



Finance Enterprise

Course Catalog



Contact us

CentralSquare Technologies
1000 Business Center Drive
Lake Mary, Florida 32746
centralsquare.com

Connect Community

community.centralsquare.com

Education and training

csu@centralsquare.com • (800) 727-8088 • catalog.centralsquare.com

Support

support.centralsquare.com • (888) 663-7877

Copyright © 2021. CentralSquare Technologies, LLC. All Rights Reserved.

Except as permitted under US Copyright Act of 1976, no part of this work may be reproduced, distributed, or transmitted in any form or by any means, or stored in a database or retrieval system, without prior written permission and consent of the publisher.

ONESolution and ONESolution 's logo are trademarks of CentralSquare Technologies, LLC, (herein "Publisher"), or its affiliates, successors, or assigns.

DISCLAIMER

All of Publisher's original works of authorship fixed in tangible mediums of expression, including but not limited to this publication of any associated software, are copyrighted under United States law and applicable international copyright laws and treaty provisions. The copyrights in the works are owned by the Publisher or by one of its affiliates, or by third parties who have licensed their materials to Publisher. The entire work of this publication, and any other copyrighted works of the Publisher, are copyrighted under United States law and applicable international copyright laws and treaties, and Publisher owns the copyright in the selection, coordination, arrangement and enhancement of said works. Publisher reserves all rights not expressly granted to the licensee.

You have been granted a limited non-exclusive license to use and/or access the published works under terms of the associated license agreement, and any other agreements governing the software listed on the cover of this publication; all of which are incorporated hereto.

Except as expressly stated in the applicable license agreement, you may not copy, download, print, publish, display, perform, distribute, transmit, transfer, translate, modify, add to, update, compile, abridge or in any other way transform or adapt all or any part of any of the Publisher's copyrighted works without first obtaining written permission from the Publisher.

No right, title, or interest in the copyrighted works is transferred to you when you access or use the works. Except for the limited, non-exclusive license expressly granted in the governing agreement, nothing contained in these terms and conditions shall be construed as conferring a license or ownership interest, be it by implication, estoppel or otherwise, or any other right under any copyright, trademark, patent, or other intellectual property right of Publisher or any third party.

The information in this copyrighted works is subject to change without notice.

In no event shall the Publisher be liable for any special, incidental, indirect, or consequential damages of any kind arising out of or in connection with the use of the Publisher's copyrighted works or other material derived thereof, whether or not advised of the possibility of damage, and on any theory of liability. This publication is provided "as-is." **The Publisher gives no express warranties, guarantees, or conditions. Publisher excludes all implied warranties and conditions, including those of merchantability, fitness for a particular purpose, and non-infringement. If local law does not allow the exclusion of implied warranties, then any implied warranties, guarantees, or conditions last only during the term of the limited warranty and are limited as much as local law allows. If local law requires a longer limited warranty term, despite this agreement, then that longer term will apply, but licensee can recover only the remedies allowed by the applicable governing agreement.**

Contents

Overview	1
Overview 18.1	1
Accounts Receivable & Cash Receipts	2
AR & CR 18.1	2
Creating and Billing an AR Customer 18.1	2
Human Resources & Payroll	4
HY & PY 18.1	4
HR - Employee Online 18.1	4
New Employee Setup - Human Resources Tables 18.1	4
New Employee Setup - Payroll Tables 18.1	5
Payroll Processing 18.1	6
General Ledger	7
General Ledger 18.1	7
Requisition to Check	8
Requisition to Check Process 18.1	8
Person & Entity	9
PEUPPE 18.1	9

Overview

Overview 18.1

Description: This program will explore basic navigation, searching, Workspaces, new functionality, and more!

Duration: 56 minutes

Course/Description	Duration
Workspaces <ul style="list-style-type: none">In this course, you will explore the new Workspaces within CentralSquare Finance Enterprise 18.1.	18 mins
Screen Navigation <ul style="list-style-type: none">Discover how to navigate the new screen design within CentralSquare Finance Enterprise 18.1.	23 mins
What's New <ul style="list-style-type: none">Find out what's new in the CentralSquare Finance Enterprise 18.1 subsystems.	15 mins

Accounts Receivable & Cash Receipts

AR & CR 18.1

Description: In this program, you will learn about the various screens within the Accounts Receivable/Cash Receipts module.

Duration: 1 hour 31 minutes

Course/Description	Duration
Workspace & Accounts Receivable Codes <ul style="list-style-type: none">In this course, we will explore the Accounts Receivable Workspace and Codes.	13 mins
Interactive Cash Receipts – Set Tab <ul style="list-style-type: none">Let's explore the Set Tab in the Interactive Cash Receipts screen.	16 mins
Interactive Cash Receipts – Receipt & Customer Changes Tab <ul style="list-style-type: none">In this course, you will learn about the Receipt Tab and the Customer Charges Tab.	20 mins
Interactive Cash Receipts – Misc. Payments Tab <ul style="list-style-type: none">Let's learn about the Misc. Payments Tab within the Receipt Tab.	20 mins
Create/Update Cash Receipt Set <ul style="list-style-type: none">Explore the Create/Update Cash Receipt Set screen.	11 mins
Assessment	11 mins

Creating and Billing an AR Customer 18.1

Description: This program focuses on Account Receivable processing within CentralSquare Finance Enterprise.

