SherWare consulting

SherWare
Software That Empowers

SherWare's Disbursement and JIB Manager Integrated Edition Consulting

Upon purchasing the software, each client is enrolled in our SherWare Consulting program designed to get you acclimated to how SherWare works as quickly as possible. Our consulting program gives you five hours of consulting with a support technician in one-hour time frames, one session per week.

Each session covers a specific and important piece of understanding how our software works, from setup to entering revenue and bills, to closing your run and sending out statements, invoices and checks.

After each session, your consultant will give you "homework" to complete before the next session going over what will be discussed during your next session. Your homework will consist of completing various steps each week from the Getting Started Guide included with your software package.

Once the homework has been completed, the support technician will review the work that has been completed to check for accuracy based on the how the software is designed to function, and your company's software needs. This review will happen during the consulting session along with additional training, answering any additional questions the user may have regarding that session topic.

Overview of the sessions:

The five sessions are:

1. Setup of Preferences, including account selection (also Expense Codes and Revenue Categories). Review of how activity will post to the general ledger.

2. Setup of Wells, Owners, Division of Interest

3. Entering Revenue and Expenses (bills, production receipts, etc.)

4. Closing Revenue Run, Printing Checks, Receiving Net Payments

5. Closing JIB Run, Receiving JIB Payments

Prior to beginning your first session, please complete this homework: Set up your Preferences, Expense Codes and Revenue Categories and select your Accounts by completing Steps 1 through Step 12 and Step 18 in your Getting Started Guide.

Session 1: Introduction, Setup of Preferences, Account Selection (also Expense Codes and Revenue Categories) and review of how activity will post to the general ledger.

During this session you will discuss with your support technician your business goals, why you purchased the software and how we can help you get the most out of it. You will also be introduced to the software and shown how to begin setting up your preferences and accounts.

Requirements:
Have Steps 1 through Step 12 and Step 18 completed in your Getting Started Guide before beginning this session.

Duration:
Not to exceed 1 hour

Goals: Your SherWare consultant will discuss your business goals and why you purchased the software so that they can help you setup and learn the software to achieve your disbursement and joint interest billing needs.

Learn how to setup preferences and how they will affect your distributions. Select your accounts and understand how transactions will post to your general ledger. Set up expenses codes and see what options are associated with the codes.

Next Step: After you have completed this session with your consultant, schedule your next session to discuss setting up Setting Up Owners, Well and Interests.

Homework: Practice setting up your owners, wells and division of interests by completing Steps 13 through 16 in the Getting Started Guide.

Session 2: Setup your Owners, Wells and Division of Interest

Requirements:
Have Steps 13 through 16 completed in your Getting Started Guide before beginning this session.

Duration:
Not to exceed 1 hour

Goals: During this session you will review your setup of Owners, Wells and Division of Interest within our software as well as go over any questions you had about the setup. Complete explanation of how this information functions within the software will be provided.

Next Step: After you have completed this session with your consultant, schedule your next session to discuss how to enter revenue and expenses within the software.

Homework: Practice entering revenue and expenses by completing Step 17 and Steps 19 through 29 in your Getting Started Guide.

Session 3: Entering revenue and expenses (production receipts and bills)

Requirements:
Have Step 17 and Steps 19 through 29 completed in your Getting Started Guide before beginning this session.

Duration:
Not to exceed 1 hour

Goals: Your SherWare consultant will review how to enter revenue and expenses within the software as well as how this information is posted to the general ledger.

Next Step: After you have completed this session with your consultant, schedule your next session to discuss how to close a Revenue Run, how to print your checks and then receive Net Payments.

Homework: Practice closing a revenue run, printing checks and receive owner net payments by completing Steps 30 and 31 in your Getting Started Guide.

Session 4: Closing Revenue Run, Printing Checks, Receiving Net Payments

Requirements:
Have Steps 30 and 31 completed in your Getting Started Guide before beginning this session.

Duration:
Not to exceed 1 hour

Goals: Your SherWare consultant will explain how to audit your data before you close a run, the steps to closing a run, how to print checks and receive owner net payments.

Next Step: After you have completed this session with your consultant, schedule your final session to discuss how to close a JIB Run, receive JIB owner payments and cover any other questions you have left about using the software.

Homework: Practice closing a JIB Run and receiving JIB owner payments by completing Step 33 in your Getting Started Guide.

Session 5: Close a JIB Run, Receive JIB Owner Payments & Wrap Up

Requirements:
Have Step 33 completed in your Getting Started Guide before beginning this final session.

Duration:
Not to exceed 1 hour

Goals: Your SherWare consultant will explain how to close a JIB Run and receive JIB owner payments. You will learn how to close a JIB Run and receive JIB owner payments.

Your consultant will also answer any other questions you have about using the software and direct you to the Online Support Library where we have additional learning resources.

Next Step: After completing these five-course consulting sessions, you now should have an understanding of how to setup and use the software. We will follow up with you to make sure you are using the software the way you need to, and help make sure you are comfortable using the software.

Terms of Use

You must complete your SherWare consulting within 60 days of purchasing the software.

After you have scheduled a consulting session with your consultant, if you need to cancel or reschedule, at least 48 hours notice is required.

We recommend that the user(s) going to be operating the software the most frequently go through the consulting sessions.

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