



Authorized Partner

## CONTENTS

Welcome  
 Integration  
 The Company  
 Setting Up Sales Order  
 Sales Order Options  
 General Ledger Account Maintenance  
 Defining Miscellaneous Changes  
 Setting Up Shipping Rates  
 Entering Purchase History for Customers  
 Cancel/Reason Code Maintenance  
 Converting from Another System  
 Daily Processing  
 Entering Sales Orders  
 Master Orders  
 Repeating Orders  
 Price Quotes  
 Printing Sales Orders  
 Printing Picking Sheets  
 Printing Shipping Labels  
 Entering Customer Deposits  
 Drop Ship Report  
 Reports for Tracking Orders  
 Shipping  
 Shipping Setup Options  
 Shipper ID Maintenance  
 Processing Using the Shipping Features  
 Shipping Data Entry  
 Packing List Printing  
 Entering Invoices  
 Automatically Generating Invoices from Orders  
 Entering Invoices  
 Debit and Credit Memos  
 Printing Invoices  
 Generating C.O.D. Labels  
 Printing Daily Sales Reports and Updating  
 How to Settle Credit Card Payments  
 Reports & Inquiry Options  
 Inquiry Options  
 Accounts Receivable Reports  
 Sales Order Reports  
 Period End Processing

## Syllabus

Section	Subject	Time Estimated
1	Welcome and Introduction	10 min
2	Setting Up S/O	60 min
3	Sales Orders/Daily Processing	90 min
4	Lab	20 min
5	Shipping	75 min
6	Invoicing and Updating	60 min
7	Inquiry Options and Reports	30 min
8	Period End Processing	15 min
9	Review	10 min
10	Lab	20 min
	<b>Total Time</b>	<b>390 min or 6 1/2 hours</b>

## Sales Order Objectives:

- Understand the capabilities of Sales Order.
- Learn the steps necessary for setting up the module, as well as how it integrates with the other modules.
- Learn how to create sales orders including standard, master orders, repeating orders, and price quotes.
- Learn the steps necessary to ship orders.
- Learn how to automatically and manually select orders for invoicing.
- Learn how to print the necessary sales reports and update Sales Order and General Ledger.
- Learn how to use the reports and inquiry options, as well as how to close the period in Sales Order.