Duration: 45 minutes

Course/Description	Duration
Customer Creation <ul style="list-style-type: none">Let's explore how to create a customer in the system.	15 mins

Course/Description	Duration
Invoice Creation & Processing <ul style="list-style-type: none">• Discover how to create an invoice, as well as how to process it.	15 mins
Reporting <ul style="list-style-type: none">• Let's explore all reports associated with how to create and bill an AR customer	15 mins

Human Resources & Payroll

HY & PY 18.1

Description: This program will explore the Human Resources/Payroll modules.

Duration: 1 hour 10 minutes

Course/Description	Duration
Employee Master <ul style="list-style-type: none">Learn how to create a new employee in the Employee Master screen.	18 mins
Employee Quick Pay Assignments <ul style="list-style-type: none">In this course, we will explore the Employee Quick Pay Assignments screen.	16 mins
Employee Pay Related Assignments <ul style="list-style-type: none">Explore the Employee Pay Related Assignments screen.	14 mins
Employee Benefits, CDH Assignments, Education & Skills, and Employee Tracking <ul style="list-style-type: none">In this course, we will discover the Employee Benefits, CDH Assignments, Education & Skills, and Tracking screens.	11 mins
Assessment	11 mins

HR - Employee Online 18.1

Course/Description	Duration
Employee Online <ul style="list-style-type: none">Explore the tabs available to you in Employee Online.	24 mins

New Employee Setup - Human Resources Tables 18.1

Description: This program focuses on setting up HR tables within CentralSquare Finance Enterprise.

Duration: 32 minutes

Course/Description	Duration
HRTBCE, HRTBSC, & HRTBSL <ul style="list-style-type: none"> In this course, we will explore the Entity Specific HR codes (HRTBCE), the Salary Schedule codes (HRTBSC), and the Salary definitions (HRTBSL) screens used in setting up a new employee in the HR tables. 	17 mins
HRTBJB, HRTBPC, & HRTBBE <ul style="list-style-type: none"> Let's explore the Job Code definitions (HRTBJB), the Position Code definitions (HRTBPC), and the Benefits definitions (HRTBBE) screens use in setting up a new employee in the HR tables. 	15 mins

New Employee Setup - Payroll Tables 18.1

Description: This program focuses on setting up payroll tables within CentralSquare Finance Enterprise.

Duration: 1 hour 2 minutes

Course/Description	Duration
PYUPHN & PYUPPR <ul style="list-style-type: none"> In this course, we will explore the Payroll Entity definitions (PYUPHN) and the Pay Period definitions (PYUPPR). 	16 mins
PYUPSC, PYUPCA, & PYUPHH <ul style="list-style-type: none"> This course will explore the Work Schedule definitions (PYUPSC), Payroll Calendar definitions (PYUPCA), and the Hour definitions (PYUPHH). 	17 mins
PYUPPY, PYUPDD, & PYUPCC <ul style="list-style-type: none"> In this course, we will explore the Pay Class definitions (PYUPPY), the Contribution definitions (PYUPDD), and the Deduction definitions (PYUPCC). 	17 mins
Assessment	12 mins

Payroll Processing 18.1

Description: This program focuses on processing payroll using CentralSquare Finance Enterprise.

Duration: 51 minutes

Course/Description	Duration
Part 1 of 2 <ul style="list-style-type: none">• Explore payroll processing, including the various screens and jobs required.	21 mins
Part 2 of 2 <ul style="list-style-type: none">• Let's continue to explore how to process payroll.	18 mins
Assessment	12 mins

General Ledger

General Ledger 18.1

Description: This program focuses on the General Ledger function in CentralSquare Finance Enterprise.

Duration: 35 minutes

Course/Description	Duration
GLUPGN <ul style="list-style-type: none">In this course, we will explore the General Information – General Ledger screen.	21 mins
GLJEUB <ul style="list-style-type: none">In this course, you will discover the Create/Update Journal Entry Set screen.	14 mins

Requisition to Check

Requisition to Check Process 18.1

Description: In this program, you will explore the Requisition to Check Process.

Duration: 1 hour 55 minutes

Course/Description	Duration
Order & Pay Vendor – Person/Entity Information Screen <ul style="list-style-type: none"> In this course, you will explore the function of the Person/Entity Information screen in the Requisition to Check Process. 	15 mins
Order & Pay Vendor – Purchase Requests Screen <ul style="list-style-type: none"> Explore the function of the Purchase Requests screen. 	17 mins
Order & Pay Vendor – Print PO's & Direct Update of Encumbrances Transactions Screen <ul style="list-style-type: none"> Explore the functions of the Print Purchase Orders and Direct Update of Encumbrances Transactions screens. 	12 mins
Receive/Invoice <ul style="list-style-type: none"> Let's learn how to create receiving and invoicing for a transaction. 	27 mins
Pay Invoice <ul style="list-style-type: none"> This course will focus on how to pay the invoices. 	15 mins
Bank Reconciliation <ul style="list-style-type: none"> In this course, we will explore how to reconcile bank statements. 	12 mins
Assessment	17 mins

Person & Entity

PEUPPE 18.1

Description: In this program, you will explore the fields and tabs in the header, email, and address portion of the PEUPPE screen.

Duration: 46 minutes

Course/Description	Duration
Header Portion <ul style="list-style-type: none">Discover the functionality of the fields in the header portion of the Person/Entity screen.	24 mins
Address and Email Portion <ul style="list-style-type: none">In this course, we will explore the Address and Email tabs in the PEUPPE screen.	22 mins