

Accounting Department (Finance) 2nd Month Objectives

Mentor's Name: _____ Employees Name: _____

Hire Date: _____ Title: _____

Training Requirement	Initials or (N/A)
Ability to run Cash Management in Viewpoint.	
Train employee on running Accounts program.	
Train employee on running Statement Control program.	
Train employee on running Outstanding Entries program	
Train employee on running Transfers program.	
Ability to run Cash Management Reports in Viewpoint	
Train employee how to run Check Book report	
Train employee how to run Accounts Statement report	
Train employee how to run Payment Drilldown Report.	
Train employee how to run Positive Pay File Report.	
Ability to run Job Cost Reports in Viewpoint	
Train employee on how to run JC Detail Report	
Train employee on how to run Job Profitability Internal Report	
Train employee on how to run Cost of Revenue report	
Train employee on how to run Work in Progress with Overrides report	
Train employee on how to run Revenue Detail report	
Train employee on how to run Cost by Job Phase and Cost type report	
Ability to run General Ledger Programs in Viewpoint	
Train employee on how to run Chart of Accounts program	
Train employee on how to run Journal Transaction Entry program	
Train employee on how to run Month End Close program	
Train employee on how to run Account Parts program	
Train employee on how to run Auto Journal Entry program	
Ability to run Job Cost Programs in Viewpoint	
Train employee on how to run Contract Master program	
Train employee on how to run Job Master program	
Train employee on how to run Change Orders program	
Train employee on how to run Job Phases program	
Train employee on how to run Original Estimates program	
Train employee on how to run Cost Adjustments program	
Train employee on how to run Override Projections program	
Train employee on how to run Contract Close program	
Train employee on how to run Cost Projections program	
Train employee on how to run Job Copy program	
Ability to run checks and receipts	
Train employee on how to run checks and receipts	
Ability to run Excel	
Provide training on basic Excel functions	
Training Provided:	

Additional Training Provided:	
1.	
2.	
3.	
4.	
5.	