



Denver Training Center
12596 W Bayaud Ave
Suite 400
Lakewood, CO 80228

Houston Training Center
1177 West Loop South
Suite 1717
Houston, TX 77027

Training Schedule
bolosystems.com

Online Training Sessions
wellpointsystems.webex.com

Contact
Training@wellpointsystems.com

Bolo Software

Course Catalog



Training Agenda



| | | |
|---------------------|----------------------|-----------------------|
| Module | | CPE |
| Course Title | 2006 Recurring Batch | Field of Study |
| Delivery | Group-Internet-Based | |
| Cost | \$50.00 | Pre Req |

Course Description

The EBATCH06 session focuses on the Recurring batch process in the BOLO software and the use of our export tool to extract data from the Bolo software to a third party vendor. Online training sessions are self registering through the bolosystems.webex.com website. The registration password is bolotrain and you are invoiced per connection.

Objectives

- Participants will be able to identify the steps required to set up a batch to run on a scheduled bases.
- Participants will be able to monitor the scheduled job using the recurring batch applications.
- Participants will use the export utility to generate a .txt file from the Name file with all records from the state of Colorado.
- Participants will enable the export utility for the recurring batch process and will schedule the temp file to run on a scheduled basis.



Training Agenda



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|---------------------|------------------------|-----------------------|
| Module | | CPE |
| Course Title | Back to Bolo Promotion | Field of Study |
| Delivery | Client | |
| Cost | \$1,000.00 | Pre Req |

Course Description

A special Promotional Course allowing clients unlimited access to online training 9/09 - 12/09.

Objectives



Training Agenda



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|---------------------|---------------------|-----------------------|------------------------------|
| Module | Accounts Receivable | CPE | 3 |
| Course Title | Accounts Receivable | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Live | | |
| Cost | \$300.00 | Pre Req | Navigation |

Course Description

This course will cover system setups, entering manual accounts receivable invoices, cash calls and reports. You will review the best reports to assist you in analyzing your open receivables and how to make adjustments to manual invoices and cash calls.

Objectives

- System set ups and defaults
- Set up new customer
- Set up manual accounts receivable invoice
- Set up cash call invoice
- Print manual invoice
- Aging and sub-ledger reports
- Adjustments to manual invoices and cash calls



Training Agenda



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|---------------------|----------------------|-----------------------|------------------------------|
| Module | AP | CPE | 1 |
| Course Title | AP ACH Process | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | AP Entry I |

Course Description

The BOLO software supports Automated Clearing House (ACH) payments through the Accounts Payable and Revenue module. The ACH process allows electronic transfer of funds from the client's designated AP financial institution to the vendor's designated ACH financial institution. In this session we will demonstrate setting up employee expenses for ACH. The cost of this course is \$150.00 per connection. There is a \$10.00 no show fee for cancellations not received 24 hours before the course begins.

Objectives

- Enable the AP financial institution for ACH
- Create Special Handling Codes to support the AP ACH process
- Create a financial institution for a vendor
- Enter an invoice to be paid through the ACH process
- Generate the ACH file for the AP module



Training Agenda



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|---------------------|----------------------|-----------------------|------------------------------|
| Module | AP | CPE | 1 |
| Course Title | AP Entry I | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | Name and Address |

Course Description

In this session we will review the invoice register and invoice data entry screen. Templates will be discussed and basic AP reports reviewed. The cost for this session is \$150 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the <https://wellpointsystems.webex.com> website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- Invoice register
- Vendor inquiry
- AP invoice data entry
- Invoice templates
- Invoice reversal
- Vendor inquiry
- AP sub-ledger report
- Accounts Payable coding edit report



Training Agenda



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|---------------------|--------------------------------|-----------------------|------------------------------|
| Module | Asset Tracking | CPE | 1 |
| Course Title | Introduction to Asset Tracking | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | Navigation |

Course Description

Tracking fixed assets systematically is now available by using the BOLO Asset Tracking module. You can now manage materials inventory, calculate book and tax DD&A and journal entries, handle asset sales, material transfers and account for leasehold costs. This session will be an overview of the module, its benefits to you and a discussion on how to implement. The cost for this session is \$100 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the bolosystems.webex.com website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- Fixed asset
- Asset categories
- Depletion method
- Fixed asset set ups
- System example



Training Agenda



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|---------------------|-------------------|-----------------------|------------------------------|
| Module | Capital Budgeting | CPE | 3 |
| Course Title | Capital Budgeting | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Live | | |
| Cost | \$300.00 | Pre Req | Navigation |

Course Description

This course will walk you through all aspects of capital budgeting. You will learn how to build new AFE's and implement AFE profiles with coding controls. You will also learn how to use more advanced processes such as the AFE accrual process that builds system accruals based on incurred costs from the field and run through a work in progress re-class process.

