

## **Process Manager for SunSystems v4**

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**Duration:** 2 Days – scheduled on demand

**Prerequisite:** An advanced knowledge of SunSystems is essential. Knowledge of internal business process would be advantageous.

**Who Should Attend:** System Administrators / Advanced Users with set-up access and an understanding of the business rules of the organisation.

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

- Configure the rules engine to validate and automate the processing data in SunSystems
- Configure and use transfer manager to transfer data between SunSystems modules, ledgers, databases and external applications
- Configure and use Reconciliation Manager to reconcile and allocate accounts in SunSystems
- Ledgers and databases
- Apply the principles learned to your own requirements

**Please see over page for course content**

## **Course Content – Process Manager for SunSystems v4**

### ***The Rules Engine***

- Creating a rule combining event profiles and rule sets
- Defining rule messages
- Using decision tables
- Checking that reference records exist
- Displaying data items in a message
- Using lookup tables
- Applying definable data items
- Using temporary workspaces
- Running redefined macros

### ***Transfer Manager***

- Defining the transfer profile
- Exporting data to a budget ledger
- Changing the data being exported

- Performing ledger reversal
- Using the prompt and amend functions
- Transferring data to Excel
- Performing a debtor/creditor transfer
- Calling Transfer Manager from Journal Entry
- Creating business menus
- Defining business views
- Using Business Analyser

### ***Reconciliation Manager***

- Creating Reconciliation profiles
- Defining Reconciliation accounts for source transactions
- Using Reconciliation Manager to perform reconciliations
- Using rule sets within Reconciliation Manager