

Kursprogram Introduktion till tjänstebaserade affärssystem (SAFFK-INTRO)

Labb 1

Hösten 2018

7,5 hp

Goal

- To familiarize yourself with a modern, service based ERP-System for small companies without manufacturing

Learning outcomes

- Ability to navigate and recognize common areas and functions in an ERP system
- Ability to establish a valid company in an ERP system
- Ability to execute common processes related to customer management, order fulfilment and procurement
- Ability to import and export data from and to other business applications

Dictionary of technical words/concepts

1. VAT
2. Quote /Offer/ - offert
3. Vendor
4. Purchase order
5. Bill/Invoice
6. Sales Order
7. Receiving notes
8. Balance
9. Inventory
10. Stock
11. Delivery note

Part one - Basics

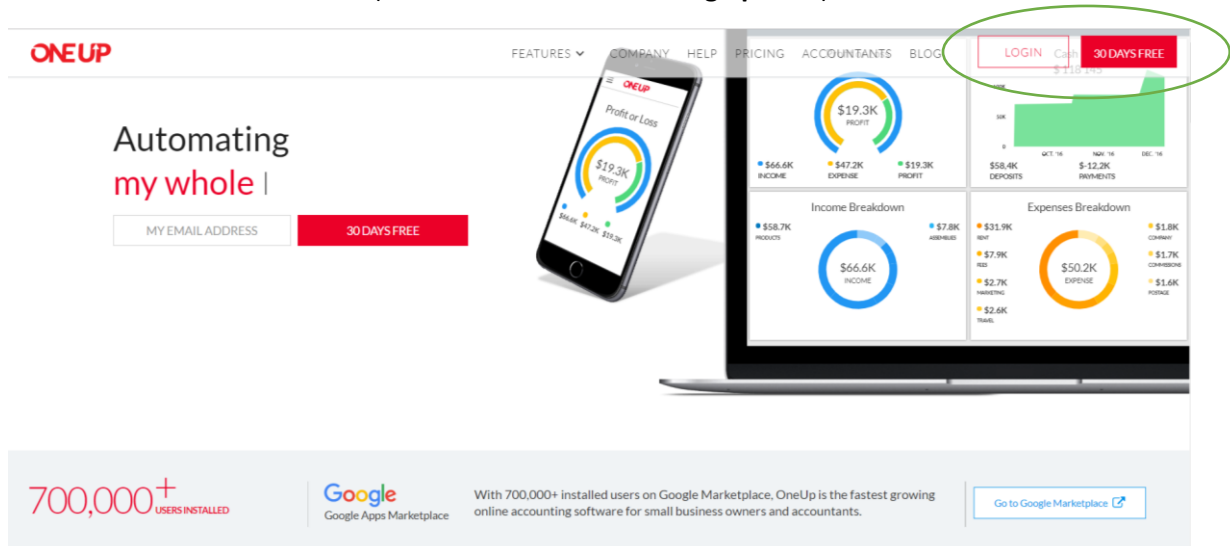
In this section you should do the following:

- Read instructions carefully, read the instructions before you carry out each task
- Signup to ONEUP /myERP/ - establish a company
- Create new customer / new Customer/ - **KUND**
- Create new Vendor /- **LEVERANTÖR**
- Create new product/- **PRODUKT**
- Read scenarios described in different parts and understand what you are doing

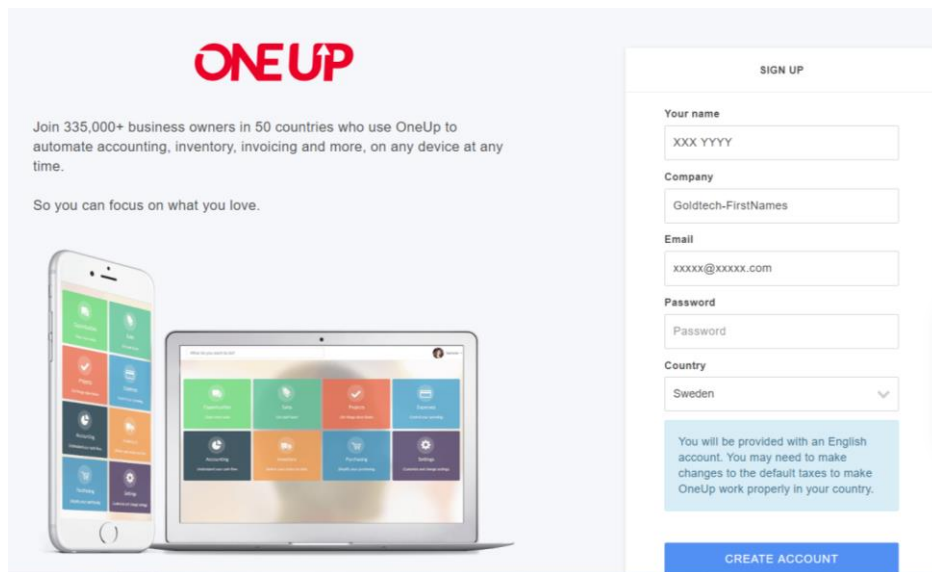
1. Signup to ONEUP

Steps: - Creating an account /signup/

- Start a browser and open www.oneup.com or www.myERP.com
- Click **30 DAYS FREE** or (Click **LOGIN** then Select **Sing up Now**)



- Enter your information and create a password



ONEUP

Join 335,000+ business owners in 50 countries who use OneUp to automate accounting, inventory, invoicing and more, on any device at any time.

So you can focus on what you love.

SIGN UP

Your name
XXX YYYY

Company
Goldtech-FirstNames

Email
xxxxx@xxxxx.com

Password
Password

Country
Sweden

You will be provided with an English account. You may need to make changes to the default taxes to make OneUp work properly in your country.

CREATE ACCOUNT

Enter your FirstNames
Example JamesElin

- When you are done with entering all necessary information, enter Goldentech-**FirstNames** as your company then click on **CREATE ACCOUNT**
- Follow the step through questions by Clicking **Lets Go**
 - “Do you track leads and prospective sales? ...” > Click **Yes**
 - “Do you want to use ONEUP for sales and invoicing? ...” > Click **Yes**
 - “Do you want to track tasks and projects with ONEUP? ...” > Click **Yes**
 - “Do you track company expenses? ...” > Click **Yes**
 - “Do you track product inventory? ...” > Click **Yes**
 - “Do you want ONEUP to handle your accounting? ...” > Click **Yes**
 - “What is your company Name and Address? ...” you can enter your company address here > Click **Next**
 - “Do you want to add your logo? ...” > If you want you can add a valid picture from your computer as your company’s logo, then Click **Next**
 - “Moms Settings” > Select **Yes** if your company processes tax or moms, here you can accept the default values or change tax rates. Leave it as it is, click **Next**

Moms Settings

Does your company process tax or Moms? Yes No

Sales or Input Tax

Tax Label Standard rat *	Tax Rate 20.00 % *	
Tax Label Lower rate *	Tax Rate 5.00 % *	🗑️
Tax Label Zero-rated *	Tax Rate 0.00 % *	🗑️
Tax Label Exempt *	Tax Rate 0.00 % *	🗑️

[+ Add a tax](#)

Purchasing or Output Tax

Tax Label Standard rat *	Tax Rate 20.00 % *	
Tax Label Lower rate *	Tax Rate 5.00 % *	🗑️
Tax Label Zero-rated *	Tax Rate 0.00 % *	🗑️
Tax Label Exempt *	Tax Rate 0.00 % *	🗑️

[+ Add a tax](#)

Back
Skip
Next

- “Choose your accounting settings” > in most cases accounting fiscal year starts on January 1, so leave it as it is, specify name and email for accounting, then Click **Next**

Choose your accounting settings

FISCAL YEAR ?

