

Sales Order Processing in Microsoft Dynamics GP 10.0

Course 8824: One day; Instructor-Led

Introduction

In this one information-packed day, the Microsoft Dynamics GP Sales Order Processing class explores the accounting cycle and the processes required to enter and ship sales orders. This course shows you how to easily manage the life-cycle of your customer's order from the initial quote to the shipment documentation and final invoicing. You learn how to perform additional functions setting up process holds for quality assurance and linking order documents to purchase orders.

A thorough understanding of these topics allows you to boost sales order processing productivity and help improve customer service by automating sales order workflow procedures. Microsoft Dynamics GP Sales Order Processing gives you precise control over the flow of sales documents by defined quality insurance steps throughout the sales transaction life cycle. Unique ship to addresses per line item allows you to enter multiple items on a single document and ship to multiple locations.

This course shows you how to eliminate unnecessary steps in the order process, set up required steps according to your own business needs, and how to automate routine steps. You learn how to manually change quantity, units of measure, and prices to existing sales documents. You see what you can do when orders exceed quantity on hand.

Audience

Sales Order Processing is recommended for anyone who plans to implement, use, maintain, consult, or support Microsoft Dynamics GP. The class is targeted toward administrators, office managers, CEOs, and consultants who need to understand the technical aspects of Sales Order Processing and gain foundational knowledge of the application functionality.

At Course Completion

After completing this course, students should be able to:

- Create Quotes, Sales Orders, Back Orders, Invoices, and Returns
- Allocate and fulfill item quantities automatically and manually
- Execute comprehensive reports and use inquiry screens to obtain information which you can use to analyze and improve business processes
- Understand how the Sales Order Processing module

interacts with the Microsoft Inventory Control and Purchase Order Processing

- Define set up options for the module that allow you to customize your system to better fit your organization's unique needs
- Link sales orders to purchase orders

Prerequisites

Before attending this course, students must have:

- General knowledge of Microsoft Windows
- Knowledge of basic navigation functions in Microsoft Dynamics GP

Course Materials

The student kit includes a comprehensive workbook and other necessary materials for this class.

Course Outline

Chapter 1: Overview and Setup

This Chapter briefly discusses the purpose and primary features of the Sales Order Processing module. This chapter also helps you understand the defaults and user options defined in the Sales Order Processing Setup window. You review the variety of pricing structures available in Sales Order Management. You discuss the importance of the Order document Types and how they affect automated work flow in the life-cycle of an order. You learn how the behavior of each document type determines the steps and processes that must take place in the sales order processing cycle. You also learn how to set up process holds allowing you better control over document flow.

Main Topics

- Primary features of Sales Order Processing
- Sales Order Processing Setup
- Master Documents
- Sales Quote Setup
- Sales Order Setup
- Sales Back Order Setup
- Sales Invoice Setup
- Sales Return Setup
- Sales Process Holds Setup
- Prospect Setup
- User Specific Setup

Chapter 2: Entering Quotes, Orders, Back Orders, and Returns

This chapter examines the day to day operations in the Sale Order Processing module. You focus on the Sales Transaction Entry window, which is the central location for entering customer orders. You learn the minimum required information to enter an order and the other important fields and options available for tracking, managing and handling orders. You learn about

entering quotes, orders, back orders, invoices, and returns.

Main Topics

- Sales Batch Entry
- Sales Commission Entry
- Quotes
- Orders
- Invoices
- Back Orders
- Returns

Chapter 3: Using Special Item Types

This chapter examines the unique characteristics of “special type” items in Sales Order Processing. This includes entering Drop Ship orders, Lot Numbered items, and Sales Kits.

Main Topics

- Drop Ship Items
- Serial/Lot Numbered Items
- Sales Kit Options

Chapter 4: Printing, Posting, and Transferring

This chapter examines the day to day printing and posting operations in the Sale Order Processing module. The various printing and posting options for individual and multiple documents are discussed. This chapter will also focus on what documents can be transferred (to other document types) and how the document information is affected.

Main Topics

- Printing Documents
- Posting Documents
- Sales Transfers

Chapter 5: Fulfilling, Allocating, and Committing Documents

This chapter discusses the terms “allocation” and “fulfillment” and determines how these processes can be tailored for a business. A process called Sales Order Commitments that allows linking sales order documents to purchase orders in the Purchase Order Processing module will be explained.

Main Topics

- Allocating Quantities
- Sales Order Fulfillment
- Creating Purchase Order Commitments

Chapter 6: Editing and Removing Records

This chapter discusses the options available for editing, deleting, and voiding sales order documents existing in the system. You review the inquiry screens and reports that are provided to assist you in making informed sales decisions and to track sales data.

Main Topics

- Deleting Documents
- Voiding Documents
- Removing History
- Reconciling

Appendix A: Job Aids

This appendix is used to enhance the core information provided in each chapter. These job aids are optional and are designed to give an additional way to improve efficiency while using the Sales Order Processing features. This appendix contains short answer and True or False questions that may be used as a review of the information covered in this course and may be used as time permits. Answers to all questions are provided at the end of the section.

Main Topics

- Posting Flow
- Integration
- Reports
- Test Your Knowledge (Quizzes)

Appendix B: Case Study

This case study is a comprehensive lab that can be used to reinforce the learning that has occurred throughout the Sales Order Processing class.

Main Topics

- Sales Order Processing Setup
- Sales Order Processing Document Entry
- Printing Sales Order Processing Documents