



Authorized Partner

CONTENTS

- Welcome
 - Integration
 - The Company
- Setting up Inventory Management
- Inventory Management Options
- General Ledger Account Maintenance
- Pricing Options
- Price Code Maintenance
- U/M Conversion
- Warranty Codes
- Product Lines
- Warehouse Codes
- Buyer/Planner Code
- Bar Code Printer Maintenance
- Entering Inventory Items
- Sales Promotions
- Kits
- Converting from Another I/M System
- Processing Inventory Management Transactions
 - Entering Transactions
 - Updating Transactions
 - Negative Cost Tiers
 - Physical Inventory
- Reports
 - Inventory Item Reports
 - Tracking Transactions
 - Management Reports
- Additional Options
 - Automatic Cost/Price Change
 - Inventory Management Utilities
 - Period End Processing

Syllabus

Section	Subject	Time Estimated
1	Welcome and Introduction	20 min
2	Setting Up I/M	150 min
3	Lab	20 min
4	Processing	60 min
5	Additional Processing	45 min
6	Reporting in I/M	30 min
7	Utilities and Period End	30 min
8	Review	15 min
9	Lab	20 min
	Total Time	390 min or 6 1/2 hours

I\M Objectives:

- Understand the features and capabilities of I/M
- Learn how to setup Inventory Management
- Learn how to enter inventory items and kits
- Understand how to enter transactions for inventory items
- Learn how to use the tools available for counting and updating physical inventory
- Understand how to print the necessary inventory reports and update I/M and the General Ledger
- Know how to use I/M reports and inquiry options to evaluate your inventory
- Understand steps for closing a period in I/M



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
	Total Time	390 min or 6 1/2 hours

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.



CONTENTS

- Welcome
 - Integration
 - The Company
- Setting Up Purchase Order
 - Purchase Order Options
 - General Ledger Account Maintenance
 - Ship to Addresses
 - Defining Standard Miscellaneous Charges
 - Price Structures for Vendors
 - Landed Costs
- Purchase Orders
 - Automatically Generated Purchase Orders
 - Reports for Determining What to Order
 - Entering Purchase Orders
 - Drop Ship Orders
 - Repeating Orders
 - Master Orders
 - Printing Purchase Orders
 - Tracking Purchase Orders
- Receiving Purchase Order Goods
 - Flowchart
 - Receipt of Goods
 - Recording Invoices after Receiving Goods
 - Printing Registers and Updating Receipts
 - Returning Goods
 - Material Requisition
- Reports & Inquiry Options
 - On-Line Inquiries
 - Purchase Order Reports
 - Purchases Clearing Reports
- Period End Processing

Syllabus

Section	Subject	Time Estimated
1	Welcome and Introduction	20 min
2	Setting Up P/O	60 min
3	Entering Purchase Orders	90 min
4	Lab	20 min
5	Receiving and Invoicing P.O.s	60 min
6	Additional Options	60 min
7	Reporting in P/O	30 min
8	Period End Processing	20 min
9	Review	10 min
10	Lab	20 min
	Total Time	390 min or 6 1/2 hours

Purchase Order Objectives:

- Understand the capabilities of Purchase Order.
- Learn the steps for setting up the module and how it integrates with the other modules.
- Learn how to create purchase orders including master and repeating orders, as well as how to indicate goods are to be drop shipped to a customer.
- Learn how to generate a purchase order based on sales orders entered in Sales Order.
- Learn how to receive items as well as process invoices against a purchase order.
- Learn how to use the reports and inquiry options, as well as how to close the period in Purchase Order.