ADILAS TRAINING COURSES – EXPLORING BUSINESS FUNCTIONS

CLASS 4 – POS, SALES & INVOICING

WELCOME:

* REVIEW INVENTORY:
  + Any follow up questions
  + Things we want to cover
  + Examples ???
* INVOICE SETUP:
  + Corp-wide Settings
    - Many options for invoice flow, verbage, & look/feel
* SELLING GOODS/SERVICES:
  + The Adilas Shopping Cart
    - Map – connections (inventory, customers, invoices, quotes)
    - Session – virtual memory
    - 1 cart open at a time
    - Build, add, take away, adjust, update – nothing is permanent until you CHECKOUT & create a new INVOICE
    - Help file for View Cart Page
    - Leave & navigate back at any time – links at the top
* INVOICE TYPES & SHOPPING CART NAVIGATION POINTERS:
  + 2 Main Invoice Used:
    - Customer Invoice
    - Counter Sale
  + Cart Navigation:
    - Look to your buttons!
    - More options
* GETTING INTO A SHOPPING CART:
  + From Homepages
  + From Quick Search:
    - Customer
    - Part
    - Invoice – new
* INVOICING EXAMPLES – GETTING PRODUCT INTO THE CART:
  + Cart quick search
  + Barcoded item
  + Add item
    - Bulk add
  + My cart favorites
* QUOTES:
  + All the same features of the cart!
  + Save as a Quote
    - Does not affect inventory or financials
    - Quoting/Invoicing tool to work with before finalizing with an Invoice
* ASSIGNMENTS:
  + Invoice, Invoice, Invoice!
  + Practice, Practice, Practice!
  + Use any of the examples we showed today and play around with the Shopping Cart – become familiar with it!