Starts January 1 ▼

INVITE YOUR ACCOUNTANT, BOOKKEEPER, OR CPA ?

Your accountant will save a lot of time since they will not have to enter your accounting twice. They will also be able to advise you in real time!

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- Click **Let's go** – now you are ready to use **ONEUP** see the next diagrams



All Done!

Your account is now tailored for your business and you're ready to see how wonderful it is to run your business from one place.

Click "Let's Go" to start using OneUp.

Let's Go!

ONEUP

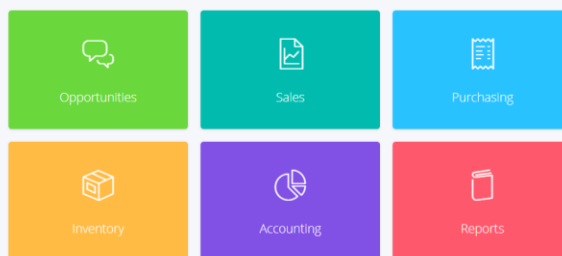


- Home
- Opportunities
- Sales
- Purchasing
- Inventory
- Accounting
- Reports
- Apps

Good Afternoon Workneh!

What do you want to do?

Apps



Tips

Enter some products or services

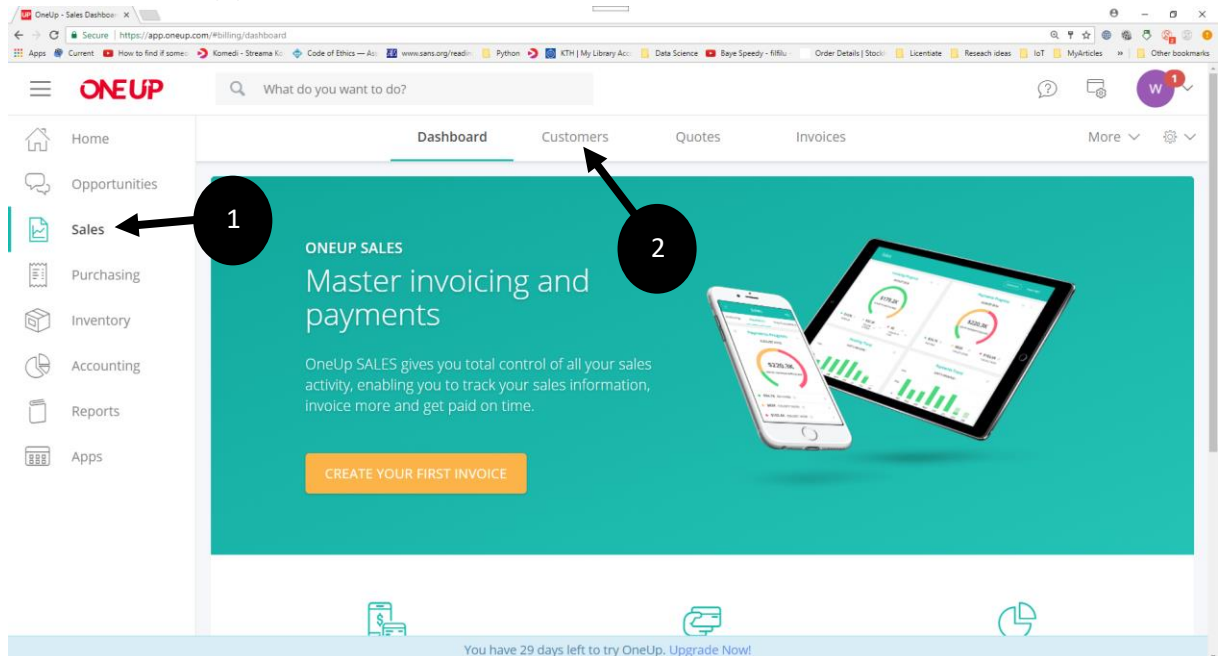
What you sell is at the core of your business. Enter some products and services to use on invoices, quotes, and other documents.

Create a product or service Remind me later

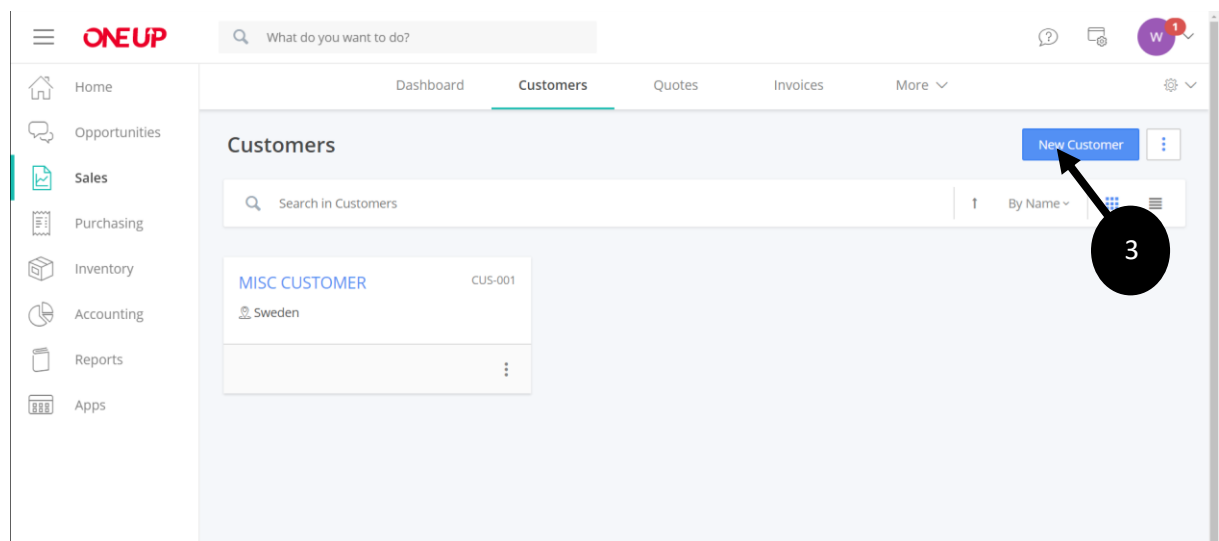
2. Creating a new customer / new Customer/ - KUND

Steps:

- Select **Sales (1)**
- Select **Customer (2)**



- Select **New Customer (3)**

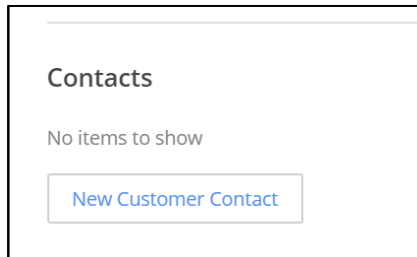


- Enter company name Address, city, phone number, email, web site ... etc
- Note: there are two types of Customers namely Company or Individual – you can chose either of this.
 - Create company – Clas Ohlson-firstNames
 - Address - Hanstavägen 55
 - Zip Code- 164 91
 - City Kista
 - Country -Sweden
 - Tel 46 8 594 610 70

- And other information like email
 - o Enter your email address (use group members email)

Create two contact persons for this company

- Also click on **New Customer Contact** to create contacts for the customer or the company



- Your name – member of your group , youremail@yourmailcompany.com, Telephone
 - Your name – member of your group, youremail2@yourmailcompany.com, Telephone
- **Exercise 1: enter customer number – 1234 –group number, employee count – 50, Payments of terms - (At 30 days, VAT – 25%), Industry-(Retail), Incorporation status – (LLC), VAT Number –(900)**

<

New Customer

Finance

Payment Terms

At 30 days

Price Family

All Price Families

Sales Tax

25.0% vat (Deductible)

Priority VAT on the product VAT

Yes

No

Business

Code

Employee Count

1

Industry

None

Incorporation Status

None

Opt-in to Emails

Yes

No

VAT Number

Create an account based on another ac...

