

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

Sales Order					_ D >	Purc	nase Order						
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- 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

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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.