

COURSE OUTLINE



Sage 300 Order Entry

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A. Course Outlines

1. Free online pre-training assessments

Not sure how familiar you are with the software – then click on the link below and/or forward the link to your colleague(s) in order to distinguish what you know.

- Sage 300 Order Entry Pre-Training Assessment <[Click Here](#)>

2. Sage 300 Order Entry

Course description

Sage 300 Order Entry allows you to enter orders and sales returns and print invoices, credit notes, order confirmations, picking slips and shipping labels.

Course duration

This course is scheduled for one day from 9:00 till 16:00.

Course pre-requisites

Students should possess basic knowledge in bookkeeping or accounting theory, basic bookkeeping or accounting theory, and basic knowledge of Windows.

Documentation

The following documentation is included with the course

- Sage 300 user guide
- User competency assessment
- Certificate of attendance

After attending you will be able to

- Understanding how to do quotes, shipments, invoicing, credit and debit notes
- Create sales orders from quotations
- Run day end in inventory control to update accounts receivable
- Learn how to automatically post transactions through Accounts Receivable to General Ledger
- Understanding all the reports, to control outstanding orders

Who should attend?

- Bookkeepers
- Accountants
- Auditors
- Internal Auditors
- Everybody else that will need to make sense out of any financial reports, or that needs to do budgets, variance reports or maintain any general ledger accounts, the setup of it, as well as maintenance of those accounts.

Topics covered

Introduction to Order Entry

Before using Order Entry

- Overview of OE processing
- Transaction processing



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- Processing orders and quotes
- Processing shipments
- Processing invoices
- Processing credit notes and debit notes
- Day end processing
- Batches created in accounts receivable
- Journal entries generated by posted transactions
- Reporting order entry data
- Clearing historical data
- Using Order Entry with other Sage 300 programs

Maintaining setup information

- Icons used for maintaining setup information
- Changing Order Entry options
- Changing GL integration options
- Adding, editing and deleting miscellaneous charges
- Adding, editing and deleting ship-via codes
- Adding, and editing salesperson commission rates
- Adding, and editing e-mail messages
- Adding, editing and deleting optional fields
- Importing and exporting setup records

Processing orders, shipments, and invoices

- Icons used to process orders, shipments, and invoices
- Using the order entry form
- Using the shipment entry form
- Using the invoice entry form
- Printing journals
- Printing quotes
- Printing order confirmations
- Printing picking slips
- Printing shipping labels
- Printing invoices
- Importing and exporting order information
- Using the sales statistics, salesperson inquiry, and sales history

Processing credit notes and debit notes

- Icons used to process credit notes and debit notes
- Using the credit /debit notes entry form
- Printing credit/debit note entry form
- Printing credit/debit note posting journals
- Printing credit notes and debit notes
- Importing credit note and debit note information

Periodic processing

- Day end processing
- Creating general ledger batches and posting AR batches in AR
- Printing periodic reports
- Clearing history



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Reports

- Standard reports
- Printing reports
- Aged orders
- Credit notes and debit notes
- E-mail messages
- GL integration
- GL transactions
- Invoices
- Miscellaneous charges
- Options
- Optional fields
- Order action
- Order confirmations
- Picking slips
- Posting journals
- Quotes
- Sales history
- Sales statistics
- Salesperson commissions
- Salesperson commission rates
- Ship-via codes
- Shipping labels
- Templates
- Transaction list

Error messages

- Using online message help

Importing and exporting

- OE import and export data

Order entry security

- Permissions and rights

Technical information

- Creating macros for order entry
- Multi-user considerations
- Updating customized picking slips forms



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B. Contact Details

1. Location for training

We have training facilities in Centurion or training can be done on-site on request.

Physical Address:

Centurion
1001 Clifton Avenue
Lyttelton Manor
Centurion

2. For bookings or more information

For bookings or more information please feel free to Marili van Niekerk us at 012 640 2626 or e-mail training@acctech.biz

For the latest event schedule visit our training page on www.acctech.biz



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