

Course Agenda

Standard Billing & Accounts Receivable

Sage 300 CRE | Instructor: Deborah Lastro

Course Overview

This 2-hour class is designed to give basic training for those employees who handle routine processing tasks. It is ideal for new employees, as well as those wishing to gain a general understanding of the module.

Agenda

- **Setup**
 - Setup Customers / Contacts (AR)
 - Setup Contracts (CN)
 - Standard
 - Active
- **Invoices (Billing)**
 - Enter Quick Bills
 - Enter Progress Invoices
 - Bill Retainage
 - Print Invoices
 - Post Invoices
 - Creating Standard Items
 - Synchronizing Billing Records with Contract Items
- **Receivables**
 - Adjust Receivables
 - Enter Cash Receipts
 - Age Receivables
 - Generate Finance Charges
- **Reporting**
 - Review Reports and Inquiries