Objectives

- AFE profiles for various AFE types
- New AFE
- "Canned" AFE reports and authorization form
- Enter incurred acost and run through an accrual process
- Change AFE from in progress to closed
- Participants will run the WIP re-class process



Training Agenda



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|---------------------|----------------------|-----------------------|------------------------------|
| Module | Capital Budgeting | CPE | 1 |
| Course Title | Intro To AFE | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | Cost Centers |

Course Description

The Capital Budgeting System tracks how your company tracks and reports AFE information. In this session we will look at the maintenance setup and reporting of AFE's. The cost for this session is \$150 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the bolosystems.webex.com website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- Benefits of AFE's
- Two ways to build AFE's
- AFE profiles
- Control coding
- AFE reports



Training Agenda



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|---------------------|----------------------|-----------------------|------------------------------|
| Module | Cash Disbursements | CPE | 4 |
| Course Title | 1099 Online Series | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$500.00 | Pre Req | Navigation |

Course Description

The 1099 Online series is designed in four one hour sessions that are held each day for four consecutive days. The four sessions include: 1099 Preparation, Post and Review Transactions, 1099 Transaction Maintenance, 1099 Statement Printing. The total cost for this session is \$500 per connection. There is a \$50 fee for No Shows. Online training sessions are self-registering through the <https://wellpointsystems.webex.com> website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

W1099A- 1099 Preparation

- Set up applications for tax year and company
- Set up an owner for back up withholding

W1099B- Post and Review Transactions

- W1099A session review
- Post Transactions to 1099.TRANS(YY) file
- Review transaction posting

W1099C- 1099 Transaction Maintenance

- Transactions being reported to the IRS
- Create Pseudo check for 1099 information
- Common transaction scenarios
- 1099 upload

W1099D- Statement Printing

- Process to post information to the 1099.FORMS (YY)
- View generated 1099 statements
- Using Filter Raw Print
- Transmitting the MAG file to the FIRE IRS system



Training Agenda



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|---------------------|--------------------|-----------------------|
| Module | Cash Disbursements | CPE |
| Course Title | 1099 Refresher | Field of Study |
| Delivery | Self Study | |
| Cost | | Pre Req |

Course Description

The 1099 Refresher is designed to remind clients of how BOLO handles the 1099 process. This free course can be accessed from the <https://wellpointsystems.webex.com> website. You can register for the course from the recorded sessions section on the left side of the screen. A password can be obtained by contacting training@wellpointsystems.com.

Objectives

- 1099 Preparation
- Reports to Review
- Transaction Posting
- Transaction Maintenance
- Form Creation
- Media Creation (Creating the EDI file for the IRS FIRE System)



Training Agenda



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|---------------------|-------------|-----------------------|------------|
| Module | Core | CPE | |
| Course Title | Attachments | Field of Study | |
| Delivery | Self Study | | |
| Cost | \$0.00 | Pre Req | Navigation |

Course Description

The attachment function allows BOLO users to attach documents to BOLO records in selected BOLO applications. This tutorial is free for our BOLO users. The time to complete is 15 minutes. Registration and a password is required. The self study courses are accessed from the recorded sessions section on the <https://wellpointsystems.webe.com> site. A password can be obtained by contacting training@bolosystems.com.

Objectives

- Applications that have the attachment functionality
- Acceptable File types
- Methods of creating Attachment types
- Attaching a document to a record
- Reviewing a document attached



Training Agenda



| | | |
|---------------------|------------|-----------------------|
| Module | Core | CPE |
| Course Title | Bolo UI | Field of Study |
| Delivery | Self Study | |
| Cost | \$0.00 | Pre Req |

Course Description

The BOLO UI self study course is designed to introduce clients to the new graphical user Interface and accentuate the enhancements made for users from our old client. This free interactive course can be taken any time by clients. Registration and a registration password is required to participate. To access the self study courses visit <https://wellpointsystems.webex.com>. The password can be obtained by contacting training@bolosystems.com.

Objectives

- New BOLO UI Menus
- Toolbar and functionality
- 3 methods to access applications
- New report viewer
- Advanced searches in the UI
- Bolo workspace and customization



Training Agenda



| | | | |
|---------------------|----------------------|-----------------------|------------------------------|
| Module | Core | CPE | 1 |
| Course Title | Cost Centers | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | Navigation |

Course Description

Cost Centers are buckets that are used to capture costs and statistical data for leases, prospects, areas, districts, basins, properties, and fields. Cost Centers are used in reporting and coding controls. It is important that clients understand the purpose of Cost Centers and their impact on the BOLO software. This online session will discuss cost centers and how they are used in the Bolo software. The cost for this session is \$150 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the <https://wellpointsystems.webex.com> website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- Cost center definition
- Cost center types
- Cost center categories
- Cost center reports
- Cost center imports



Training Agenda



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|---------------------|--------------|-----------------------|------------|
| Module | Core | CPE | |
| Course Title | Data Imports | Field of Study | |
| Delivery | Self Study | | |
| Cost | \$0.00 | Pre Req | Navigation |

Course Description

Importing data into BOLO saves you time and increases accuracy. This session will describe the many import options, review recent enhancements, review the Bolo import process, and demo the AP invoice import application. The Import process is a self study tutorial that you can access from our <https://wellpointsystems.webex.com>. A password is required to access. You can request a password by contacting training@bolosystems.com

Objectives

- Import definition
- BOLO Import Process
- Available imports
- Demo AP4301- Account Payable Import



Training Agenda



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|---------------------|------------|-----------------------|------------|
| Module | Core | CPE | |
| Course Title | DropOff | Field of Study | |
| Delivery | Self Study | | |
| Cost | \$0.00 | Pre Req | Navigation |

Course Description

The DropOff folder serves a public folder for all BOLO users. This tutorial goes through the functionality of the DropOff Folder and how to properly create a link to the DropOff folder. There is no charge for this session. Registration is required. Please contact training@wellpointsystems.com for a password.

