

Purchase Management End Users for SunSystems v5.4 & v6

Duration: ½ Day – scheduled on demand

Prerequisite: No prior knowledge is assumed. An understanding of purchasing procedures is desirable.

Who Should Attend: Any users who are responsible for raising purchase orders, receipt notes and invoices for an organisation.

What You Will Learn: At the completion of this training session participants will be competent in the following:

- Navigate around SunSystems
- Understand the purchasing process flow
- Create and maintain suppliers
- Create and maintain item codes
- Raise a Purchase Order
- Generate Receipt Notes
- Generate an Match Invoices
- Run standard reports and perform inquiries

Please see over page for course content

Course Content – Purchase Management - End Users for SunSystems v5.4 & v6

Introduction & Overview

- Working with the SunSystems user interface
- Overview of SunSystems Order Fulfilment
- The Purchase Order Processing Cycle
- The Purchasing cycle stages

Maintaining Items & Suppliers

- Creating new suppliers in SunSystems
- Creating new items for use in Purchase Management

Processing Purchase Orders

- Raising general purchase orders
- Raising an asset purchase order
- Purchase order confirmation
- Raising a receipt note
- Receipt note transfers
- Purchase invoice entry

- Generating invoices from purchaser orders
- Matching an invoice to order
- Un-matching an invoice
- Adding lines to an invoice
- Amending invoices
- Entering an invoice for multiple orders
- Generating multiple invoices for a single order
- Entering a credit note
- Purchase invoice matching
- Using Recover failed postings

Reports & Inquiries

- The Purchase Order Listing Report
- The Purchase Invoice Listing Report
- The Purchase Invoice Register Report
- Performing a Purchase Inquiry