

Concept Evolution™:

Sales Invoicing Module



The Sales Invoicing Module for Concept Evolution™ manages the invoicing of scheduled tasks (fixed and variable amounts), reactive tasks, facilities bookings and projects-based tasks throughout the period of a contract. Any charges raised automatically comply with rules defined against contracts in line with agreed client-pricing policies, and invoicing rates can be setup accordingly.

Invoice layouts can be defined and produced specifically for each contract, including labour, materials, expenses and other chargeable elements. Alternatively, automated transfer of invoice details can be provided for upload into finance and accounting systems.

The powerful 'Rules Engine' in Invoicing allows users to setup the invoicing method most suitable to their organisation, including entities and values (contract, location, building etc).

A number of simple rules are included:

- tasks to be invoiced at cost
- tasks to be invoiced at cost+
- tasks to be invoiced based on a schedule of rates
- contracts to be invoiced on a schedule basis
- facilities bookings to be invoiced at cost
- facilities bookings to be invoiced at cost+

Invoices can be created directly from the entity you wish to invoice, for example:

- Tasks can be invoiced from the Advanced Helpdesk
- Bookings can be invoiced from Booking Details
- Purchase Orders can be invoiced from Purchase Order Details
- Projects can be invoiced from Project Details

Features of the Sales Invoicing Module include:

- Define a Master Schedule of Rates as the template for any schedule of rates created for/applied to each Contract

Invoicing Rates include:

- Schedule of Rates
- Actual Cost of tasks based on labour values per task
- Actual Cost+
- Discipline Rates
- Contract Value

- Copy rules from one contract to another, to allow templates for invoicing to be setup and copied
- Cost Centre based and Contracts based invoice generation
- Periodic and task-specific invoicing
- Authorisation thresholds

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