

Ranges:	From:	To:
Task ID	First	Last
Category	Sales	Sales

Task ID:

ADMIN\_SALES\_001\*

Category:

Sales

Task Name:

Set up Receivables Management

Description:

Set up receivables and refund checks.

User ID

Name

plasiter

plasiter

Company

Explorer Pipeline Company

plasiter2

Pamela Lasiter

Company

Explorer Pipeline Company

Rhonda

Rhonda Runde

Company

Explorer Pipeline Company

Task ID:

ADMIN\_SALES\_002\*

Category:

Sales

Task Name:

Set up customer classes

Description:

User ID

Name

plasiter

plasiter

Company

Explorer Pipeline Company

plasiter2

Pamela Lasiter

Company

Explorer Pipeline Company

Rhonda

Rhonda Runde

Company

Explorer Pipeline Company

Task ID:

ADMIN\_SALES\_003\*

Category:

Sales

Task Name:

Set up Sales Order Processing

Description:

Set up sales order processing, process holds, sales workflow, advanced picking and extended pricing.

User ID

Name

plasiter

plasiter

Company

Explorer Pipeline Company

plasiter2

Pamela Lasiter

Company

Explorer Pipeline Company

Rhonda

Rhonda Runde

Company

Explorer Pipeline Company

Task ID:

ADMIN\_SALES\_004\*

Category:

Sales

Task Name:

Set up Invoicing

Description:

User ID

Name

plasiter

plasiter

Company

Explorer Pipeline Company

plasiter2

Pamela Lasiter

Company

Explorer Pipeline Company

Rhonda

Rhonda Runde

Company

Explorer Pipeline Company

Task ID: ADMIN\_SALES\_005\*

Task Name: Reconcile Receivables amounts

Description:

Category: Sales

User ID	Name
plasiter	plasiter
Company	
Explorer Pipeline Company	
plasiter2	Pamela Lasiter
Company	
Explorer Pipeline Company	
Rhonda	Rhonda Runde
Company	
Explorer Pipeline Company	

Task ID: ADMIN\_SALES\_008\*

Task Name: Post scheduled customer payments

Description:

Category: Sales

User ID	Name
plasiter	plasiter
Company	
Explorer Pipeline Company	
plasiter2	Pamela Lasiter
Company	
Explorer Pipeline Company	
Rhonda	Rhonda Runde
Company	
Explorer Pipeline Company	

Task ID: ADMIN\_SALES\_009\*

Task Name: Age customer balances

Description:

Category: Sales

User ID	Name
plasiter	plasiter
Company	
Explorer Pipeline Company	
plasiter2	Pamela Lasiter
Company	
Explorer Pipeline Company	
Rhonda	Rhonda Runde
Company	
Explorer Pipeline Company	

Task ID: ADMIN\_SALES\_010\*

Task Name: Assess finance charges

Description:

Category: Sales

User ID	Name
plasiter	plasiter
Company	
Explorer Pipeline Company	
plasiter2	Pamela Lasiter
Company	
Explorer Pipeline Company	
Rhonda	Rhonda Runde
Company	
Explorer Pipeline Company	

Task ID: ADMIN\_SALES\_011\*

Task Name: Print customer statements

Description:

Category: Sales

User ID	Name
plasiter	plasiter
Company	
Explorer Pipeline Company	
plasiter2	Pamela Lasiter
Company	
Explorer Pipeline Company	
Rhonda	Rhonda Runde
Company	
Explorer Pipeline Company	

Task ID: ADMIN\_SALES\_013\*

Task Name: Write off sales documents

Description:

Category: Sales

User ID	Name
plasiter	plasiter
Company	
Explorer Pipeline Company	
plasiter2	Pamela Lasiter
Company	
Explorer Pipeline Company	
Rhonda	Rhonda Runde
Company	
Explorer Pipeline Company	

Task ID: ADMIN\_SALES\_014\*

Task Name: Paid transaction removal

Description:

Category: Sales

User ID	Name
plasiter	plasiter
Company	
Explorer Pipeline Company	
plasiter2	Pamela Lasiter
Company	
Explorer Pipeline Company	
Rhonda	Rhonda Runde
Company	
Explorer Pipeline Company	

Task ID: ADMIN\_SALES\_015\*

Task Name: Period-end sales routines

Description: Create checklists and perform year end close.

