and Tables
 - 1. Optional Skills
 - 2. Employee Locations
 - 3. Testing Skills
 - 4. Referrals
 - 5. Custom Skill Screens
 - 6. AR/PR Codes
 - 7. Deduction Text
 - 8. AP Codes
 - 9. Bank Codes
 - 10. Sales Codes
 - 11. Skill Codes
 - 12. Workers' Comp Codes
 - 13. Company Information
 - a) Main Screen
 - b) Ledger
 - c) Assg Button
 - d) Users
 - e) Follow Up
 - 14. Tax Tables
 - 15. Local Tax Tables
 - C. Changing Employee SSN#
 - D. Applicant Purge
 - E. Pack Data
 - F. Free Disk Space
 - G. Repair a Table
 - H. COATS Zipper
 - I. Run Alternate Program
 - J. Edit Misc. Transactions
 - K. Update YTD Pay Records
 - L. Report Editor
 - M. License Information
 - N. About COATS
- VI. Payroll
- A. Timecard Worksheet
 - 1. Sort Criteria
 - 2. Generate Time Sheet
 - 3. Print COATS Timecards
 - 4. Adding Hours
 - 5. Print Blank Worksheet
 - 6. Print Time Sheet
 - 7. Transaction Validity
 - 8. Validate and Process
 - B. Posted Timecards
 - 1. Qualifying Transactions
 - 2. Pre-Process Verification
 - 3. Pay Calculator
 - 4. Pay Calculator Errors
 - 5. Transaction Validity
 - C. Preview Checks
 - D. Pay Processor
 - 1. Correct Error
 - 2. Print Pay Register
 - 3. Print State Registers
 - 4. Print Deduction Registers
 - 5. Sort Checks
 - 6. Direct Deposit Advice Slips
 - 7. Print Checks

- 8. Print Check Register
- 9. Print Check Pick-up (Resort First)
- 10. Reset Check Printed
- 11. Append to Employee's Record
 - a) Review Accounts
 - b) Direct Deposit
 - c) Append
- E. Quarterly Processing
- F. Year-End Processing
- G. Creating an Advance Check
- H. Payroll Voided Check Report
- I. Sick Pay Calculator
- J. Vacation Calculator

COATS SYSTEM TRAINING - DAY THREE

Syllabus is subject to change

- VIII. Accounts Receivables
 - A. Invoice Processing
 - 1. Qualifying Transactions
 - 2. Generating Invoices
 - 3. Miscellaneous Tools
 - 4. Invoice Register
 - 5. Invoice Summary
 - 6. Weekly GM/GP
 - 7. Invoice Editor
 - B. Invoice History
 - C. Invoice Payments / Adjustments
 - 1. Screen Layout
 - 2. Button Layout
 - 3. Posting Payments
 - 4. Posting Discounts/Bad Debt
 - 5. Posting from Client Credit
 - 6. Posting Charges
 - 7. All Posted
 - 8. Print Report
 - 9. Save/Restore
 - 10. Post Transactions
 - D. Calculate Finance Charges
 - E. Update Statement Records
 - F. Statement Processing
 - G. Outstanding AR Limit Report
 - H. Clients with Credit Report
 - I. Aged Analysis
 - J. Accounts Receivable Summary
 - K. Sales Tax on Payments Received

- IX. Accounts Payable
 - A. Payable Accounts
 - 1. Button Layout
 - 2. Master Record
 - 3. Creating Accounts
 - 4. Automatic Payables
 - 5. Payroll Payables
 - 6. Manual Payables
 - 7. Adding Manual Transactions
 - a) Invoice Received
 - b) Interest Charge
 - c) Invoice Not an Expense
 - d) Received Discount
 - e) Purchase Asset
 - f) Deposit from AP
 - g) Deposit from Expense
 - 8. Transaction Ledger
 - B. Check Processing
 - 1. Write A Check Window
 - 2. Deleting Checks
 - 3. Generating Auto Payables
 - 4. Generating Manual Payables
 - 5. Handling Payroll Payables
 - a) Print Deduction List
 - 6. Handling EFT Transactions
 - 7. Printing checks from separate banks
 - 8. Appending Checks
 - C. Checking Accounts

1. Button Layout
2. Master Record
3. Creating Accounts
4. Entering Miscellaneous Transactions
 - a) Deposit from Checks
 - b) Deposit from AR/Asset
 - c) Deposit from AP
 - d) Deposit from Investment
 - e) Deposit Income
 - f) Bank Charges
 - g) Same Office Bank Transfer
 - h) Withdrawal from Equity
 - i) Check Direct to AP
5. Transaction Ledger
 - a) Voiding an AP Check
 - b) Reconciliation
- D. AP Balance Report
- E. AP Voided Checks
- F. AP Aged Analysis
- G. AP Charges By Ledger
- H. AP Callback

X. General Ledger

- A. Assets
- B. Ledger/Statements
 1. General Ledger
 - a) Button Layout
 - b) Chart of Accounts
 - c) T Accounts
 - d) Adding Accounts
 2. Creating GJ Transaction
 3. Setting Dates
 4. Create Data
 5. Income Statement
 6. Graph Income
 7. Graph Expenses
 8. Balance Sheet