

SERVICE MANAGER 3.0

by Bluelight Software, LLC

Advanced Training Outline

Contract Pricing (Price Rules)

- View a Contract
- Modify an Existing Contract
- Add a New Contract
- Pricing Header
- Pricing Lines
- Price Type
- Pricing Type
- Delete a Contract
- Contract Reports

Site Service Schedules

- View a Schedule
- Generate Invoices
- Transfer Customer Schedules
- Automatic Invoice generation
- Service Item Cancellation
- Supplemental Work Orders
- Review Reports

User Access and Security

- Review User Maintenance
- Security Classes
- Security Levels
- Cloning Security Class
- Setup new Security Class
- Assign Security Class to User

Reports

- Review all Reports

System Options/Preferences

- Item Information
- Customer Information
- Site Service Scheduling
- Miscellaneous
- Order Entry/Invoicing

System Configuration

- General
- System Log
- Integrity Test

AR Scenarios

- Print Customer Statement
- Record Payment at Time of Invoice
- Apply Payments to Invoices
- Batch Balancing
- Partial Payments
- Reverse a Check
- Unapplied Payment
- Write Off Unpaid Invoice Amount
- Write Off Multiple Invoices
- Reverse an Invoice Payment
- Adjust a Paid Invoice

Order Entry/Invoicing

- Rebilling a credited Invoice
- Invoice Adjustments
- Prior Period Invoice Editing

Customer Management

- Temporary Customer Number Assignment
- Duplicate Customer Consolidation