

Accounting Department (Finance) 6 Month Objectives

Mentor's Name: _____ Employees Name: _____

Hire Date: _____ Title: _____

Training Requirement	Initials or (N/A)
Ability to run Equipment Programs in Viewpoints	
Train employee on how to run Equipment Program	
Train employee on how to run Asset Set Up program	
Train employee on how to run Cost Adjustments program	
Train employee on how to run Depreciation program	
Ability to run Equipment Reports in Viewpoint	
Train employee how to run Equipment Cost Detail report	
Train employee how to run Revenue Detail Report	
Train employee how to run Revenue and Cost Comparison report	
Train employee how to run Revenue by equipment/job.	
Ability to run Fixed Assets	
Train employee on how to run Depreciation report.	
Ability to run Quickbooks	
Train employee on how to run Jane David books	
Train employee on how to run leasing agreements books	
Basic knowledge of workflows	
Train employee of the interaction of department, department roles and organization chart.	
Train employee of each departmental member roles and responsibilities	
Train employee contact information and best method of contact for each project.	
Ability to run Lending	
Train employee on how to run Lending.	
Ability to run Equipment Financing	
Train employee on multiple partners related financing	
Train employee on individual dealership related financing	
Additional Training Provided:	
1.	
2.	
3.	
4.	
5.	