Objectives

- Purpose of the DropOff folder
- BOLO applications that use the DropOff
- Creating a Network Place
- In house considerations
- ASP considerations



Training Agenda



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|---------------------|-------------|-----------------------|------------------------------|
| Module | Core | CPE | 24 |
| Course Title | Fast Track | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Live | | |
| Cost | \$2400.00 + | Pre Req | |

Course Description

The Four day Fast Track course is designed to introduce new users to the BOLO software. An overview of the modules and how they interact with each other is reviewed. Participants get hands on access to a demo data area as they explore the BOLO software. The Fast Track class can be held at our site or yours with your data our ours. Please contact your Account Manager or training to schedule this course. The cost of the course is dependent on the number of people and data area used during the training.

Objectives

- Navigation basics
- Name and address
- General coding controls
- Approval process
- Property set up
- AFE's
- Billing decks and Revenue decks
- AP data entry
- Cash disbursements
- Manual AR invoices
- Cash receipts
- General ledger
- JIB set ups & processing



Training Agenda



| | | | |
|---------------------|----------------------|-----------------------|------------------------------|
| Module | Core | CPE | 1 |
| Course Title | Name And Address | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | Navigation |

Course Description

The Name and Address file is very important to BOLO Processing. In this session participants will learn how to properly set up records for COM1201, AP1210, AR1210, RV1210 for processing. The cost for this session is \$150 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the bolosystems.webex.com website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- Create NAME records, including VENDOR, CUSTOMER, AND RV.OWNER
- Creating site records
- Copy existing records
- Perform mass updates
- Understand and assign usage codes
- Process the Name and Address Information Report



Training Agenda



| | | | |
|---------------------|----------------------|-----------------------|------------------------------|
| Module | Core | CPE | 1 |
| Course Title | Navigation | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | |

Course Description

The Navigation course is designed to review how to efficiently navigate through the BOLO Software making data entry and searching for assistance a snap. The cost for this session is \$150 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the bolosystems.webex.com website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- Main menu functions
- BOLO's application nomenclature
- Menu shortcuts
- Locating applications using find, short cuts, and keywords
- Different types of data fields and functions
- Basic data entry
- Advanced searches
- Working with Canned Reports



Training Agenda



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|---------------------|----------------------|-----------------------|------------------------------|
| Module | Core Accounting | CPE | 2 |
| Course Title | Accounting Overview | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$250.00 | Pre Req | |

Course Description

A two-hour high level demonstration of BOLO's accounting system features and functionality. The focus of this session is to provide end users with a base knowledge of our accounting module. This is a perfect session to introduce new employees to the BOLO accounting module, and a great refresher for those of you who have been on our system have not taken a look at new functionality. The cost for this session is \$250.00 per connection. There is a \$15.00 fee for no shows. Online training sessions are self registering from the <https://wellpointsystems.webex.com> site. To obtain a password please contact training@wellpointsystems.com.

Objectives

- Cost centers defined
- Storing of Division orders
- Overview of cost accounting
- Overview of cash receipts
- Overview of revenue accounting
- GL accounts financial reporting introduction



Training Agenda



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|---------------------|-----------------|-----------------------|------------------------------|
| Module | Core Accounting | CPE | 3 |
| Course Title | AP | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Live | | |
| Cost | \$300.00 | Pre Req | Navigation |

Course Description

The AP course is designed to introduce clients to the AP module in the BOLO Software. Participants will enter invoices, review set ups, and generate accounting distributions.

Objectives

- AP set up screens and AP process
- Generate invoices using registry program, data entry, invoice templates, and import process
- Reverse an AP invoice
- AP canned reports
- Approval process and how it effects AP entry



Training Agenda



| | | | |
|---------------------|----------------------|-----------------------|------------------------------|
| Module | Core Accounting | CPE | 1 |
| Course Title | Cash Receipts | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | Navigation |

Course Description

The Cash Receipts course will walk participants through the Cash Receipts Process and set up screens. The cost for this session is \$150 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the bolosystems.webex.com website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- Company set up for cash receipts
- Apply and approve cash receipts
- Research and verification of reports
- Cash receipts process



Training Agenda



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|---------------------|----------------------|-----------------------|------------------------------|
| Module | Core Accounting | CPE | 1 |
| Course Title | Chart of Accounts | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | Navigation |

