

Attaché Masterclass: Housekeeping

Overview:

This masterclass is designed to empower new and existing accounts and payroll users with the essential skills and knowledge to confidently manage their Access Attaché system. You'll be guided through key tasks to effectively clean up and optimise your system.

What do you need to know?

The course assumes confidence in Attaché navigation and an understanding of the accounting / payroll principles, along with compliance requirements and the individual business needs for data retention.

Delivery Method

This webinar is delivered via the GoTo platform.

Duration

2 hours.

What does this course cover:

- Planning your housekeeping.
- Deleting & Managing data:

Payroll

- Deleting history transactions.
- Managing super payment details.
- Removing terminated employees.
- Review unused or inactive pay elements and other codes.

Accounts

- Deleting completed documents including orders, quotes, invoices, purchase orders etc.
- Deleting customer and supplier zero balance and completed transactions.
- Deleting product transactions.
- Identification, marking & deletion of inactive records.

- Data Checks:

- Check the database system status.
- Compress the database.
- Run through the index file optimiser.

Objectives:

- ✓ Identify “when” to complete housekeeping.
- ✓ Understand the steps to take before commencing housekeeping tasks.
- ✓ Gain practical knowledge on how to clean up and maintain your Attaché system.
- ✓ Learn how to troubleshoot housekeeping related scenarios.
- ✓ Perform essential data checks.