11100 (Accounts Receivable:Miscella

Notes

Notes

- Click **Done** when you are done

Exercise 2: Create two other customers, one company and one individual

3. Creating a new Vendor /- LEVERANTÖR

Under **Purchasing** select **New Vendors**, enter all required entries and one or more contact person(s)

Exercise 1: in this case create Biltema from Sweden, enter all other required fields, and add two contact persons for Biltema as illustrated below.

https://app.oneup.com/#vendor/new

New Vendor

Overview **Company** Individual

Company Name !

Email

Phone Number Website

Address

Billing address

Line 2

Postal/Zip Code City

Country
Sweden

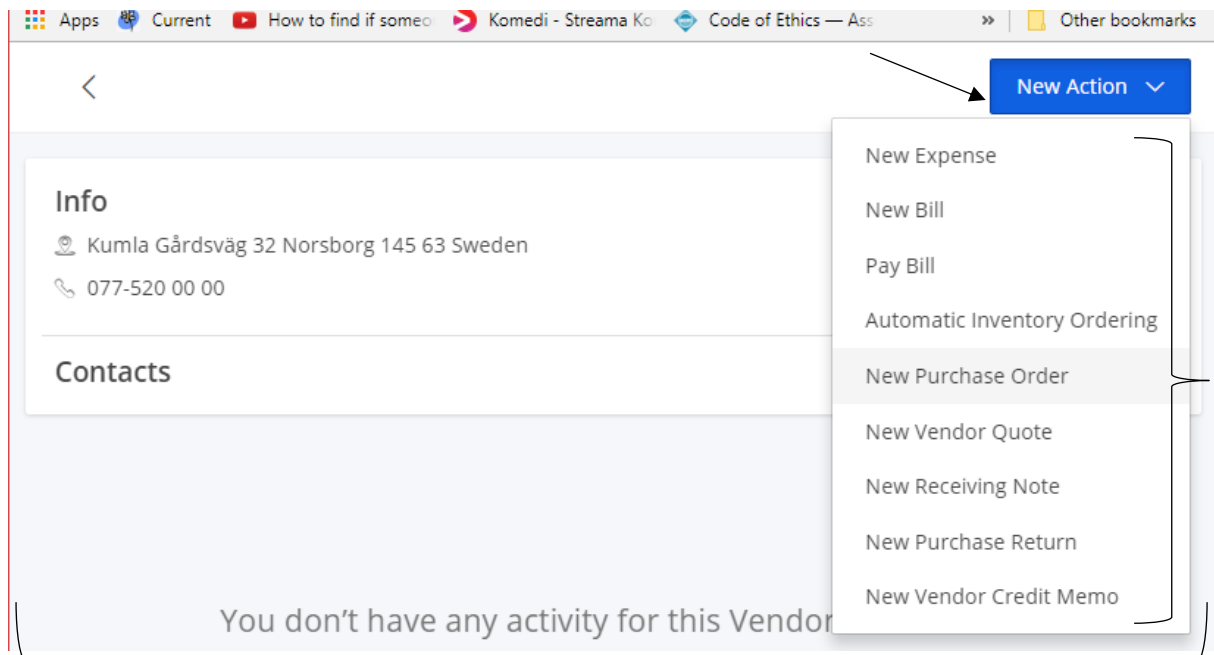
Contacts

First Name Last Name * Email Phone

New Vendor Contact

Cancel Done

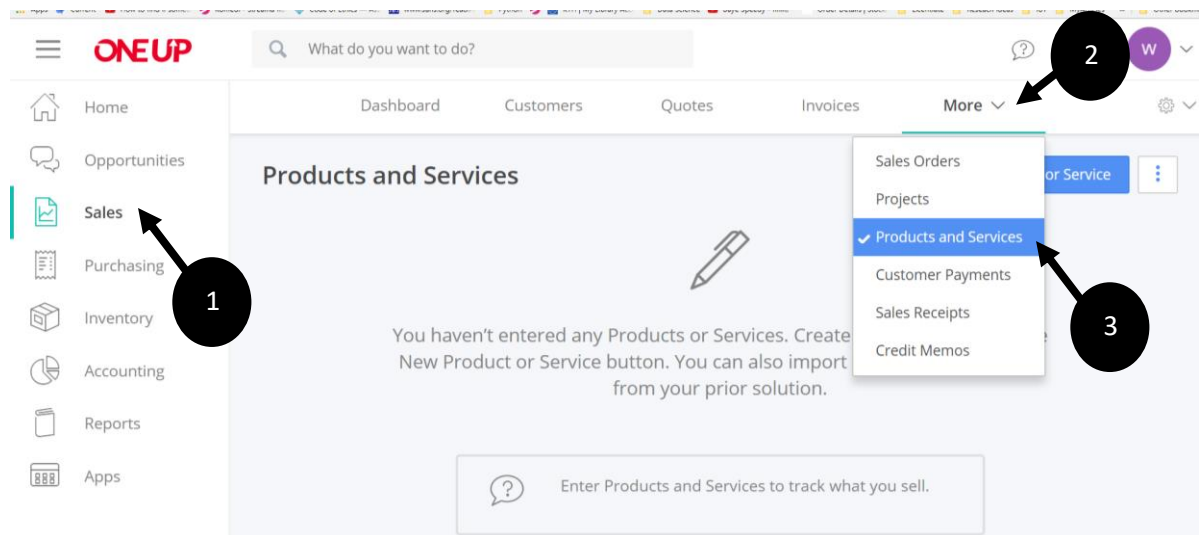
Note: Under **New Action** while Biltema is actively selected notice that you can create **Bills, Purchase Order**, enter **Vendor Quote**, and so on. Now move to the next page **don't do anything here.**



4. Creating new Products and Services

Create product and services by importing from other systems with supported format

- Select **Sales**
- Click on **More** then click on **Products and Services**



- Select **New Product or Service** , (create one product, Name: Candle, Unit: Piece, SalesPrice: 150, ItemNumber: IT-1236, etc) > Click **Done**

Note:

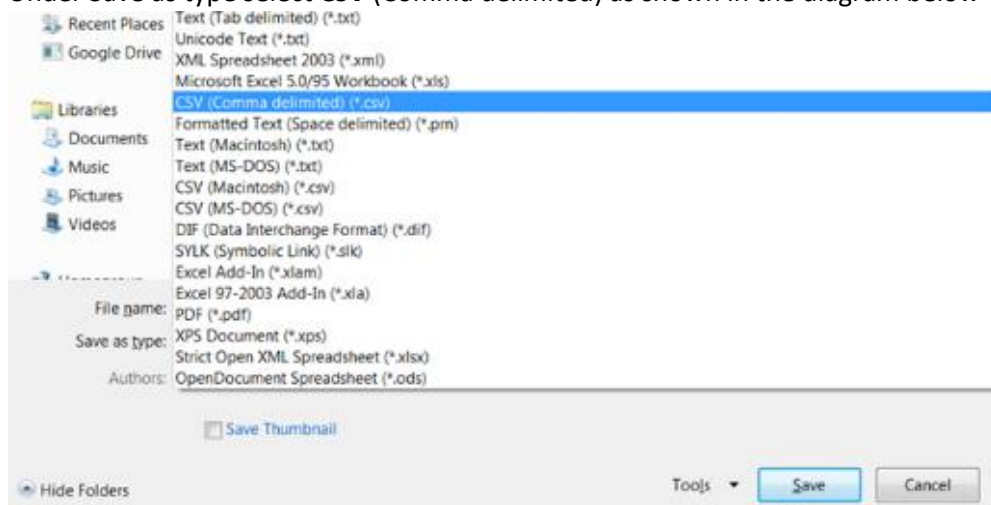
Products and services can be imported from csv (comma delimited file) or space or semicolon (;) delimited files. In most cases, ERP systems have the facility to import and export products, vendors, services, and others from and to files that are readable by any system.