Course Description

This course is designed to review the purpose of the Chart of accounts and how the BOLO software interacts with Chart of accounts. The cost for this session is \$150 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the <https://wellpointsystems.webex.com> website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- Chart of accounts
- Set up
- Changes to chart of accounts
- Set up Tracking Categories
- Account group set up and use



Training Agenda



| | | | |
|---------------------|----------------------|-----------------------|------------------------------|
| Module | Core Accounting | CPE | 1 |
| Course Title | GL Coding Controls | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | Accounting Overview |

Course Description

This class is geared towards accounting staff and deals with controls as they pertain to the general ledger, accounting period, and chart of accounts. The cost for this session is \$150 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the <https://wellpointsystems.bolosystems.webex.com> website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- Coding requirements
- Data entry
- Required information
- Coding restrictions



Training Agenda



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|---------------------|----------------------|-----------------------|------------------------------|
| Module | Land | CPE | 1 |
| Course Title | Division Order I | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | Navigation |

Course Description

Division of Interest is one of the culprits that make our industry, and our jobs, so complex. This course will review the various types of division of interests that can be built in the system- land, master, revenue distribution, and JIB. We will discuss how the calculations are performed- with a particular focus on burden-based decks. The cost for this session is \$150 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the bolosystems.webex.com website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- Division of interest definition
- Division of interest decimal calculations
- Land division of interest
- JIB deck options
- 2 types of revenue DOI's



Training Agenda



| | | | |
|---------------------|-----------------|-----------------------|------------|
| Module | Land | CPE | |
| Course Title | Division Orders | Field of Study | |
| Delivery | Group-Live | | |
| Cost | \$300.00 | Pre Req | Navigation |

Course Description

This course will review the various types of division of interests that can be built in the system: land, master, revenue, and JIB. Participants will build each type of DOI, understand how to make changes, and run reports using each type.

Objectives

- Set up new DOI in all 4 categories: land, master, JIB, and revenue
- Burden based revenue deck
- Changes to each type of DOI
- Reports to find all DOI's an owner is linked to and all DOI's for cost centers



Training Agenda



| | | | |
|---------------------|----------------------|-----------------------|------------------------------|
| Module | Land | CPE | 1 |
| Course Title | Division Orders II | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | Division Order I |

Course Description

This is the second Division Order class. Participants will create division orders from start to finish. They will learn how to copy division orders and import division orders. An overview of components will be provided. The cost for this session is \$150 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the bolosystems.webex.com website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- Create division order
- Import division orders
- Copy division orders
- Introduction to components



Training Agenda



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|---------------------|----------------------|-----------------------|------------------------------|
| Module | Land | CPE | 1 |
| Course Title | DOI Wizard | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | Navigation |

Course Description

The DOI Wizard is a separately licensed module that creates division orders using the NALTA form and transfer orders that are ready for mailing to owners. In this session we will review the process of creating division orders and the fields required in the DOI Wizard. The cost for this session is \$150 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the bolosystems.webex.com website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- Division order form
- Transfer order form
- User settings
- Templates



Training Agenda



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|---------------------|--------------------|-----------------------|---------------|
| Module | Land | CPE | |
| Course Title | Intermediate Lease | Field of Study | |
| Delivery | Group-Live | | |
| Cost | \$600.00 | Pre Req | Land Overview |

Course Description

This day will include a review of leases, the land payment process and contract administration. We will provide analysis tools that will assist with the reporting requirements of the land department.

Objectives

- Information captured in lease records
- Lease payment process
- Void lease payment checks
- Contract Maintenance for reporting purposes
- Canned land reports



Training Agenda



| | | | |
|---------------------|------------|-----------------------|------------------------------|
| Module | Land | CPE | 3 |
| Course Title | JIB | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Live | | |
| Cost | \$300.00 | Pre Req | Navigation |

Course Description

This course will walk you through all the setups required to process your joint interest bills. You will learn ways to make your processing more efficient by creating automated overhead entries, using cost center allocations and how to easily rebook your joint interest bills when an ownership change has occurred. This course will walk you all the way through printing your joint interest invoices.

Objectives

- Company setup to process joint interest billings
- Map 8/8ths accounts to net cutback accounts
- Set cost centers up to generate automatic overhead entries
- Reallocate costs that had been billed to an incorrect owner
- Change deck and session selection
- Correct transaction descriptions prior to printing invoices
- Cancel transactions so they do not appear on invoices (in and out transactions)
- Cost center allocation matrices and process allocations
- Reconcile JIB allocations with your GL
- Process and print JIB statements
- JIB accounting transaction process



Training Agenda



| | | | |
|---------------------|---------------|-----------------------|------------|
| Module | Land | CPE | 16 |
| Course Title | Land Overview | Field of Study | |
| Delivery | Group-Live | | |
| Cost | \$1200.00 | Pre Req | Navigation |

Course Description

This two day interactive course is designed to introduce users to the BOLO Land Module. The course assumes that the end user has taken our online Navigation and Name and Address Module. The cost for this course is \$1200.00 and includes the online fee for the Navigation and Name and Address course.

