

ACCPAC TRAINING OUTLINE FOR THE ORDER ENTRY MODULE

Setup Order Entry

- Options
 - Company Page
 - Processing
 - Calculate Backorder Quantities
 - Allow Quantities Shipped on Orders
 - Keep Transaction History
 - Default Template Code
 - Aging Periods
 - Keep Sales History
 - Accumulate by
 - Period Type
 - Sales Statistics
 - Keep Sales Statistics
 - Allow Edit of Statistics
 - Accumulate by
 - Period Type
 - Track Commissions
 - Commission by % or margin
 - Documents Page
 - Document Type
 - Length
 - Prefix
 - Next Number
 - Order Page
 - Optional Field
 - Use
 - Title
 - Optional Table
- Define Ship-Via Codes
- Define Templates
 - Order
 - Customer
- Define Miscellaneous Charges
- Define Salesperson Commission Rates

Entering Quotes, Orders, Invoices

- Order Types
 - Active
 - Future
 - Standing
 - Quote
- Order/Invoice Entry
 - Order Page
 - Customer Number
 - Template Code
 - Order Date
 - Order Type
 - FOB point
 - On Hold
 - Location
 - Description, Reference, Comment
 - Customer
 - Customer Type
 - Ship-To Location
 - Ship Via
 - Expected Ship Date
 - Price List
 - Territory
 - Tax Group
 - Customer PO No.
 - Terms

In our course you will get an overview of the module and learn the methodology of the program to develop a more thorough understanding of its functions. We will guide you through the setup options stage and show you how we customize the program to suit your particular business needs. We also cover formatting options for Order Entry Documents, crucial aspects of accurate report generating, and important year-end closing procedures including the pros and cons of and when to clear data.

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- Detail Page
 - F9
 - Line No.
 - Type
 - Item No.
 - Misc. Charge
 - Description
 - Price List
 - Location (F5)
 - Expected Ship Date
 - Quantity Ordered
 - Unit Price
 - Quantity Shipped
 - Serial Numbers
 - Comments/Instructions
 - Taxes
- View Item or Customer History
- Optional Fields
- Sales Split
- Totaling Orders/Invoices
- Prepaying Orders/Invoices
- Posting orders/invoices
 - Exceeding credit limits
- Shipping previously entered orders
- Adding details to existing orders

Returns and Credit Notes

- Credit Note
 - Invoice No.
- Customer
- Detail
 - Credit Type
 - Serial Nos.
- Optional Fields
- Sales Splits

Printing Reports

- Forms
 - Order Confirmation
 - Picking Slips
 - Shipping Labels
 - Invoices
 - Credit Notes
- Analysis Reports
 - Transaction List
 - Order Action
 - Aged Orders
 - Posting Journals
 - Sales History
 - Sales Statistics
 - Salesperson Commissions

Clearing History

- Transaction History
- Sales History
- Sales Statistics
- Salesperson Commissions
- Posting Journals

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