5. Creating new Products and Services by importing from a csv file

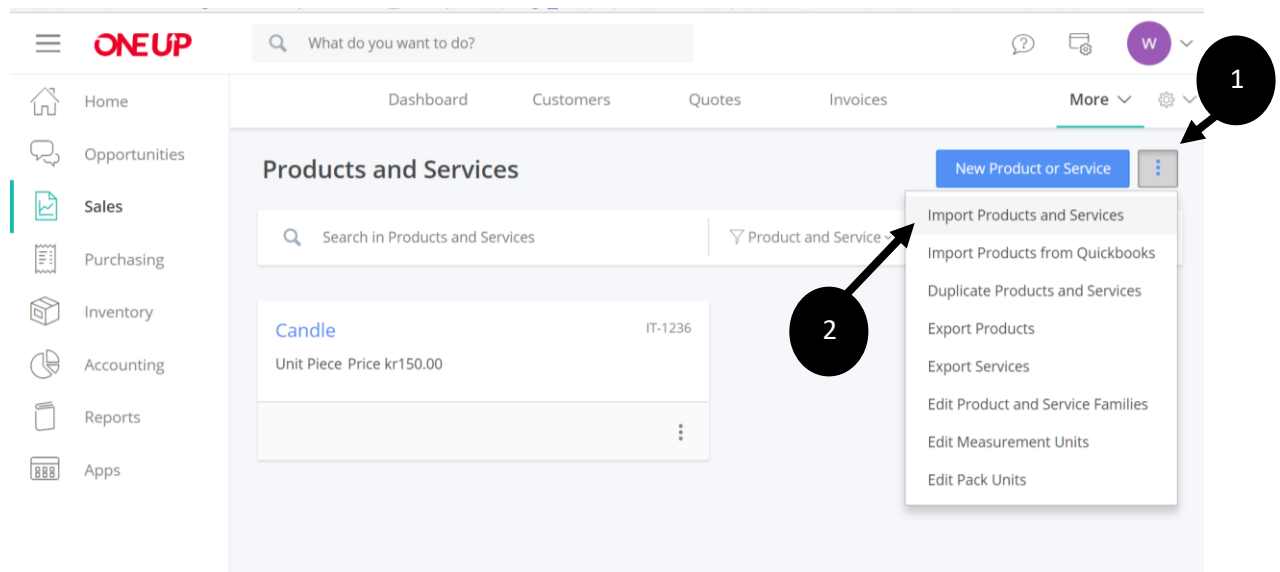
- Create the following table on spreadsheet application, then save it as csv file.
- (What should you do in order to save it as csv file?)
 - Start **Microsoft Excel**,
 - Enter the following information exactly as shown below

Item Name	Type	Manage Inventories	Description	Unit	Sales Price	Purchase Price	Quantity on Hand
Consultation	Service		Consult with a client	Hour	80.00		
Wool Sweater	Product		Wool Sweater (Red, Any Size)	Piece	64.99	49.98	
MP3 Player	Product	Manage Inventories	Black 8GB MP3 Player	Piece	29.99	18.98	74

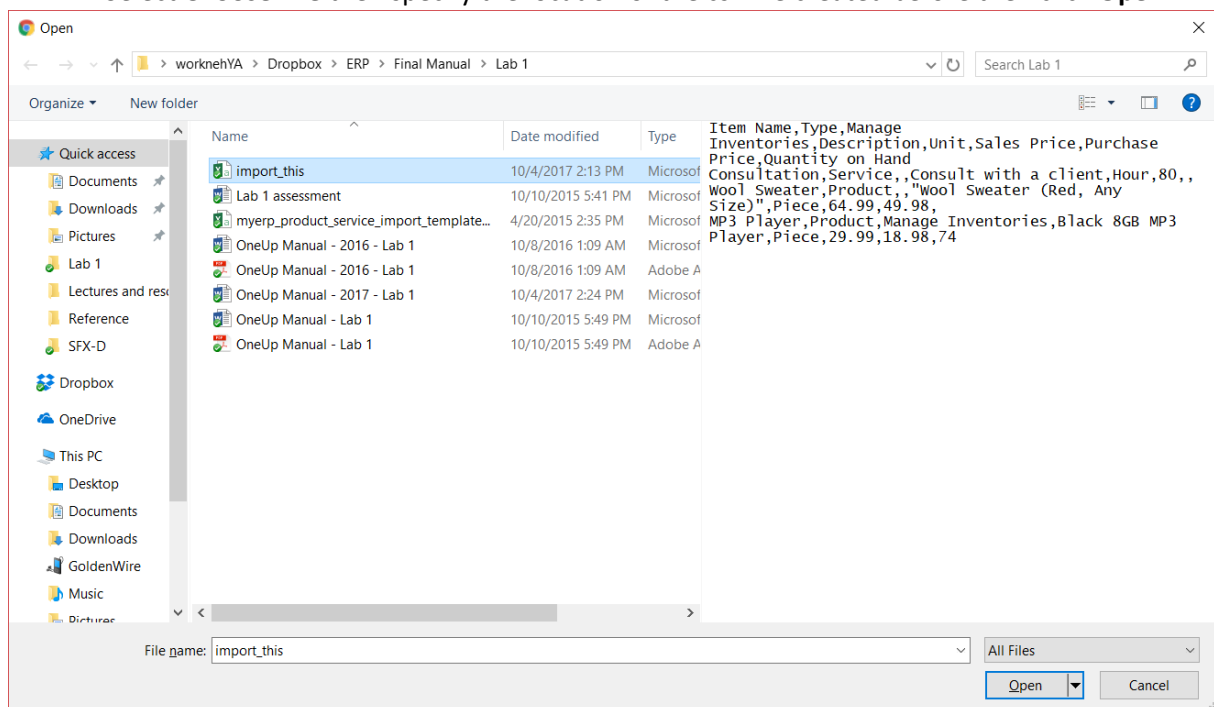
- Select **Save**
- Enter file name (type - product)
- Under Save as type select **CSV (Comma delimited)** as shown in the diagram below



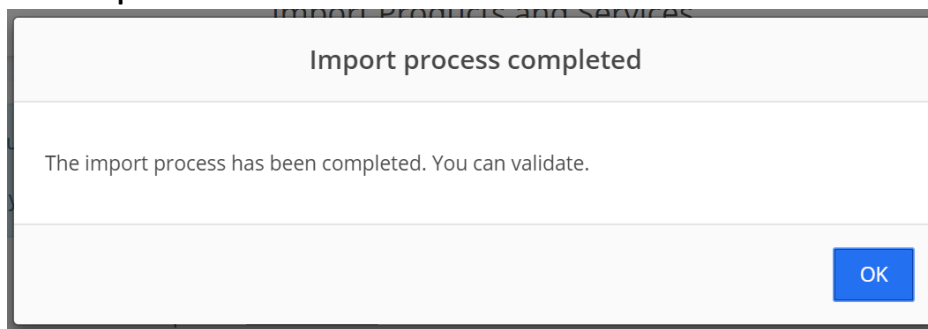
- Click **Save** button
- Open the file and read the content, close the file without changing any information
- After you created the excel file and saved it as csv, If you don't see the **New Product or Service** then go to **Sales** under **More** select **Products or Services** as illustrated in Section 4, under **Creating new Products and Service**.
- Select the vertical ellipsis.  then choose **import products and services**.



