

## Sage: All About Stock - 2 days



### Course Objectives

Understand about managing stock, processing sales and purchase orders using Sage 50 Accounts. Learn how to handle foreign currency transactions.

### Prerequisites

Currently using or have used the core modules within Sage 50 Accounts or other computerised accounting software.

### Exercises

This course is instructor led, involving the utilisation of examples and exercises in a workshop environment.

### Stock

- Understand product codes and categories
- Set up new and amend existing product records
- How to create and update product price lists and discounts
- Enter opening stock figures
- Deal with damaged stock and returns
- Understand the product activity section
- Understand the term "free stock"
- Allocation
- Stock take and make adjustments
- The stock period end and year end processes

### Bill of Materials

- How to set up an assembly
- Deal with sub-assemblies
- How to check component availability and to create a purchase order for the products you are short of

### Purchase Order Processing

- Create and process purchase orders
- Create skeleton orders
- Record goods received
- Look at reports

### Sales Order Processing

- Create and process sales orders
- How to put on hold and amend sales orders
- Create skeleton orders
- Add payment details to a sales order
- Create multiple delivery addresses
- Check for shortfalls
- How to ship goods
- Look at reports

### Product and Service Invoices and Credits

- How to use quotes and see what was won, lost and expired
- Create proformas, product and service invoices and credit notes
- How to use recurring, skeleton and duplicate invoices
- A quick way to raise a credit note against a specific invoice
- Printing invoices and credit notes
- Simple changes to invoice layout

### Foreign Currency

- How to set up the Foreign Trader
- Rate changes
- Re-valuation