Category: Sales

User ID	Name
Marty	Marty Johnson
Company	
Explorer Pipeline Company	
plasiter	plasiter
Company	
Explorer Pipeline Company	
plasiter2	Pamela Lasiter
Company	
Explorer Pipeline Company	
Rhonda	Rhonda Runde
Company	
Explorer Pipeline Company	

terry

Terry Biehl

Company
Explorer Pipeline Company

Task ID: ADMIN\_SALES\_016\*

Task Name: Sales tables

Description: Access to the tables is only necessary to report data from within Report Writer.

Category: Sales

User ID	Name
plasiter	plasiter
Company	Explorer Pipeline Company
plasiter2	Pamela Lasiter
Company	Explorer Pipeline Company
Rhonda	Rhonda Runde
Company	Explorer Pipeline Company

Task ID: ARINVOICES

Task Name: Accounts Recievable Invoices from Invoice Applicat

Description:

Category: Sales

User ID	Name
debbie	Debbie Gomez
Company	Explorer Pipeline Company
Marty	Marty Johnson
Company	Explorer Pipeline Company
patricia	Patricia Baca
Company	Explorer Pipeline Company
plasiter	plasiter
Company	Explorer Pipeline Company
plasiter2	Pamela Lasiter
Company	Explorer Pipeline Company
Rhonda	Rhonda Runde
Company	Explorer Pipeline Company
tbaca	Tricia Baca
Company	Explorer Pipeline Company
terry	Terry Biehl
Company	Explorer Pipeline Company

Task ID: CARD\_0201\*

Task Name: Maintain customers and addresses

Description: Also includes the Customer list, preview and customization.

Category: Sales

User ID	Name
Marty	Marty Johnson
Company	Explorer Pipeline Company
patricia	Patricia Baca
Company	Explorer Pipeline Company
plasiter	plasiter
Company	Explorer Pipeline Company

plasiter2

Pamela Lasiter

Company

Explorer Pipeline Company

Rhonda

Rhonda Runde

Company

Explorer Pipeline Company

tbaca

Tricia Baca

Company

Explorer Pipeline Company

Task ID: CARD\_0202\*

Task Name: Maintain customer financial summary

Description:

Category: Sales

User ID	Name
Marty	Marty Johnson
Company	
Explorer Pipeline Company	
patricia	Patricia Baca
Company	
Explorer Pipeline Company	
plasiter	plasiter
Company	
Explorer Pipeline Company	
plasiter2	Pamela Lasiter
Company	
Explorer Pipeline Company	
Rhonda	Rhonda Runde
Company	
Explorer Pipeline Company	
tbaca	Tricia Baca
Company	
Explorer Pipeline Company	

Task ID: CARD\_0203\*

Task Name: Maintain customer/vendor relationships

Description:

Category: Sales

User ID	Name
Marty	Marty Johnson
Company	
Explorer Pipeline Company	
patricia	Patricia Baca
Company	
Explorer Pipeline Company	
plasiter	plasiter
Company	
Explorer Pipeline Company	
plasiter2	Pamela Lasiter
Company	
Explorer Pipeline Company	
Rhonda	Rhonda Runde
Company	
Explorer Pipeline Company	
tbaca	Tricia Baca
Company	
Explorer Pipeline Company	

Task ID: CARD\_0204\*

Task Name: Maintain customer items

Description:

Category: Sales

User ID	Name
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Marty

Marty Johnson

Company

Explorer Pipeline Company

patricia

Patricia Baca

Company

Explorer Pipeline Company

tbaca

Tricia Baca

Company

Explorer Pipeline Company

Task ID: CARD\_0206\*

Task Name: Maintain national accounts

Description:

Category: Sales

User ID	Name
plasiter	plasiter
Company	
Explorer Pipeline Company	
plasiter2	Pamela Lasiter
Company	
Explorer Pipeline Company	
Rhonda	Rhonda Runde
Company	
Explorer Pipeline Company	

Task ID: INQ\_SALES\_001\*

Task Name: View customers

Description: Also includes the Customer list and preview.

Category: Sales

User ID	Name
Jean	Jean McAuley
Company	
Explorer Pipeline Company	
lgraves	Leslie Graves
Company	
Explorer Pipeline Company	
plasiter	plasiter
Company	
Explorer Pipeline Company	
plasiter2	Pamela Lasiter
Company	
Explorer Pipeline Company	
Rhonda	Rhonda Runde
Company	
Explorer Pipeline Company	
Richard	Richard Ruszenas
Company	
Explorer Pipeline Company	
tschatz	Tara Schatz
Company	
Explorer Pipeline Company	

Task ID: INQ\_SALES\_002\*

Task Name: View customer financial information

Description: View customer period summary, yearly summary, payment summary, and customer summary.