- Select **Choose File** then specify the location of the csv file created before then click **Open**.

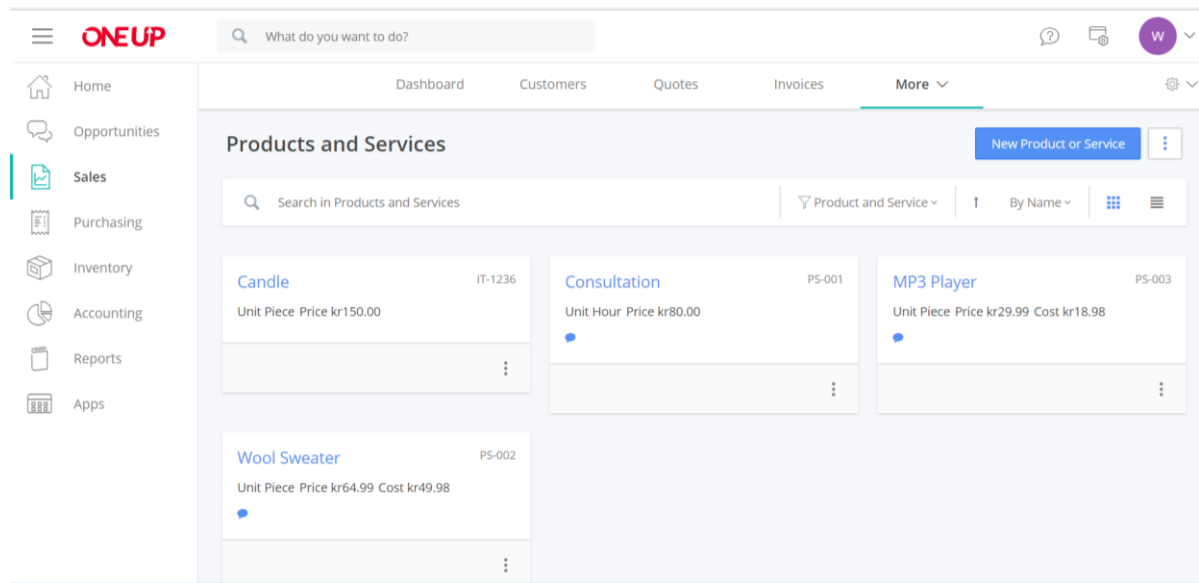


- Select **Advanced** then enter comma “,” under **Separator**
- Select **Import**



- If you see Import process completed message as illustrated above then you are good to go so Click **OK** and or **Done**

- Result: Now go to **Services** under **Sales** to see the consultation serves created as illustrated below



Exercise 1: How many products are created?

Exercise 2: How many services are created, what kind of service has been created?

Exercise 3: Download myerp_product_service_import_template_SIMPLE_rev6.csv file and open it, compare this file with the file your created as product.csv. Discuss your reflections within your group, one – five minutes is enough.

Exercise 4: Create a product (Printer, price 4500, brand – HP) ...

Part two – Inventory Order Handling

In this section you should do the following:

- Read the scenario described for each questions
- Create a new vendor
- Create vendor quote with a new product
- Converting vendor quote to purchase order
- Converting purchase order to Bill
- Converting Purchase Order Receiving Notes
- Convert Purchase Order to Bill
- Pay the Bill

Create a new vendor and a new product “Pencil”

1. Vendor / Vendor Quotes with new Product

Vendor: (**Vendor-firstNames**) is situated in central Stockholm at the Sveavägen 144, the vendor. After you have read on a newspaper that the “**Vendor-firstNames**” has an offer to sale pencils with 20% discount, you decided to create the vendor and the product in your system. From the newspaper you have understood that the contact person is **Vendor-contact-firstNames**. **Vendor-contact-firstNames** is responsible for contacting customers for the company.

Steps: - Create a vendor with Vendor-firstNames

- Click **Purchasing** on the left bar of the screen then select **Vendors**
- Select **New Vendor**
- Enter vendor name **Vendor-firstNames**
- Specify address, city, email (of one of yours), and contact address

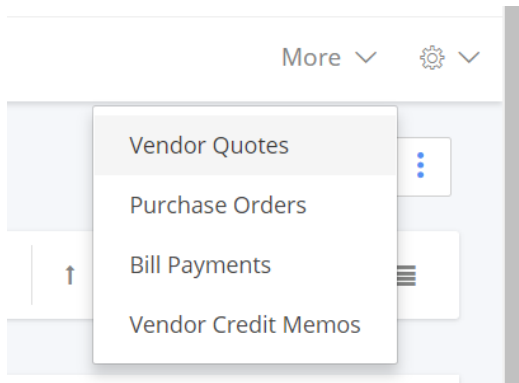
Exercise 1: without leaving this page create Recipient “contact”, use first name and last name of one of your group member, specifying supplier as **VendorContact – firstName** without typing supplier, enter other information.

- Click **Done**

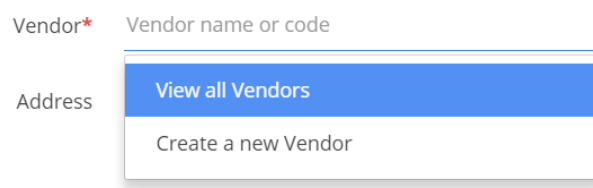
Vendor Quotes - Use vendor quote to record offers that your vendors give you to sell products at a specific price. Once you approve a vendor quotes, you can convert them to purchase orders or bills.

Steps: - Create a vendor quotes and the new product

- Click **Purchasing**
- choose on **Vendor Quote** from **More**

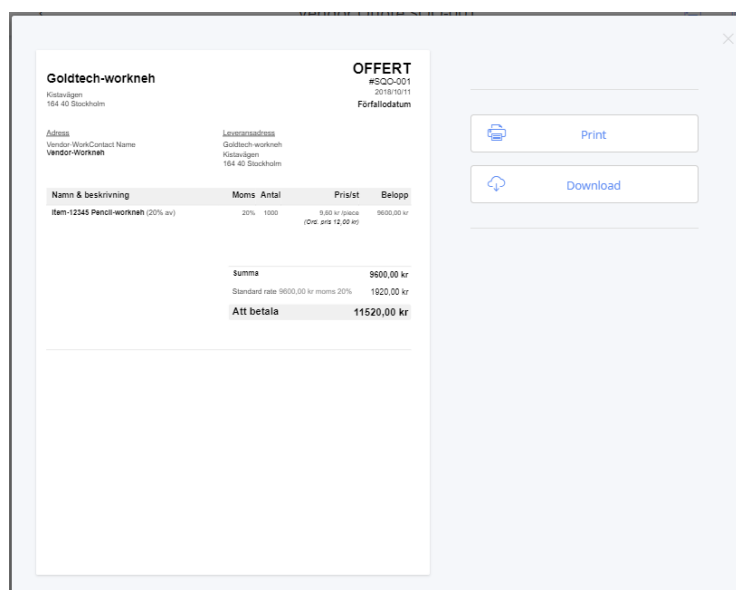


- Select **New Vendor Quote**
- Find and attach vendor (**Vendor- firstNames**) created in the previous step as shown below



- Select **View all Vendors**
- Select your new vendor (Vendor-FirstNames)
- Register vendor quote with current date as in **Expiration date**
- **Select Vendor Recipient contact you created earlier in the previous step**
- click **Add Product** you can select existing products but now click on **New**
- (Create a product with Product name: Product-firstName (ex. Pencil-Mark), unit- piece, sales price-20.00, Purchase Price-12.00, item Number - Item-12345, description -Pencil – (Reference number- Pencil-2017))
- Leave the other entries as it is then click **Done**
- Select the Product with Item-12345 **Product Code**, then click **Select**
- Enter the discount under **Disc.%** =20, **Qty** =1000.

