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!