Objectives

- Navigation topics
- Land codes
- Lease data sheets
- One-tract lease set up
- Copy Leases
- Property information
- Contract information
- Land reports
- Land mass changes



Training Agenda



| | | | |
|---------------------|----------------------|-----------------------|------------------------------|
| Module | Land | CPE | 2 |
| Course Title | Land Query | Field of Study | Specialized Knowledge of App |
| Delivery | Group-internet-based | | |
| Cost | \$250.00 | Pre Req | Beg Query |

Course Description

The two hour Land query workshop is designed to assist end users how to query the attributes and files specific to the Land Model. Participants are required to complete the Beg Query class before attending. The cost for this session is \$250 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the bolosystems.webex.com website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- Review of Beg Query information
- Land dictionary items
- Creating a bridge between the LEASE and TRACT file
- Tips and Tricks for creating Land Queries



Training Agenda



| | | | |
|---------------------|----------------------|-----------------------|------------------------------|
| Module | Land | CPE | 1 |
| Course Title | Landworks | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | Land Overview |

Course Description

The Landworks sessions is designed to explain the Landworks extraction process, and enable the process to run on a nightly basis for incremental changes. The cost for this session is \$150 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the bolosystems.webex.com website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- Run the LandWorks extract for both a full and incremental export
- File structure for the Landworks export
- Incremental extract and enable application for recurring batch
- SYS3310 report



Training Agenda



| | | | |
|---------------------|-----------------------|-----------------------|------------------------------|
| Module | Land | CPE | 2 |
| Course Title | Lease Payment Process | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$250.00 | Pre Req | Navigation |

Course Description

Making Lease payments on a timely basis ensures that you do not lose a lease. The Lease Payment Process session is designed to walk you through the steps to verify and process payments due, troubleshoot problems, and create payments and financial entries. This session is appropriate for Land and Accounting personnel involved in the Lease Payment Process. The cost for this session is \$250 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the bolosystems.webex.com website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- Define Lease Payments
- Build Lease Payments in BOLO
- Review Monthly Reports
- Step Through the Lease Payment Process
- Describe Voids and Reversals



Training Agenda



| | | | |
|---------------------|----------------------|-----------------------|------------------------------|
| Module | Land | CPE | 1 |
| Course Title | Ownership Changes | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | Navigation |

Course Description

This session will review types of ownership changes and the appropriate process to use within the system. We will also explain the difference between with recourse and without recourse and how this decision effects processing. The cost for this session is \$150 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the bolosystems.webex.com website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- Ownership change authorization
- Mass land deck and ownership change process
- JIB deck and mass division order changes
- Reallocation of owner sales from assignments



Training Agenda



| | | | |
|---------------------|---------------------------|-----------------------|------------------------------|
| Module | Other | CPE | 1 |
| Course Title | Streamlining Acquisitions | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | Navigation |

Course Description

Acquisition activity has increased in the industry. BOLO can help you streamline the acquisitions by providing conversion services. This session will prepare you for what to expect during the integration of new properties or new companies. We will cover conversion options, tricks to prepare, and what to expect during each phase of the integration. The cost for this session is \$150 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the bolosystems.webex.com website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

All participants must register for the session using the registration password of bolotrain.

Objectives

- Acquisition types
- Conversion options
- Tools to get acquired information into the BOLO software
- Planning



Training Agenda



| | | | |
|---------------------|-----------------------------|-----------------------|------------------------------|
| Module | Production | CPE | 1 |
| Course Title | Monitoring Daily Production | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | Navigation |

Course Description

Monitoring production on a daily basis enables you to provide current information for decision-making and quickly react to changes in production volumes. BOLO lets you track and allocate production on a daily basis. This session will cover loading daily information (via manual entry or imports), daily allocations, and reporting on a daily information. The cost for this session is \$150 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the bolosystems.webex.com website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- Daily Allocations
- Capture daily Information
- Daily Allocation process
- Daily information reports



Training Agenda



| | | | |
|---------------------|------------|-----------------------|------------|
| Module | Production | CPE | |
| Course Title | Production | Field of Study | |
| Delivery | Group-Live | | |
| Cost | \$600.00 | Pre Req | Navigation |

Course Description

This course is designed to introduce clients to the BOLO production system and processes

Objectives

- Software uses of gathering systems, facilities, and completions
- Production set ups for meters, tanks, and equipment
- Workflow set ups for data entry and reporting
- Daily and monthly production
- Well tests and down time
- Allocation process



Training Agenda



| | | | |
|---------------------|----------------|-----------------------|------------------------------|
| Module | Reporting | CPE | 3 |
| Course Title | Advanced Query | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Live | | |
| Cost | \$300.00 | Pre Req | Beg Query |

Course Description

In this session we will be discussing querying multi valued attributes, building dictionary items, and formatting. A review of basic query is included in the session.

