

Accelerator Product Training for Contracts & Billing –

Instructor Led Workshop Overview

Accelerator Product Training for Contracts and Billing will help you configure your Autotask for efficient, accurate billing with every cycle. Starting with the configuration of contracts and ending with the configuration of invoices, this instructor-led workshop training will document and automate your billing arrangements.

Learning Objectives

After attending this live, instructor led workshop, you will be able to:

1. Create contracts using your company standards to ensure accurate set-up every time.
2. Represent the most common industry billing arrangements in Autotask.
3. Learn tips for reviewing time, costs and services to prepare for billing.
4. Create clear and concise invoices for each type of billing item.

Why attend

- There is no cost to the workshop for members of the Autotask Community.
- This is live, instructor led workshop training delivered in an intimate, classroom setting.
- It is a great opportunity to network with your peers, take a tour of the Autotask office and meet your account manager and support resources.
- Enjoy a complementary lunch and a post workshop happy hour with Autotask executives, managers and other Autotask resources.
- Walk away with PPT handouts, and step by step workbooks

Prerequisites

- ✓ You need a login to your Autotask account so you can work in your Autotask system.
- ✓ It is not required, but if you have admin rights, or someone else from your company attends with has admin rights, you could update your Autotask system live during the workshop.

Agenda

- 9:00 am Registration, networking, office tour
- 10:00 am Accelerator product training for Contracts & Billing
- 12:30 pm Complimentary lunch provided by Autotask
- 1:00 pm Accelerator product training for Contracts & Billing
- 4:00 pm Wrap-up, end of workshop

Location

- The Workshop is held at our U.S. HQ at 26 Tech Valley Drive, East Greenbush, NY 12061