

NEW USER SETUP CHECKLIST ARTICLE FOR SYSTEM ADMINS

This article is intended to help System Admins onboard new employees using Agility. There are helpful articles and videos your employees can review to help learn Agility specific to their job function.

Different videos/article for different business tracks (sales, purchasing, accounting, warehouse, system admin)

Sales

1. Articles

- a. [AR26505](#) – Agility Handbook – Sales
- b. [AR18651](#) – How to Create a Sales Order
- c. [AR18634](#) – Quote Process
- d. [AR18636](#) – OrderPad Procedure
- e. [AR18632](#) – Stock Status Procedure
- f. [AR18791](#) – Sales Order Entry FAQ
- g. [AR18794](#) – OrderPad FAQ
- h. [AR18795](#) – Stock Status FAQ
- i. [AR18793](#) – Cash Receipts FAQ

2. Videos

- a. [V887](#)– Welcome to Agility webinar (sales and purchasing)
- b. [V1832](#) – SO Entry Overview
- c. [V1793](#) – Basic SO Entry
- d. [V1794](#) – Intermediate SO Entry
- e. [V1795](#) – Advanced SO Entry
- f. [V1810](#) – Basic Quote Entry
- g. [V1820](#) – OrderPad Overview
- h. [V1803](#) – Credit Memo Overview
- i. [V980](#) – All About Credit Memos webinar
- j. [V982](#) – All About Quotes webinar

Purchasing

1. Articles

- a. [AR26539](#) – Agility Handbook – Purchasing
- b. [AR18646](#) – How to enter a PO
- c. [AR18647](#) – How to receive a PO
- d. [AR18648](#) – How to Adjust a received PO
- e. [AR2085](#) – Price/Discount Import
- f. [AR20546](#) – Purchasing and Receiving FAQ

- g. [AR1821](#) – Getting Started with Suggested Purchasing (SPOs)
- 2. Videos
 - a. [V887](#) – Welcome to Agility webinar (sales and purchasing)
 - b. [V1850](#) – Purchase Order Process Overview
 - c. [V1851](#) – Basic PO Entry
 - d. [V1852](#) – Advanced PO Entry
 - e. [V1854](#) – Basic PO Receiving
 - f. [V1855](#) – Advanced PO Receiving
 - g. [V1856](#) – Basic PO Receiving Adjustments
 - h. [V1857](#) – Supplier Returns
 - i. [V727](#) – Inventory Management and Control webinar
 - j. [V869](#) – SPOs in Action
 - k. [V870](#) – SPOs Behind the Scenes
 - l. [V871](#) – Help! Common Troubleshooting in SPOs
 - m. [V850](#) – ABCs and Usage

Accounting

- 1. A/R Articles
 - a. [AR26980](#) – Agility Handbook – Accounts Receivable
 - b. [AR679](#) - Setting up Financial Statements (links to other articles/videos)
 - c. [AR18781](#) – Cash Application Procedure
 - d. [AR18638](#) – Credit Memo Entry
 - e. [AR18783](#) – Release Credit Hold
 - f. [AR335](#) – AR Print Invoices
 - g. [AR18787](#) – AR Print Account Statements
 - h. [AR20488](#) – AR FAQ
 - i. [AR18797](#) – AR Cash Application FAQ
 - j. [AR18800](#) – AR Finance Charges FAQ
 - k. [AR18799](#) – AR Invoice Printing FAQ
- 2. A/P Articles
 - a. [AR26699](#) – Agility Handbook – Accounts Payable
 - b. [AR18626](#) – AP Invoice Entry PO
 - c. [AR18624](#) – AP Invoice Entry Expense
 - d. [AR18622](#) – AP Print Checks
 - e. [AR535](#) – AP Edit Invoice
 - f. [AR655](#) – AP Recon Write-off, Drop or Adjust
 - g. [AR18600](#) – AP FAQ
- 3. G/L Articles
 - a. [AR18643](#) – GL Manual Journal Entry
 - b. [AR1627](#) – GL Journal Entry Import

- c. [AR18776](#) – GL Bank Recon
 - d. [AR1828](#) – GL Daily Balancing
 - e. [AR1625](#) – GL Create GL Accounts
 - f. [AR18788](#) – GL Manual Journal Entry FAQ
 - g. [AR18789](#) – GL Bank Recon FAQ
 - h. [AR1001](#) – GL Daily Balancing FAQ
 - i. [AR1954](#) – GL Year End FAQ
4. A/R Videos
- a. [V1128](#)– Welcome to Agility webinar (Accounting)
 - b. [V1163](#) – AR Overview
 - c. [V2000](#) – Accounting Basics: AR and Credit webinar
 - d. [V701](#) – AR and AP Common Issues and Best Practices
 - e. [V1147](#) – Time for a Good Accounting – AR Basics
 - f. [V1161](#) – AR Express Cash Application
 - g. [V1158](#) – AR Cash Application
 - h. [V1159](#) – AR Printing Invoices
 - i. [V1157](#) – AR Invoicing – Sales Profitability Report
 - j. [V1155](#) – AR Invoicing from SO Entry
 - k. [V1164](#) – AR Invoicing from Staging Status
 - l. [V1153](#) – AR Cash Batches
 - m. [V1151](#) – AR Open and Paid Inquiry
 - n. [V1762](#) – AR Open and Paid Inquiry webinar
5. A/P Videos
- a. [V1128](#)– Welcome to Agility webinar (Accounting)
 - b. [V701](#) – AR and AP Common Issues and Best Practices
 - c. [V899](#) – AP Overview
 - d. [V2002](#) – Accounting Basics: AP Processing webinar
 - e. [V900](#) – Basic AP Invoice Entry
 - f. [V902](#) – AP Payment Process
 - g. [V903](#) – AP Check Voiding, Reprinting and Renumbering
 - h. [V904](#) – AP Recon Overview
 - i. [V905](#) – AP Recon Window
 - j. [V906](#) – AP Recon Register
 - k. [V907](#) – Drop/Adjust AP Recon
 - l. [V1145](#) – Time for a Good Accounting – AP Basics
 - m. [V1061](#) – A/P Invoice Entry – Credit Memo and Debit Memo
 - n. [V1062](#) – A/P Invoice Entry – Entering Multiple Transactions
 - o. [V1001](#) – A/P Invoice Edit
 - p. [V1002](#) – A/P One Step Payment
6. G/L Videos
- a. [V1128](#)– Welcome to Agility webinar (Accounting)