Category: Sales

User ID	Name
Jean	Jean McAuley
Company	
Explorer Pipeline Company	
lgraves	Leslie Graves
Company	
Explorer Pipeline Company	

plasiter	plasiter
Company	
Explorer Pipeline Company	
plasiter2	Pamela Lasiter
Company	
Explorer Pipeline Company	
Rhonda	Rhonda Runde
Company	
Explorer Pipeline Company	
Richard	Richard Ruszenas
Company	
Explorer Pipeline Company	
tschatz	Tara Schatz
Company	
Explorer Pipeline Company	

Task ID:

INQ\_SALES\_003\*

Category:

Sales

Task Name:

View receivables financial information

Description:

User ID	Name
Jean	Jean McAuley
Company	
Explorer Pipeline Company	
lgraves	Leslie Graves
Company	
Explorer Pipeline Company	
plasiter	plasiter
Company	
Explorer Pipeline Company	
plasiter2	Pamela Lasiter
Company	
Explorer Pipeline Company	
Rhonda	Rhonda Runde
Company	
Explorer Pipeline Company	
Richard	Richard Ruszenas
Company	
Explorer Pipeline Company	
tschatz	Tara Schatz
Company	
Explorer Pipeline Company	

Task ID:

INQ\_SALES\_004\*

Category:

Sales

Task Name:

View receivables transactions

Description: View receivables transactions by customer and by document. Also includes the Receivables Transactions list and preview.

User ID	Name
GLORIA	Gloria Vaughn
Company	
Explorer Pipeline Company	
Jean	Jean McAuley
Company	
Explorer Pipeline Company	
lgraves	Leslie Graves
Company	
Explorer Pipeline Company	
molly	Molly Mandeville(contracto
Company	
Explorer Pipeline Company	
plasiter	plasiter
Company	

Explorer Pipeline Company

plasiter2 Pamela Lasiter

Company

Explorer Pipeline Company

Rhonda Rhonda Runde

Company

Explorer Pipeline Company

Richard Richard Ruszenas

Company

Explorer Pipeline Company

tschatz Tara Schatz

Company

Explorer Pipeline Company

Task ID: INQ\_SALES\_009\*

Task Name: View national accounts

Description:

Category: Sales

User ID Name

plasiter plasiter

Company

Explorer Pipeline Company

plasiter2 Pamela Lasiter

Company

Explorer Pipeline Company

Rhonda Rhonda Runde

Company

Explorer Pipeline Company

Task ID: INQ\_SALES\_010\*

Task Name: View lockbox information

Description:

Category: Sales

User ID Name

Jean Jean McAuley

Company

Explorer Pipeline Company

lgraves Leslie Graves

Company

Explorer Pipeline Company

plasiter plasiter

Company

Explorer Pipeline Company

plasiter2 Pamela Lasiter

Company

Explorer Pipeline Company

Rhonda Rhonda Runde

Company

Explorer Pipeline Company

Richard Richard Ruszenas

Company

Explorer Pipeline Company

Task ID: INQ\_SALES\_011\*

Task Name: View salespersons and commissions

Description: Also includes the Salespeople list and preview.

Category: Sales

User ID Name

plasiter plasiter

Company



Explorer Pipeline Company

plasiter2 Pamela Lasiter

Company

Explorer Pipeline Company

Rhonda Rhonda Runde

Company

Explorer Pipeline Company

Task ID: LIST\_SALES\_001\*

Task Name: All Sales Transactions list

Description:

Category: Sales

User ID	Name
Jean	Jean McAuley
Company	
Explorer Pipeline Company	
Igraves	Leslie Graves
Company	
Explorer Pipeline Company	
plasiter	plasiter
Company	
Explorer Pipeline Company	
plasiter2	Pamela Lasiter
Company	
Explorer Pipeline Company	
Rhonda	Rhonda Runde
Company	
Explorer Pipeline Company	
Richard	Richard Ruszenas
Company	
Explorer Pipeline Company	
tschatz	Tara Schatz
Company	
Explorer Pipeline Company	