Your screen should look like the following diagram **but the names, dates and prices are different from your data:**



- Click **Done**
- Select **Download PDF** then save it on the desktop as **QuoteFromVendor-firstName**

Exercise 2: change the quantity of the ordered product to 100

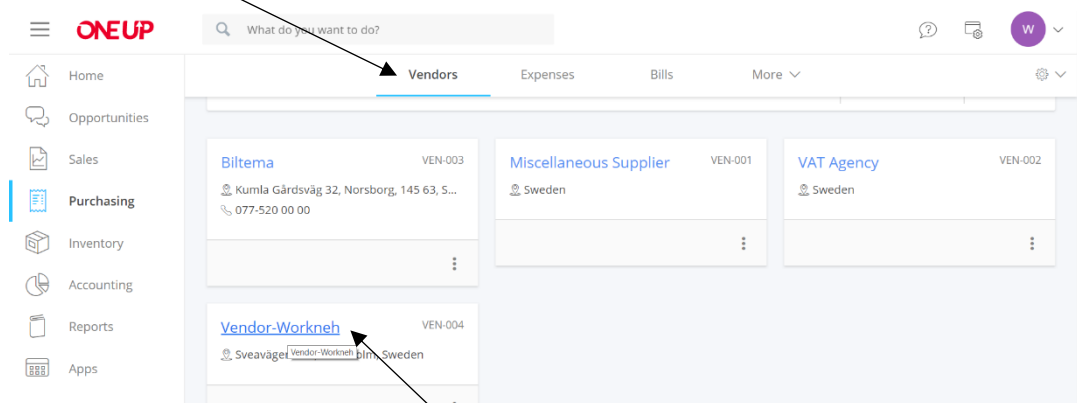
2. Convert Vendor Quotes to Purchase Order

Purchase Orders - Use Purchase Orders to record orders you've placed with your vendors. Purchase orders can be converted into receiving notes or bills.

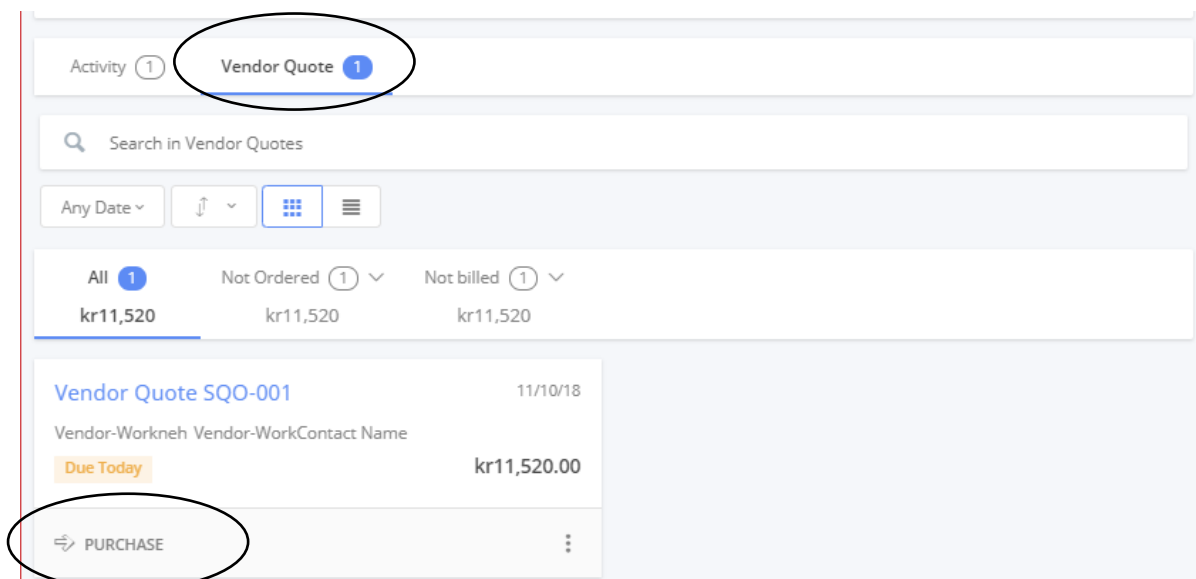
? Create purchase order

Steps:

- Under **Purchasing**
- select **Vendors**



- Select your vendor (**Vendor-firstNames**)
- Under **Vendor Quotes**
- Select **Purchase**



- **New Purchase Order** will be displayed as illustrated below

New Purchase Order

Vendor* Vendor-Workneh (VEN-004)

Address Sweden

Recipient Vendor-WorkContact Name

Ref. Number

Date* 11/10/2018

Payment Terms Due on receipt

Code SOR-001

[Vendor Quote : SQO-001](#)

	Description	Qty	Outstanding	Price	Disc.%	Total	VAT%
Item-12345	Pencil-workneh	100.00	100.00	12.00	20.00	960.00	20.0% Stat

Add Product

Delete

↑

↓

Document Note

Subtotal 960.00

Discount Rate 0.00

Discount Amount 0.00

Cancel

Done

- Select **Done**
- Now you will see that the Vendor Quote has been converted to Purchase Order but not yet Billed

< Back
Vendor Vendor-Workneh
New Action

Info

Sveavägen 144 Stockholm
Sweden

Contacts

Activity 1 **Vendor Quote 1**

Search in Vendor Quotes

By Expiration Date Any Date

All 1	Not Ordered 0	Not Billed 1	
kr1,152	kr0	kr1,152	

<input type="checkbox"/>	Vendor Quote Date	Vendor Quote	Vendor	Amount	Notes	Expiration Date	Status
<input type="checkbox"/>	05/10/17	SQO-001	Vendor-Wor...	kr1,152.00			<div style="background-color: #007bff; color: white; padding: 2px 5px;">Ordered</div> <div style="background-color: #ffc107; color: black; padding: 2px 5px;">Not Billed</div>

Now go to **Inventory** (by clicking on Inventory from the left side) > select **Stock** > you will read 0 under **Qty On Hand** as illustrated below but the price shown below can be different from your price

The screenshot shows the ONEUP interface with the 'Inventory' section selected on the left. The 'Stock' tab is active, displaying a table of inventory items. The table has columns for Item Number, Name, Description, Price, Cost, Unit, Location, Qty On Hand, and Available. Two items are listed: 'Item-12345' (vendorContact - firstName) with a price of kr20.00 and 0 Qty On Hand, and 'PS-003' (MP3 Player) with a price of kr29.99 and 74 Qty On Hand. An arrow points from the text above to the 'Qty On Hand' column.

