



# Quick Start: Selling & Purchasing Items And Services

## Summary

Most businesses will produce and/or sell items and services as well as purchase them. This will show you the basic steps on how to sell/purchase those, delivery/receive them, and invoice those items and services.

## Step-by-step guide

1. Order Form:
  - i. A Sales Order is under Sales - A/R-> Sales Order menu
  - ii. A Purchase Order is under the Purchasing - A/P - Purchase Order menu
2. In the following window, the required information is the vendor/customer name, dates, and item/service
  - i. If you want to use an item, enter in the Item No., quantity and cost
  - ii. If you want to use a service item, switch Item/Service Type to Service, then fill out the Description, G/L Account and cost

The image displays two side-by-side screenshots of software windows for creating a Sales Order and a Purchase Order. Both windows have a header section with fields for Customer/Vendor, Name, Contact Person, and dates. Below is a table for items with columns for Item No., Item Description, Quantity, In Stock, and UoM. A blue arrow points to the 'Item Description' column in both windows with the text 'Service or Item Type'. At the bottom, there are fields for Sales Employee/Owner, Total Before Discount, Discount, Freight, Tax, and Total. The 'Purchase Order' window also has a 'Buyer' field and a 'Total Payment Due' field. Both windows have 'OK', 'Cancel', and 'Finalize' buttons, and a 'Copy From'/'Copy To' dropdown menu at the bottom right.

3. Click Add when finished
4. When you receive or deliver the item, you can use the Copy To button on the original document to transfer the data to a Good Receipts PO or Delivery document (You can



bring up the original document by going back into the respective order form and finding the document via the No. in Find Mode, which can be activated with CTRL + ALT + F)

5. Verify the quantity, item and cost and click Add

#	Item No.	Item Description	Quantity	U...
1	RM1	OBeer Malt	1	lbs

#	Type	Item No.	Item Description	Quantity	UoM Name
1		RM1	OBeer Malt	1	lbs

6. Lastly, to create an invoice, you can again use the Copy To button to transfer it to either an A/R or A/P invoice

**Note:**

If something is incorrect with the Delivery of Goods Receipt PO, you can copy the document to a Return or Goods Return, respectively, instead.