

This hands-on training class takes an in-depth look at the back office features of Integra.

Master File Maintenance

- Main menu review
- Customer maintenance
 - Email/PDF invoice
 - Email/PDF Statements
- Job maintenance
 - Invoice credit control
 - State job – prevailing wages*
- Product maintenance
- Product restriction and moving quotes to product restriction
 - Setting up alternate mix descriptions on jobs
- Setting up cash and terms discounts
- Setting up automatic charges like Winter Service, Minimum Load, etc.
- Use of credit codes
- Credit control – Credit limit vs. invoice credit control
- Setting up credit codes along with display text
- Show/Print prices on orders for COD customers
- Setting up notes on a job for dispatch to see when entering in an order
- Ability to see cash posting notes in Open Inquiry
- New taxing option – tax by Origination

Pricing

- Different levels of the pricing hierarchy
- Job
- Customer
- Product
- Job price and product update tool for performing price increases

Ticket Maintenance

- MA ticket load and options available for loading tickets
- Ticket Maintenance – New and improved.
 - Search order/tickets/invoices
 - Save order
 - Screen reformatted for ease of use
 - Advanced filter sorts
- Using tax code 99 to make a product “no charge”
- Manual ticket entry
- Placing tickets on hold/ group hold
- Automatically via “Must Review”

Invoicing

- Invoice filters
- Invoice Email/PDF
- Re-Emailing an invoice
- Warehousing and moving invoices to one central folder on the network

- Invoice credit update
- Invoice inquiry

COD Posting

- COD posting to ticket
- Recovering a COD posting

Cash Posting

- Deposits, Payments & Summary tabs
- Credit/Debit memos
- Tax adjustments
- Auto pay feature
- Ticket/invoice amount search
- Paying certain invoices automatically (e.g. how to pay oldest invoices automatically)
- Unapplied cash record – create automatically or manually
- Processing rebills
- Reversing payments
- Rollback vs. Recovering a payment
- Return Cash
- Unsubmitting a deposit
- How to apply a discount
- Manually adding a discount
- Ability to set up location security for users to only see transactions for specific locations

Miscellaneous

- COD Receipt Log report
- AR Report Wizard & Back Office reports
- AR Month End processes