Objectives

- Query multi-valued attributes
- Utilize formatting commands to change the look and feel of queries
- Work with advanced verbs to save lists, and generate merge lists from multiple SELECT statements



Training Agenda



| | | | |
|---------------------|------------------------------|-----------------------|------------------------------|
| Module | Reporting | CPE | 4 |
| Course Title | Advanced Query Online Series | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$500.00 | Pre Req | Beg Query |

Course Description

The advanced query series is designed in four one hour sessions held each day in four consecutive days. Participants will increase their ad hoc reporting skills by participating in engaging exercises. The cost of this course is \$500.00 per connection. A \$50.00 no show fee will apply for cancellations received less than 24 hours prior to the start of the session.

Objectives

- Review of Beg Query
- Advanced Formatting
- Advanced Computation
- Advanced Commands
- Creating a Saved Query
- Querying multi values
- Building A dictionary item
- Creating an ad hoc virtual dictionary item



Training Agenda



| | | | |
|---------------------|------------|-----------------------|------------------------------|
| Module | Reporting | CPE | 3 |
| Course Title | Beg Query | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Live | | |
| Cost | \$300.00 | Pre Req | |

Course Description

Ad hoc reporting is a requirement for many of our clients that need a report to look a certain way with specific data. In this course participants will create ad hoc reports using the advanced search functionality and the Query Command Builder. The focus of this course is provide participants with a good foundation in being able to write their own query statements. The Beg query class is also offered in a four part online series which allows your group to the class from your office with up to five people attending.

Objectives

- Perform an ad hoc report using advanced search
- Create new query set
- Utilize query command builder to select dictionary items
- Construct query statements using the query verbs SELECT,LIST,COUNT, and SORT



Training Agenda



| | | | |
|---------------------|--------------------------|-----------------------|------------------------------|
| Module | Reporting | CPE | 3 |
| Course Title | Financial Report Builder | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Live | | |
| Cost | \$300.00 | Pre Req | Advanced Query |

Course Description

This course is designed to introduce clients to the BOLO Financial Report Builder. The Financial Report Builder is used to generate lease operating statements, AFE comparisons, cost center actual to budget comparisons, property ledger trail balances, and property ledgers.

Objectives

- Financial Report Builder
- Copy function to generate a report template
- Manipulate headings and captions to meet reporting needs
- Manipulate rows and column to change look and feel of report
- Using Calculations



Training Agenda



| | | | |
|---------------------|----------------------|-----------------------|------------------------------|
| Module | Reporting | CPE | 1 |
| Course Title | Intro to FRB | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | Intro to Spreadsheet Int |

Course Description

The BOLO software is delivered with a report writing tool and delivered the templates. The Report Writer allows users to create custom canned reports that are run from the BOLO Menu. In this course we will focus on the basics of the report tool writer. The cost for this session is \$150 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the bolosystems.webex.com website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- Access GL1280E- Financial Report Parameters Maintenance
- Access 'T' menu type templates
- Understand the User Parameters defined in the INC.1 template
- Make a copy of a delivered template
- Place the copy of the delivered template onto a user's menu panel
- Dissect columns, rows, and headers on the delivered INC.1 template



Training Agenda



| | | | |
|---------------------|--------------------------------|-----------------------|------------------------------|
| Module | Reporting | CPE | 1 |
| Course Title | Intro to Spreadsheet Interface | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | Beg Query |

Course Description

Spreadsheet interface uses an Excel spreadsheet to pull BOLO data. The Excel formulas pull data from the Bolo database, providing you real time access to information as data changes. In this session, we will cover the using the function wizards to dynamically pull data from the Bolo into a spreadsheet and generate an LOS. The cost for this session is \$150 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the bolosystems.webex.com website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

If you have questions please contact training@bolosystems.com.

Objectives

- Spreadsheet interface defined
- Terminology
- Connect to Spreadsheet interface
- Explanation and demonstration of SzTTcRead
- Explanation and use of DGLinfo
- Using GL3341- Detail Drill down to confirm results
- Demonstration
- Tips and tricks



Training Agenda



| | | | |
|---------------------|----------------------|-----------------------|------------------------------|
| Module | Reporting | CPE | 4 |
| Course Title | Online Query Series | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$450.00 | Pre Req | Name and Address |

Course Description

The Query online session is a four part session offered daily for one hour. The session is designed to teach end users the power of the Advanced Searches and Query Interface in ad hoc reporting. See the agenda for specific topics. Participants are required to attend all 4 sessions and will have assignments to complete after each session. The cost for the entire series is \$450.00. Multiple participants can attend on this same connection. Course materials will be sent to participants via email prior to the sessions. There will be a \$50 fee for No Shows. For questions please contact training@BOLOsystems.com.