To view the status of your purchase order

- Select **Purchasing** on the left bar of the screen then select **Purchase Orders** from **More**

The screenshot shows the ONEUP interface with the 'Purchasing' section selected on the left. The 'Vendors' tab is active, displaying a list of vendors: Biltema, Miscellaneous Supplier, VAT Agency, and Vendor-Workneh. A dropdown menu is open, showing options: Vendor Quotes, Purchase Orders, Bill Payments, and Vendor Credit Memos. An arrow points from the text above to the 'Purchase Orders' option.

- To see the purchase order created before, **Purchase Order BBB-VVV**

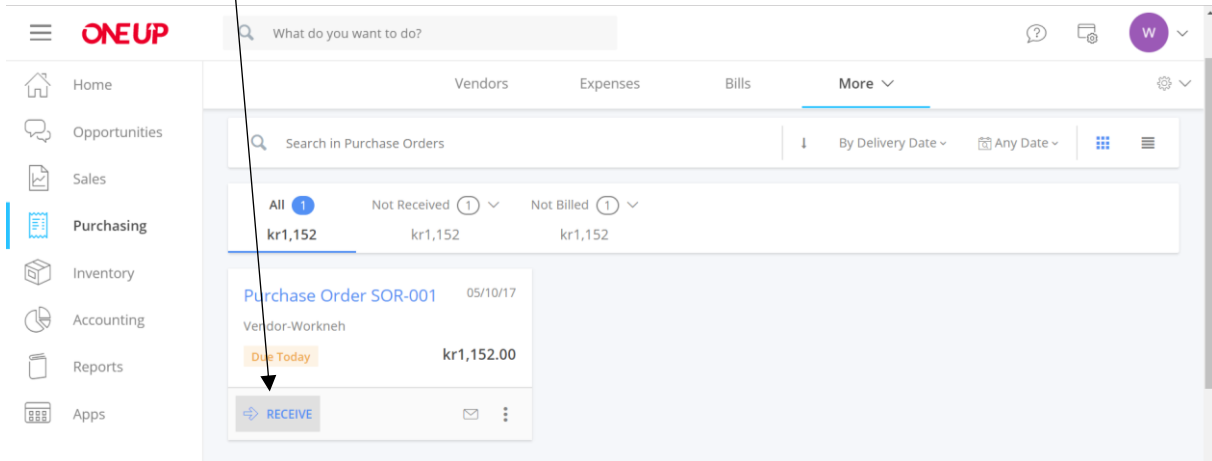
The screenshot shows the ONEUP interface with the 'Purchasing' section selected on the left. The 'Purchase Orders' tab is active, displaying a list of purchase orders. The 'Purchase Order SOR-001' is highlighted, showing details: Vendor-Workneh, Due Today, and kr1,152.00. An arrow points from the text above to the 'Purchase Order SOR-001' entry.

3. Purchase Order to Receiving Notes

Receiving Notes describe the products that are included in a delivery you receive. When receiving notes are entered, inventory transactions are generated.

Go to Purchasing

- Select **RECEIVE**



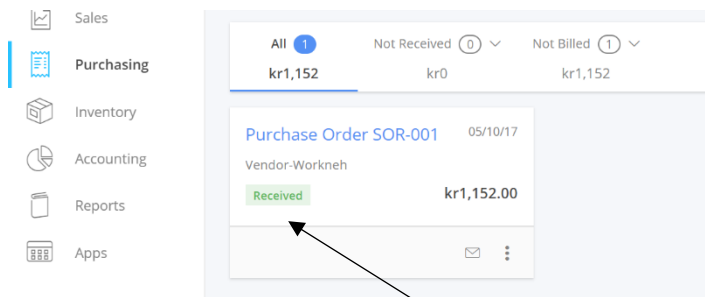
- Now you will see **New Receiving Note** as illustrated below

The screenshot shows the 'New Receiving Note' form. It has several input fields: 'Vendor*' (Vendor-Workneh (VEN-004)), 'Ref. Number' (empty), 'Address' (Sweden), 'Date*' (11/10/2018), 'Payment Terms' (Due on receipt), 'Recipient' (Vendor-WorkContact Name), and 'Code' (REC-001). Below these fields is a blue bar with links: 'Vendor Quote : SQO-001' and 'Purchase Order : SOR-001'. A table lists the items to be received:

Description	Qty	Price	Disc.%	Total	VAT%	Location
Item-12345 Pencil-workneh	100.00	12.00	20.00	960.00	20.0% Ste	MAIN LOCATION 100.0

Below the table is a button 'Add Product'. At the bottom, there are fields for 'Document Note', 'Subtotal' (960.00), and 'Discount Rate' (0.00). At the very bottom are 'Cancel' and 'Done' buttons.

- Select **Done**



- Now the status will be changed to **Received**
- The next step is to pay the bill after the item is received

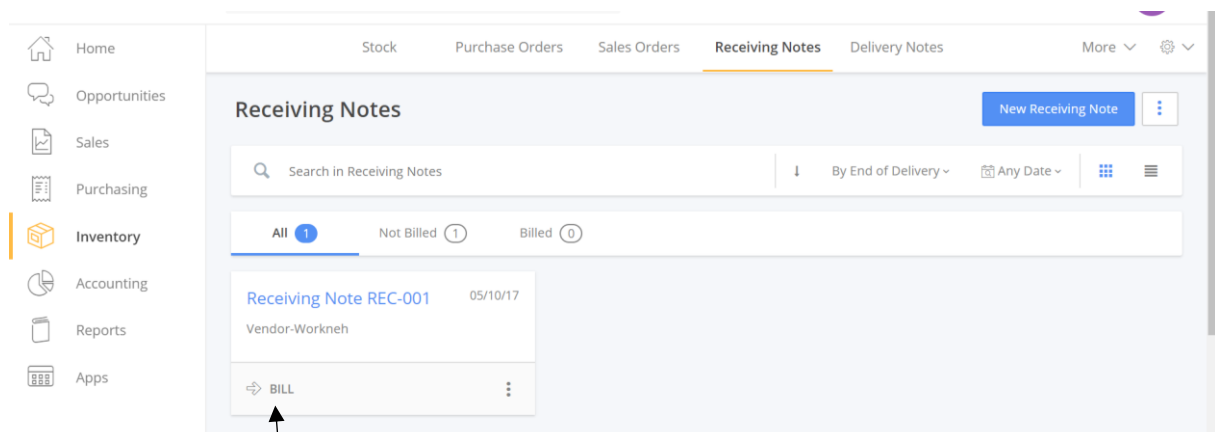
4. Convert Purchase Order Received Note to Bill

Bills -The Bill is the main financial document used to pay your vendors for products. To pay vendors without involving products, use Expenses.