Task ID: RPT\_SALES\_001\*

Task Name: Sales reports

Description: Trial-Balance, history, analysis, and activity reports

Category: Sales

User ID	Name
debbie	Debbie Gomez
Company	
Explorer Pipeline Company	
plasiter	plasiter
Company	
Explorer Pipeline Company	
plasiter2	Pamela Lasiter
Company	
Explorer Pipeline Company	
Rhonda	Rhonda Runde
Company	
Explorer Pipeline Company	
terry	Terry Biehl
Company	
Explorer Pipeline Company	

Task ID: RPT\_SALES\_002\*

Task Name: Commission reports

Description:

Category: Sales

User ID	Name
debbie	Debbie Gomez
Company	

Explorer Pipeline Company  
Rhonda Rhonda Runde

Company

Explorer Pipeline Company  
terry Terry Biehl

Company

Explorer Pipeline Company

Task ID: RPT\_SALES\_003\* Category: Sales  
Task Name: Sales setup reports  
Description:

User ID Name  
debbie Debbie Gomez

Company

Explorer Pipeline Company  
plasiter plasiter

Company

Explorer Pipeline Company  
plasiter2 Pamela Lasiter

Company

Explorer Pipeline Company  
Rhonda Rhonda Runde

Company

Explorer Pipeline Company  
terry Terry Biehl

Company

Explorer Pipeline Company

Task ID: RPT\_SALES\_004\* Category: Sales  
Task Name: Posting journals  
Description:

User ID Name  
debbie Debbie Gomez

Company

Explorer Pipeline Company  
Jean Jean McAuley

Company

Explorer Pipeline Company  
lgraves Leslie Graves

Company

Explorer Pipeline Company  
Marty Marty Johnson

Company

Explorer Pipeline Company  
patricia Patricia Baca

Company

Explorer Pipeline Company  
plasiter plasiter

Company

Explorer Pipeline Company  
plasiter2 Pamela Lasiter

Company

Explorer Pipeline Company  
Rhonda Rhonda Runde

Company

Explorer Pipeline Company  
Richard Richard Ruszenas

Company

Explorer Pipeline Company

tbaca

Tricia Baca

Company

Explorer Pipeline Company

terry

Terry Biehl

Company

Explorer Pipeline Company

tschatz

Tara Schatz

Company

Explorer Pipeline Company

Task ID: RPT\_SALES\_005\*

Task Name: Customer letters

Description: Used in the Letter Writing Assistant

Category: Sales

User ID Name

debbie Debbie Gomez

Company

Explorer Pipeline Company

plasiter

plasiter

Company

Explorer Pipeline Company

plasiter2

Pamela Lasiter

Company

Explorer Pipeline Company

Rhonda

Rhonda Runde

Company

Explorer Pipeline Company

terry

Terry Biehl

Company

Explorer Pipeline Company

Task ID: RPT\_SALES\_006\*

Task Name: Collection letters

Description: Used in the Letter Writing Assistant

Category: Sales

User ID Name

debbie Debbie Gomez

Company

Explorer Pipeline Company

plasiter

plasiter

Company

Explorer Pipeline Company

plasiter2

Pamela Lasiter

Company

Explorer Pipeline Company

Rhonda

Rhonda Runde

Company

Explorer Pipeline Company

terry

Terry Biehl

Company

Explorer Pipeline Company

Task ID: TRX\_SALES\_003\*

Task Name: Print sales documents

Description:

Category: Sales

User ID Name

Jean Jean McAuley

Company

Explorer Pipeline Company

lgraves

Leslie Graves

Company

Explorer Pipeline Company

Richard

Richard Ruszenas

Company

Explorer Pipeline Company

tschatz

Tara Schatz

Company

Explorer Pipeline Company

Task ID: TRX\_SALES\_007\*

Task Name: Enter customer/vendor transactions

Description: Does not include posting.

Category: Sales

User ID Name

plasiter plasiter

Company

Explorer Pipeline Company

plasiter2

Pamela Lasiter

Company

Explorer Pipeline Company

Rhonda

Rhonda Runde

Company

Explorer Pipeline Company

Task ID: TRX\_SALES\_013\*

Task Name: Enter Receivables transaction

Description: Does not include posting. Also includes the Receivables Transactions list, preview and customization.

Category: Sales

User ID Name

plasiter plasiter

Company

Explorer Pipeline Company

plasiter2

Pamela Lasiter

Company

Explorer Pipeline Company

Rhonda

Rhonda Runde

Company

Explorer Pipeline Company

Task ID: TRX\_SALES\_014\*

Task Name: Enter customer scheduled payments

Description: Does not include posting.