- b. [V1058](#) – General Ledger Overview
- c. [V966](#) – GL Integration Points General Setup
- d. [V967](#) – GL Integration Points Purchasing
- e. [V968](#) – GL Integration Points Sales
- f. [V969](#) – GL Integration Points Specialty Specific
- g. [V672](#) – SMT 2 General Ledger Setup
- h. [V976](#) – General Ledger Structure Definition
- i. [V979](#) – General Ledger Accounts
- j. [V985](#) – General Ledger Account Groups
- k. [V997](#) – GL Categories Definition and Default System GL Accounts
- l. [V1008](#) – General Ledger Transaction Flow
- m. [V1011](#) – General Ledger Component Processing
- n. [V1014](#) – General Ledger Journal Entry Basic
- o. [V1044](#) – General Ledger Journal Entry Advanced
- p. [V1053](#) – General Ledger Journal Entry Edit
- q. [V1057](#) – General Ledger Journal Entry Import
- r. [V861](#) – Financial Reporting – Building Custom Financial Reports
- s. [V1115](#) – Review of Year End Procedures webinar

Warehouse

- 1. Articles
 - a. [AR18654](#) – Basic Two Step Picking
 - b. [AR18784](#) – Physical Inventory Procedure
 - c. [AR18780](#) – Inventory Adjustments
 - d. [AR1207](#) – Item Import
 - e. [AR1699](#) – Dead Stock Report FAQ
 - f. [AR18782](#) – Inventory Adjustments FAQ
 - g. [AR20555](#) – Inventory Control and Physical Inventory FAQ
- 2. Videos
 - a. [V1132](#) – Welcome to Agility webinar (Inventory Control)
 - b. [V1814](#) – Shipping Process Overview
 - c. [V1815](#) – Order Processing Overview
 - d. [V1816](#) – Staging Status Overview
 - e. [V1817](#) – Basic One Step Shipping Process
 - f. [V1818](#) – Basic Two Step Shipping Process
 - g. [V910](#) – Building it with Remans webinar
 - h. [V783](#) – Understanding Physical Inventory in Agility webinar
 - i. [V1962](#) – Keep Inventory Current with Cycle Counts
 - j. [V727](#) – Inventory Management and Control webinar

System Admins

1. Articles

- a. [AR20108](#) – Getting Started as a New System Manager
- b. [AR1998](#) – How to create a new user on the Wedge
- c. [AR1366](#) – How to create a new user in Agility
- d. [AR2511](#) – How to create a new Hosted User
- e. [AR27482](#) – Password Policy: Prohibition of Compromised Passwords
- f. [AR27485](#) – Hosted Password Policy Q&A
- g. [AR2007](#) -How to Change or Update User Passwords in the Portal
- h. [AR27604](#) – How to Clean up Users on Your System
- i. [AR21955](#) – How to lock out a former employee
- j. [AR27204](#) – IT Job Description thoughts when searching for IT resource or Agility System Manager
- k. [AR1617](#) – How to set up Security Groups
- l. [AR1614](#) – How to assign users to Security Groups
- m. [AR27189](#) – How to Get Started with Organization Security
- n. [AR2097](#) – How to set up User Preferences
- o. [AR1156](#) – Common User Preferences
- p. [AR421](#) – How to edit Sales Order layouts
- q. [AR20654](#) -Access local files more easily using upgraded Agility Virtual Channel
- r. [AR1207](#) – Item Import
- s. [AR1594](#) – Supplier Import
- t. [AR1606](#) – Customer Import
- u. [AR2085](#) – Price/Discount Import

2. Videos

- a. [V1926](#) – How to Onboard New Employees webinar
- b. [V887](#) – Welcome to Agility webinar (sales and purchasing)
- c. [V717](#) – How Security Works in Agility
- d. [V1993](#) – Introduction to Organization Security webinar
- e. [V2007](#) – Organization Security Details webinar
- f. [V893](#) – Effective use of Audits and Purges webinar
- g. [V569](#) – Brief Overview of the Wedge
- h. [V720](#) – Searching on the Wedge
- i. [V699](#) – The Wedge webinar
- j. [V757](#) – Simplify your Life with Automated Processing
- k. [V744](#) – Maximize your Day with Viewers and Reports
- l. [V696](#) – Utilizing the Power of the Imports webinar
- m. [V1134](#) – Core Things all System Admins Should Know webinar