Objectives

WQ1: Advanced Searches

- Advanced searches on lookup fields
- Cross reference window
- Sort data in cross reference window
- Export information to Excel
- Create saved lists
- Manipulate data in saved lists

WQ2: Basic Query

- Query sets for organization
- Generate comments and search comments
- Six step process in creating a query
- Dictionary items and file names
- Write LIST statement on the NAME file
- Export query to results tab, report viewer, and Excel
- Query security

WQ3: Working with Verbs

- Select statement
- Count records in a file
- Sum and Total commands
- Detail suppress for summary and detail queries



Training Agenda



- Break.on and Sort

WQ4: Formating

- Column spacing
- Basic headings
- Prompt for values
- Combination queries



Training Agenda



| | | | |
|---------------------|--|-----------------------|------------------------------|
| Module | Reporting | CPE | 1 |
| Course Title | Reporting Hierarchies/Drill Down Reports | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | Cost Centers |

Course Description

This course is designed to introduce end users to the power of Hierarchies and Drill Down reports in the BOLO Software. The cost for this session is \$150 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the bolosystems.webex.com website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- Hierarchies in the Drill Down applications, Financial Report templates, and Spreadsheet interface
- Sample hierarchy for set up and processing purposes
- GL1215 and how it is affected by a hierarchy



Training Agenda



| | | | |
|---------------------|-----------------------|-----------------------|------------------------------|
| Module | Reporting | CPE | 3 |
| Course Title | Spreadsheet Interface | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Live | | |
| Cost | \$300.00 | Pre Req | Beg Query |

Course Description

This course will work with the Excel Spreadsheet add in to interactively work with the data stored in the BOLO Software. The Spreadsheet Interface increases your ability to generate LOS statements out of the Bolo software.

Objectives

- Connect to the Spreadsheet interface
- Use the szTtcRead and dGIInfo functions to dynamically pull data from BOLO to Excel
- Fill out table, tuple, and column fields to pull desired data
- Generate LOS using the Spreadsheet interface
- Review sample templates
- Creating SELECT statements using DAV



Training Agenda



| | | | |
|---------------------|----------------------|-----------------------|------------------------------|
| Module | Revenue | CPE | 1 |
| Course Title | CDEX | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | Drop Off |

Course Description

BOLO provides a separately licensed tool to automate the receipt and distribution of Revenue Check Detail. The CDEX module allows users to review the check prior to creating a batch, prevent duplicate check input, create revenue vouchers, and create CDEX files to send check data to owners/payees. The cost for this session is \$150 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the <https://wellpointsystems.webex.com> website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- CDEX set up screens
- Setup company to receive and send CDEX files
- Receive and process a CDEX file
- Process and send a CDEX file
- Run CDEX reports



Training Agenda



| | | | |
|---------------------|----------------------|-----------------------|------------------------------|
| Module | Revenue | CPE | 3 |
| Course Title | Revenue Accruals | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$250.00 | Pre Req | Revenue Processing |

Course Description

This course will review the revenue process and will focus on the revenue accrual process.

Objectives

- Revenue system set up
- Accrual methods
- Generate relative price index
- Load accrued oil and gas entries using data entry screens and upload
- System generated calculations



Training Agenda



| | | | |
|---------------------|----------------------|-----------------------|--------------------------------|
| Module | Revenue | CPE | 3 |
| Course Title | Revenue Adjustments | Field of Study | Specialized Knowledge of Appli |
| Delivery | Group-Internet-Based | | |
| Cost | \$250.00 | Pre Req | Revenue Processing |

Course Description

The BOLO System offers many opportunities and ways to create and process Revenue Adjustments. These include adjustments based on user-defined assignments, pay code changes, reversals and rebooks, and adjustments at the owner level. Some of the methods we will discuss can be used to adjust division orders and owners in the Joint Interest Billing System and Land System.

Objectives

- Create and process Ownership Change Authorizations
- Apply Ownership Change Authorizations to Revenue Division Orders and Unpaid Owner Sale Items
- Modify Pay Codes on Owner Sale records
- Create and upload individual Owner Sale records
- Reverse and Rebook Revenue Sales



Training Agenda



| | | | |
|---------------------|----------------------|-----------------------|------------------------------|
| Module | Revenue | CPE | 3 |
| Course Title | Revenue Process | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$250.00 | Pre Req | Revenue Set ups |

Course Description

This course is designed to introduce clients to the Revenue process in the BOLO software and assist them in making the business process decisions required to set up the revenue system. Participants will learn how to process and review current months revenue.

Objectives

- Enter/Upload gross sales
- Review prior month's adjustments due to price or volume corrections
- Reconcile revenue processed to sub-ledgers and general ledger
- Process revenue checks



Training Agenda



| | | | |
|---------------------|-----------------|-----------------------|------------------------------|
| Module | Revenue | CPE | 3 |
| Course Title | Revenue Set ups | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Live | | |
| Cost | \$300.00 | Pre Req | Navigation |

Course Description

Set up of the GWiz Revenue System will requires some time and consideration. There are a variety of options that make the system flexible to all calculation, owner sharing and purchaser receivable needs. The time spent setting up the system correctly for your needs will reduce the time spent in revenue entry each month. The following sections will explain considerations to take when completing your set up to make the system work most efficiently for you.

