

## **iPOS Admin for SunSystems v4 & v5**

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**Duration:** 1.5 Days

**Prerequisite:** An understanding of the purchasing process and SunSystems. Knowledge of JET (Journal Entry Thin). Knowledge of Microsoft Windows Internet Explorer.

**Who Should Attend:** Purchase Order System Administrator and Purchasing Managers, who are also responsible for iPOS Administration.

**What You Will Learn:** At the completion of this training session participants will be competent in the following:

- Configuring the system profile and defining global settings e.g. Budget Checking, Printers, Periods etc.
- Creating users, groups and group profiles
- Creating approval groups, requisition and invoice approval matrices
- Creating posting rules, transaction rules and posting rule options as part of the Ledger Interface between iPOS & SunSystems
- Creating item records, catalogues and templates
- Supplier setup within iPOS and SunSystems
- Linking items to suppliers
- Locations setup
- Internal (delivery) addresses
- Discussions about XML matching and XML file outputs
- Understanding how the setup of the data in iPOS Administration has an effect on the iPOS Browser

## **Course Content – iPOS Admin for SunSystems**

### ***Introduction and Overview***

- Introduction to iPOS
- The iPOS Browser
- Logging into iPOS Admin
- Navigation

### ***Working with Users, Groups and Group Profiles***

- Introduction to users, groups and group profiles
- Create and define new iPOS users
- Creating user groups & profiles
- Defining requisition profiles
- Creating distributions
- Report folders

### ***Working with Items***

- Overview of items
- Defining units of measure
- Adding an item
- Linking an item to a supplier
- Creating & maintaining catalogues
- Creating & maintaining templates
- Item grouping
- Item analysis hierarchy & Q codes

### ***Working with Suppliers***

- Creating supplier records
- Grouping suppliers

### ***Working with Addresses & Locations***

- Addresses within iPOS
- Creating a delivery address
- Defining a default delivery address
- Grouping addresses locations

### ***Managing the System Profile***

- Global setting and the system profile
- The corporate address book
- Corporate email
- Accounts
- Custom labels
- Transaction analysis & analysis defaulting
- Workflow
- Period table
- Printer profiles

### ***Managing the Approval Process***

- The approval process
- The approval hierarchy
- Defining up approval groups
- Setting up requisition and invoice approval matrices
- Setting up administration authority matrices

### ***Managing iPOS Postings***

- Configuring the ledger interface between SunSystems and iPOS
- Creating posting rules, transaction rules and posting rule options
- Working with assets

### ***iPOS Security***

- User security
- Functional security

### ***Multi Currency***

- iPOS Multi Currency processing