

Introduction	0-1
Welcome	0-1
Microsoft Dynamics Courseware Contents	0-2
Documentation Conventions	0-3
Student Objectives	0-4
Chapter 1: Overview and Setup	1-1
Objectives.....	1-1
Introduction.....	1-1
Set Up Options	1-2
Record Transactions	1-3
Inquiries and Reports	1-5
Sales Order Setup Preferences.....	1-6
Sales Order Data Entry Defaults	1-10
Sales Order Document Defaults.....	1-11
Posting Options and Maintaining History	1-12
Sales Order Setup Options	1-13
Setting up Master Document Types	1-18
Sales Quote Setup Window	1-20
Lab 1.1 - Setting Up a Quote.....	1-24
Sales Order Setup Window	1-25
Lab 1.2 - Setting Up an Order	1-29
Sales Back Order Setup Window	1-31
Lab 1.3 - Setting Up a Back Order	1-34
Sales Invoice Setup Window	1-35
Lab 1.4 - Setting Up an Invoice	1-38
Sales Return Setup Window	1-40
Lab 1.5 - Setting Up a Return.....	1-41
User-Defined Fields Setup	1-42
Numbers Assigned to Sales Documents	1-43
Sales Process Holds Setup.....	1-45
Prospect Maintenance.....	1-48
Customer Item Setup	1-50
Summary	1-54
Test Your Knowledge	1-55
Quick Interaction: Lessons Learned.....	1-57
Solutions.....	1-58
Chapter 2: Entering Quotes, Orders, Back Orders, and Returns	2-1
Objectives.....	2-1
Introduction.....	2-1
Sales Batch Entry	2-4
Document Information	2-7
Line Item Information.....	2-15
Line Item – Quote	2-20
Lab 2.1 - Entering a Quote	2-22
Line Item – Order	2-26
Lab 2.2 - Entering a Order.....	2-29
Line Item – Invoice	2-32

Line Item – Back Order	2-33
Line Item – Return	2-35
Total and Payment Information	2-37
Lab 2.3 - Entering an Invoice	2-42
Lab 2.4 - Entering a Return	2-46
Sales Distribution Entry	2-48
Commission Entry	2-49
Sales Process Holds	2-50
User-Defined Fields.....	2-51
Summary	2-52
Quick Interaction: Lessons Learned.....	2-55
Solutions.....	2-56

Chapter 3: Using Special Item Types 3-1

Objectives.....	3-1
Introduction.....	3-1
Non-Inventoried Items	3-2
Drop Ship Items.....	3-2
Serial Numbered Items.....	3-3
Lot Numbered Items.....	3-5
Selecting Serial or Lot Numbered Items.....	3-6
Sales Kit Options.....	3-7
Summary	3-10
Test Your Knowledge	3-11
Quick Interaction: Lessons Learned.....	3-12
Solutions.....	3-13

Chapter 4: Printing, Posting and Transferring Documents 4-1

Objectives.....	4-1
Introduction.....	4-1
Print Sales Documents	4-2
Print Multiple Documents	4-5
Posting Process	4-9
Transfer Sales Documents.....	4-10
Sales Quantity Status Window	4-17
Summary	4-24
Test Your Knowledge	4-25
Quick Interaction: Lessons Learned.....	4-26
Solutions.....	4-27

Chapter 5: Fulfilling, Allocating, and Committing Documents 5-1

Objectives.....	5-1
Introduction.....	5-1
Allocating Item Quantities.....	5-2
Allocation by Line Item	5-3
Allocating by Document or Batch	5-7
Lab 5.1 - Processing a Kit with Item Shortages.....	5-10
Sales Order Fulfillment.....	5-13
Lab 5.2 - Fulfilling Invoice Quantities.....	5-15
Sales Holds Processing	5-17

Creating Purchase Order Commitments 5-20
Lab 5.3 - Manual Purchase Order Commitment..... 5-26
Automatic Purchase Order Commitments 5-29
Lab 5.4 - Entering an Order and Creating a New Purchase Order..... 5-38
Summary 5-43
Test Your Knowledge 5-44
Quick Interaction: Lessons Learned 5-46
Solutions..... 5-47

Appendix A: Job Aids **A-1**

Sales Order Processing Overview..... A-1
Sales Order Processing Integration..... A-2
Sales Order Processing Setup Checklist..... A-3
Sales Order Processing Reports A-4
Microsoft Office Word Reports A-10

Appendix B: Case Study **B-1**

Sales Order Processing Case Study B-1
Sales Order Processing Case Study Solution..... B-13

