

How To Setup and Install Sales Processing

NOTE: Times are estimated and could vary up or down based on complexity.

AR Setup Steps	Description	Help Manual	Tutorial Video	Templates / Docs	Customer Est. Time	Consulting Est. Time
Set Up Terms						
Set Up Service Charges						
Set Up Salesperson						
Set Up Taxes						
1) Set Up Customers	In order to use Sales Processing, customers need to be entered and set up in the system.	Customer Entity	...	...	1 hr for Import 2-40+ Hours for Setup	As needed
2) Set Up Items	Sales activity is focused around item. Items determine the gl accounts, inventory impact, pricing, etc. when invoicing	TBD	...	...	1 hr for Import 2-40+ Hours for Setup	As needed
3) Set Up Pricing	Pricing is set up primarily in Item Setup. If Special Pricing is active, set up can take place in the Customer Pricing Tab as well.	TBD	...	...	1-8+ hrs	As needed
4) Set Up Taxing	Taxing is set up primarily in the common info section. Once taxing is setup, taxes are established for each item, and special taxing /exemption circumstances can be assigned to specific customers.	TBD	...	...	2-40+ hrs	As needed
5) Import Beginning So /Invoice Activity or Create Manual Entries	If requested, current open AR/SO activity should either be imported or manually entered into the system.	How to Import Invoices from Origin	...	...	1-40+ hrs	As needed
6) Training on AR/SO /Payments	Training on the actual transnational activities	...	...	...	1-4+ hrs	As needed
7) Reporting	Setup and training of AR Reporting	...	...	...	1-4+ hrs	As needed