

Course Content (½ day)

Sales Dashboard

- Create new sales transactions
- Send statements
- Import sales
- Invoices summary
- Search sales transactions
- View top 5 debtors
- The cash chart
- Quotes summary
- Billable expenses summary

Invoice settings

- Standard invoice templates
- Custom invoice templates
- Invoice default settings
- Payment services
- Automatic invoice reminders

Sales transactions

- Invoices
- Repeating invoices
- Quotes
- Credit notes

Quotes

- Create a new quote
- Mark quote as accepted
- Convert quote to invoice
- View expired quotes

Billable expenses

- View billable expenses
- Billable expenses report
- Add billable expenses to invoice

Managing debtors

- Send statements
- Custom invoice reminders
- Aged receivables summary report
- Aged receivables detail report
- Receivable invoice detail report
- Receivable invoice summary report