Category: Sales

User ID Name

plasiter plasiter

Company

Explorer Pipeline Company

plasiter2

Pamela Lasiter

Company

Explorer Pipeline Company

Rhonda

Rhonda Runde

Company

Explorer Pipeline Company

Task ID: TRX\_SALES\_015\*

Task Name: Enter customer cash receipts

Description: Does not include posting.

Category: Sales

User ID Name

Jean Jean McAuley

Company

Explorer Pipeline Company

lgraves

Leslie Graves

Company

Explorer Pipeline Company

plasiter	plasiter
Company	
Explorer Pipeline Company	
plasiter2	Pamela Lasiter
Company	
Explorer Pipeline Company	
Rhonda	Rhonda Runde
Company	
Explorer Pipeline Company	
Richard	Richard Ruszenas
Company	
Explorer Pipeline Company	
tschatz	Tara Schatz
Company	
Explorer Pipeline Company	

Task ID: TRX\_SALES\_016\*

Task Name: Apply sales documents

Description:

Category: Sales

User ID	Name
Jean	Jean McAuley
Company	
Explorer Pipeline Company	
lgraves	Leslie Graves
Company	
Explorer Pipeline Company	
plasiter	plasiter
Company	
Explorer Pipeline Company	
plasiter2	Pamela Lasiter
Company	
Explorer Pipeline Company	
Rhonda	Rhonda Runde
Company	
Explorer Pipeline Company	
Richard	Richard Ruszenas
Company	
Explorer Pipeline Company	
tschatz	Tara Schatz
Company	
Explorer Pipeline Company	

Task ID: TRX\_SALES\_017\*

Task Name: Enter refund checks

Description: Does not include posting.

Category: Sales

User ID	Name
plasiter	plasiter
Company	
Explorer Pipeline Company	
plasiter2	Pamela Lasiter
Company	
Explorer Pipeline Company	
Rhonda	Rhonda Runde
Company	
Explorer Pipeline Company	

Task ID: TRX\_SALES\_019\*

Task Name: Sales series post

Description: Includes all posting of the sales series.

Category: Sales

User ID	Name
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Jean	Jean McAuley
Company	
Explorer Pipeline Company	
Igraves	Leslie Graves
Company	
Explorer Pipeline Company	
plasiter	plasiter
Company	
Explorer Pipeline Company	
plasiter2	Pamela Lasiter
Company	
Explorer Pipeline Company	
Rhonda	Rhonda Runde
Company	
Explorer Pipeline Company	
Richard	Richard Ruszenas
Company	
Explorer Pipeline Company	
tschatz	Tara Schatz
Company	
Explorer Pipeline Company	

Task ID:

TRX\_SALES\_020\*

Category:

Sales

Task Name:

Edit posted Receivables transactions

Description:

Can waive finance charges, mark customer payments as NSF, and void or post receivables transactions.

User ID	Name
plasiter	plasiter
Company	
Explorer Pipeline Company	
plasiter2	Pamela Lasiter
Company	
Explorer Pipeline Company	
Rhonda	Rhonda Runde
Company	
Explorer Pipeline Company	

Task ID:

TRX\_SALES\_021\*

Category:

Sales

Task Name:

Edit other Receivables transactions

Description:

Does not include posting.

User ID	Name
Jean	Jean McAuley
Company	
Explorer Pipeline Company	
Igraves	Leslie Graves
Company	
Explorer Pipeline Company	
plasiter	plasiter
Company	
Explorer Pipeline Company	
plasiter2	Pamela Lasiter
Company	
Explorer Pipeline Company	
Rhonda	Rhonda Runde
Company	
Explorer Pipeline Company	
Richard	Richard Ruszenas
Company	
Explorer Pipeline Company	
tschatz	Tara Schatz
Company	

Explorer Pipeline Company

Task ID:

Task Name:

Description:

TRX\_SALES\_022\*

Enter/edit Receivables batches

Does not include posting. Also includes the Receivables Batches list, preview, and customization.

Category:

Sales

User ID	Name
Jean	Jean McAuley
Company	
Explorer Pipeline Company	
Igraves	Leslie Graves
Company	
Explorer Pipeline Company	
plasiter	plasiter
Company	
Explorer Pipeline Company	
plasiter2	Pamela Lasiter
Company	
Explorer Pipeline Company	
Rhonda	Rhonda Runde
Company	
Explorer Pipeline Company	
Richard	Richard Ruszenas
Company	
Explorer Pipeline Company	
tschatz	Tara Schatz
Company	
Explorer Pipeline Company	