Finance administration

Record the fleet’s costs once, allocate them to radios and follow each entry back to its source. Finance is an online administrative ledger; ordinary site users do not receive its amounts.

Test edition. Use the training workspace or an approved test site.

Follow the task

1. **Open authorised administration**

   Choose Online administration and select the correct company/site. A company owner grants financial read, entry/import, approval and export separately. Billing permission alone does not grant Finance.

2. **Choose the cost basis**

   Use Invoice for an actual invoice and Estimate for a planning figure. Select purchase, hire, service, repair or spares as appropriate. Keep GBP and USD separate; no exchange rate is silently applied.

3. **Link the source**

   Choose the exact radio(s), job, supplier hire, fault or service that the cost belongs to. Enter the supplier, invoice/reference, date and cost centre. Avoid entering the same invoice again under another category.

4. **Review allocations**

   For one invoice covering several radios, choose a supplier hire or Split this invoice across several radios. Review the allocation before saving. Use the exact allocation to link eligible costs to a reviewed handover.

5. **Review site proposals**

   Grant Cost proposals to managers who can submit an amount and its reference. Open Cost proposals to post it or return it with a reason. The ledger starts counting the cost when finance posts it.

6. **Import in bulk**

   Download/use the Finance CSV columns. Upload the file, match its references and inspect every result. The retained preview is tied to the current company, site and user. Correct duplicates or invalid references before committing. A changed ledger requires a fresh review.

7. **Review and report**

   Filter by date, radio, job, cost centre or type. Keep estimates separate from invoiced totals. Open an entry for its source and recorded-by details. Approval records administrative review; it is not proof that a supplier was paid.

8. **Correct with a retained record**

   Use the full-credit correction path against the original invoice, then record a replacement invoice if necessary. The original stays visible. Partial credits are not currently supported.

9. **Export only your authorised view**

   Use Export CSV or the print preview. Export permission is separate from read permission. Check the selected site, filters and currency before sharing the report.

If something is unclear

I cannot see Finance

Ask the company owner for the appropriate administrative grant and sites. Site operation or billing access does not imply access to confidential costs.

A figure looks doubled

Check invoice references, estimates versus invoices and per-radio allocations before entering another cost. Shared allocations should sum to the single source invoice.

Keep original records and backups. For support, use Settings → Help and problem reports, or office@i-enterprise.co.uk. A problem report is not a backup.

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