

FSI (FM Solutions) Limited

Concept™ Clients and Invoicing

Introduction

The Clients and Invoicing module allows users to record details and specify preferences pertaining to the client and invoicing arrangements, applicable to their contract divisions within Concept™. It allows system users to issue invoices and record payments without having to resort to an external accounting package.

This course has been designed to introduce attendees to the core aspects of the module and its relationship with your core Concept™ system.

Target Audience

This one-day course is ideally suited for Concept™ users who are responsible for the generation of Invoices for work undertaken and recorded within the Concept™ base system.

Course Content

- Base System Considerations
 - Overview of System Security
 - General system setup – Payment Terms, Notice Periods and Invoice Types
 - Contract creation & configuration
- Setting up the Clients and Invoicing module
- Creating invoices
 - Modifying an invoice
 - Activating an invoice
 - Authorising an invoice
 - Deleting an invoice
 - Creating a manual invoice
 - Creating credit notes
 - Recording payments
- Searching for invoices
- Invoicing Reports
- Invoice Issues

Relevant queries to be answered throughout the course.

Certification

Upon completion of the course, a certificate will be issued to all candidates who have demonstrated a satisfactory level of competence.