Objectives

- Company Set up
- Balancing Owner Set up
- Minimum Suspense Code
- Sale types
- Tolerance amounts
- Transaction Types
- Review of Components



Training Agenda



| | | | |
|---------------------|-----------------------|-----------------------|------------------------------|
| Module | System Administration | CPE | 1 |
| Course Title | Audit Logging | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | Navigation |

Course Description

The audit log module is a separately licensed module. This session is designed to review the set ups and benefits of using audit logging to meet SOX compliance. The cost for this session is \$150 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the <https://wellpointsystems.webex.com> website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- Benefits of Audit Logging
- Role of Before Update and Before Delete triggers
- Audit log profile set up
- Audit Log Report for reporting requirements



Training Agenda



| | | | |
|---------------------|--------------------------------------|-----------------------|------------------------------|
| Module | System Administration | CPE | 1 |
| Course Title | Basic Security System Administration | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | Navigation |

Course Description

The BOLO software includes tools for the System Administrator to handle user and global settings, review locks and error messages, review licensing, and control required prompts. In this session we will work with the individual applications and reports that assist the System Administrator in troubleshooting and monitoring the activities in the BOLO software. The cost for this session is \$150 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the <https://wellpointsystems.webex.com> website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- Change/Review system and user global settings
- Set up the Approval process
- Handle processes and user messages
- Review locks
- Check license usage
- Set up prompt-level security



Training Agenda



| | | | |
|---------------------|-----------------------|-----------------------|------------------------------|
| Module | System Administration | CPE | 1 |
| Course Title | Batch Processing | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | Navigation |

Course Description

Users have a need to run reports or processes automatically- without user intervention. BOLO Batch Process provides this functionality. This session will teach users the steps required to set up a batch to run on a scheduled basis, how to monitor the batch, and how to use the Bolo export utility to generate .txt or .csv files for importing to an outside database. The cost for this session is \$150 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the <https://wellpointsystems.webex.com> website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- Purpose of batch processing
- Edit recurring batch jobs
- Create queues
- Enable batches
- Monitor batches
- Batch processing process Flow



Training Agenda



| | | | |
|---------------------|-----------------------|-----------------------|------------------------------|
| Module | System Administration | CPE | 1 |
| Course Title | Document Management | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | AP Entry I |

Course Description

Several BOLO customers are using third party vendor invoicing approval software that allows you to route accounts payable invoices for approval electronically. This session will cover the current options available, how they are being used, and the integration impact. The cost for this session is \$150 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the <https://wellpointsystems.webex.com> website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- Document management set up
- Index invoices upon data entry and after
- Run Reports
- Third party vendor workflow options



Training Agenda



| | | | |
|---------------------|-----------------------|-----------------------|------------------------------|
| Module | System Administration | CPE | 1 |
| Course Title | Menus and Profiles | Field of Study | Specialized Knowledge of App |
| Delivery | Group-Internet-Based | | |
| Cost | \$150.00 | Pre Req | Navigation |

Course Description

In this session we will review the fields and tabs required to complete a BOLO user profile. Participants will create a template user to base profiles and menus off of, and will run reports to verify setups. The Menu Maintenance record will be manipulated to remove folders from the BOLO Navigation panel, and to change application rights to read only. The cost for this session is \$150 per connection. There is a \$10 fee for No Shows. Online training sessions are self-registering through the bolosystems.webex.com website. To obtain a password, or for any questions, please email training@wellpointsystems.com.

Objectives

- Identify the importance of the fields on BOLO user profile
- Create a template user
- Understand the difference between referencing and copying a profile
- Manipulate the BOLO Navigation Panel to remove access to folders
- Create Read only rights to a data application
- Verify user profile rights using reports and advanced searches



Training Agenda



Online Courses:

Online courses are conducted via the web and are eligible for CPE credits. Online courses are charged per connection. A connection is considered one site with no more than five participants. Materials and conference call information are sent to the person that registers for the session. All online courses are self registering contact training@wellpointsystems.com for a password and registration instructions. A \$15.00 no show fee will be assessed for cancellations not received before the deadline. Charges for online connections are as follows:

| | |
|--------------------------------|---------------------|
| 1-5 participants 1 connection | \$150.00 (Per Hour) |
| 5-10 participants 1 connection | \$200.00 (Per Hour) |
| 10 + participants 1 connection | \$250.00 (Per Hour) |

NOTE: Please refer to the course catalog pricing for multiple hour and day course prices.

Public Courses:

We offer training in both of our Denver and Houston Training Facilities for our clients and post the monthly training calendar to our website. The prices for training courses offered in our training facilities are as follows:

| | |
|-----------------|---|
| Half day Course | \$300.00 (per student for 1-2 registrations) |
| | \$250.00 (per student for 4-6 registrations) |
| | \$200.00 (per student for 7-12 registrations) |
| Full day course | \$600.00 (per student for 1-3 registrations) |
| | \$500.00 (per student for 4-6 registrations) |
| | \$400.00 (per student for 6-12 registrations) |

Onsite Courses:

Please contact the Training Department for a quote for onsite training sessions.

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