

iSupport[®] Training Course

PURCHASING & BILLING

DESCRIPTION:

Comprehensive purchasing functionality enables you to manage the complete lifecycle of the IT service process, and track all aspects of a project from start to finish. Request and track products and services, and associate those requests with Incident, Problem, Change, and Asset records. Record time worked and charge it back against purchase orders. Bill time and materials via comprehensive reports. This course typically runs up to three hours.

TOPICS COVERED:

- Purchasing Overview
- Configuration Options
- Designating Vendors
- Creating Product Records
- Creating and Updating Purchase Requests
- Purchase Request Templates
- Purchase Requests and the End User Desktop
- Q&A as Needed

COST: \$550 per seat
LOCATION: Online
SCHEDULE: 2-5 days in advance

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AGENDA:

Overview – Products and Purchase Requests

Enabling Purchasing in Configuration

- Enabling Purchasing functionality in the Global Configuration screen
- Setting Support Representative Profile permissions

Designating Vendors

- Designating customers
- Designating companies
- Designating support representatives

Creating Product Records

- Creating asset types
- Using the Product screen
- Associating with Customer, Company, or Support Representative records
- Using the Vendor Import feature

Configuring Options for Purchase Requests

- Enabling custom fields, customer work history, statuses, and approvals
- Setting up notifications for purchasing events
- Creating custom status levels
- Creating cost centers and job functions
- Creating approval cycles

Creating and Updating Purchase Requests

- Using the Purchase Request screen
- Associating work items
- Charging and deducting via history the Incident and Change screens

Creating Purchase Request Templates

Using the End User Desktop to Create and View Purchase Requests

- Configuring the Purchase Request Display and Submission screens
- Setting purchase request options in the Customer Profile and Company screens
- Submitting purchase requests via the End User Desktop
- Viewing purchase requests via the End User Desktop

Q & A as Needed

* Agenda subject to change at presenter's discretion