

Agenda - Proactis Management Console Training

Sessions 1 - Proactis Management Console Basic Set Up

Duration: 3 hours

Audience: System administrators from existing Proactis clients

Key Areas Covered: Users, Suppliers, Items and Templates

Key Objectives: To be able to manage user profiles, create and edit items, maintain suppliers and understand how this impacts on the creation and management of documents (Invoices & purchase orders).

Areas Covered

Users	Items
<ul style="list-style-type: none"> User Details User Addresses User Groups Roles and role properties User Departments Authorisation Pools References Accounting Elements Message Subscriptions Stand-In Authorisers and schedules 	<ul style="list-style-type: none"> Item Set up Supplier Links Item Groups Nominals Item References Generic versus catalogued items Value versus Unit Price items
Suppliers	Templates
<ul style="list-style-type: none"> Supplier Details Branches Invoicing Options Supplier Groups PO Auto Output 	<ul style="list-style-type: none"> Invoice and Purchase orders template set up Item Security User Security Supplier Security Reference Fields Nominal Mask Priority

Delivery

The session will be delivered online via MS Teams to a group of up to 8 individuals