

SynergySoft End of Year Rates & Billing

Overview

This course is designed to provide new users of SynergySoft with comprehensive knowledge of all programs and processes necessary to perform End of Year Rates processes and Billing in the SynergySoft financial modules.

Those wishing to take advantage of a refresher would also benefit from attending this course.

Who You Are

Attendees will need to have:

- Knowledge of Western Australian Local Government Rating functions and concepts
- Knowledge of SynergySoft Rates and Property Systems
- Fundamental knowledge of computers

Learning Outcomes

Understanding of End of Year Rates including:

1. Interim/Property Transactions
2. Pensioners – Checking and Final Rebate Claims
3. Raising Interest Charges, Offsetting Excess Receipts, Write Off Small Balances & Open Items
4. ESL – Returns
5. Final Balancing and Reports in Rates
6. Rates GL Settings
7. The Rates End of Year Process
8. Checks After End of Year Process
9. Pensioners Deferred Claim
10. Preparation for Rate Billing



11. Rate Billing Process

Please note this course will *not* cover any aspects of the following areas, for which separate courses are available:

- Interim Rating, Subdivisions and Amalgamations
- Senior and Pensioner Rate Processing
- Rates Modelling
- Introductory Rates & Property Essentials