Sales Order

Strong customer service through on-time and accurate delivery…

This module examines the processes available for quoting, selling and shipping stock within Accounts Receivable. The aim of this course is for students to learn how to record sales quickly and easily and then to get the right stock out to the right customers in a timely manner.

Duration: Up to 1 Day but will vary according to client requirements
Cost: $1575 + GST + Travel per day
Additional Manuals +$50 per attendee

Who Should Attend:
- Anyone involved with the Accounts Receivable – Sales Order or Inventory modules.

Pre-Requisites:
- Windows knowledge
-Introduction to Dynamics AX
-Basic understanding of trade & logistics and inventory management concepts.

- Examine key sales order concepts.

- Review the process of setting up new customers.

- Look at how sales order parameters can be used to tailor the system to individual business needs.

- Raise a quote, track its success and convert to a sales order.

- Create a sales order and confirm, pick and invoice it. Discover how to use direct delivery functionality to purchase a special order item and have it delivered direct to the customer.

- Use miscellaneous charges to add fees or charges to customer invoices.

- Learn multiple methods of handling customer returns and how to process the arrival of these items.

- Discover how blanket and subscription orders can be used to handle customer supply contracts or repeat purchases of the same items.

- Review the use of reservations to ensure the right customers are provided with stock when supplies are limited.

- Setup trade agreements to control and customer pricing.

- Use the summary update function to post multiple sales orders as one invoice.

Professional Advantage training is costed in either half or full day sessions. Half day (approx 4 hrs) and full day (approx 7.5 hrs) training sessions may vary in length depending on competencies required by the customer. Room hire available upon request.

For additional information regarding this course, please email mstraining@pa.com.au