? Create bill

Steps:

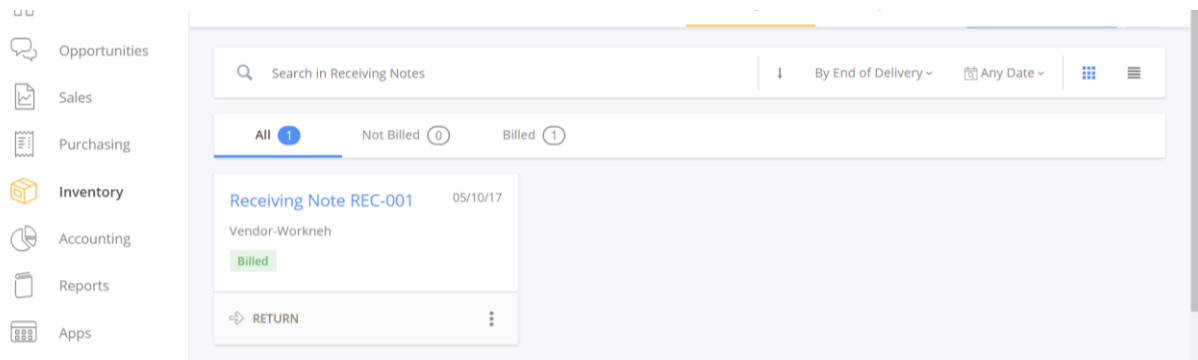
- Select **Inventory** on the left bar of the screen then select **Receiving Note**



- Select the => **BILL**

- If this bill is already paid you can select Settled, however now leave it as it is

- Click **Done**
- Now you see the status is changed to Billed as illustrated below

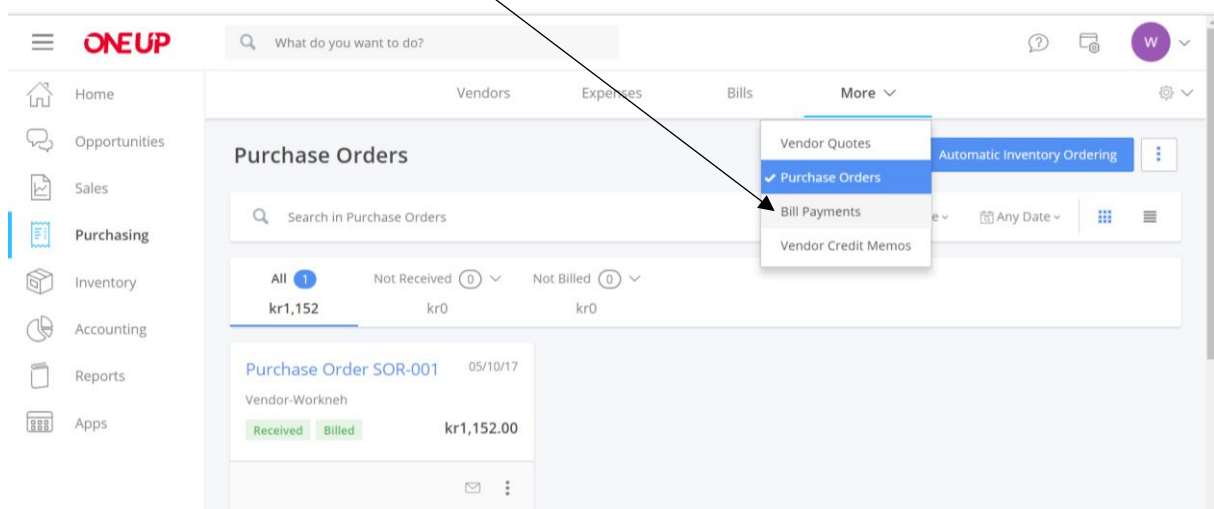


- The next step is to pay the bill

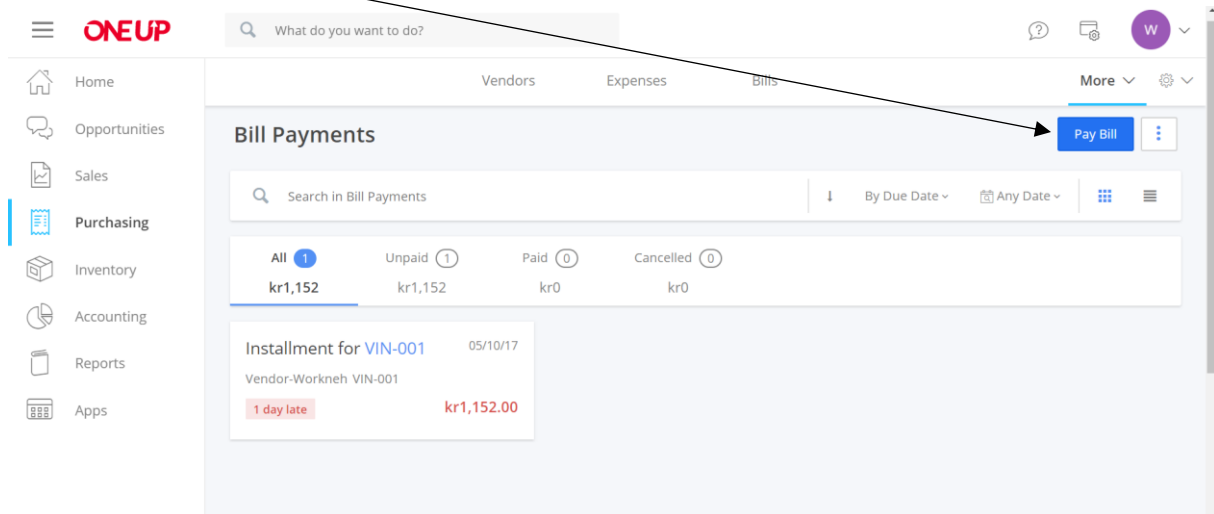
5. Pay the Bill

?Pay the bill

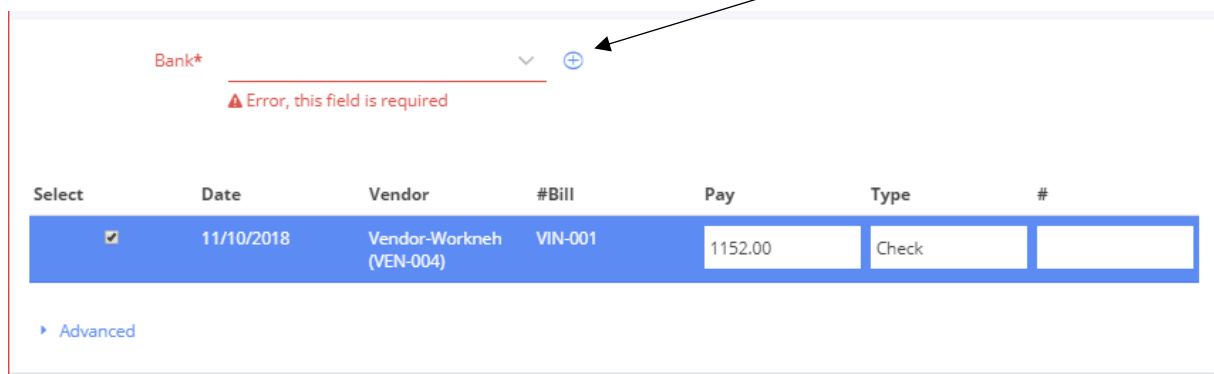
- Select **Purchasing**
- Select **Bill Payments** under **More**



- Select **Pay Bill** from as illustrated in the diagram



- Select Bank > But we don't have any bank here so click on the **Create a new ...** under to **Bank***



- Select Account Type* as **Current Account**
- Enter Name* as Bank-firstNames
- Enter bank number-123456789, Starting Balance-30 000 000 and select date of opening from **as of** – select earlier date

Create a Bank Account

Account Type*	Current Account	▼
Name*	Bank-Workneh	
Number	123456789	
Starting Balance	30,000,000.00	
as of	10/10/2018	📅

▶ [Advanced](#)

Cancel
Done

- Click **Done**
- You will see the list of billed orders to be paid as illustrated below then check the bill you want to pay now,
- (you can change payment and payment type (Cash, Check,...)) the default value is ok for now

< Back
Pay Bill

Bank* Bank-Workneh

Select	Date	Vendor	#Bill	Pay	Type	#
<input checked="" type="checkbox"/>	05/10/2017	Vendor-Workneh (VEN-004)	VIN-001	1152.00	Check	

▶ [Advanced](#)

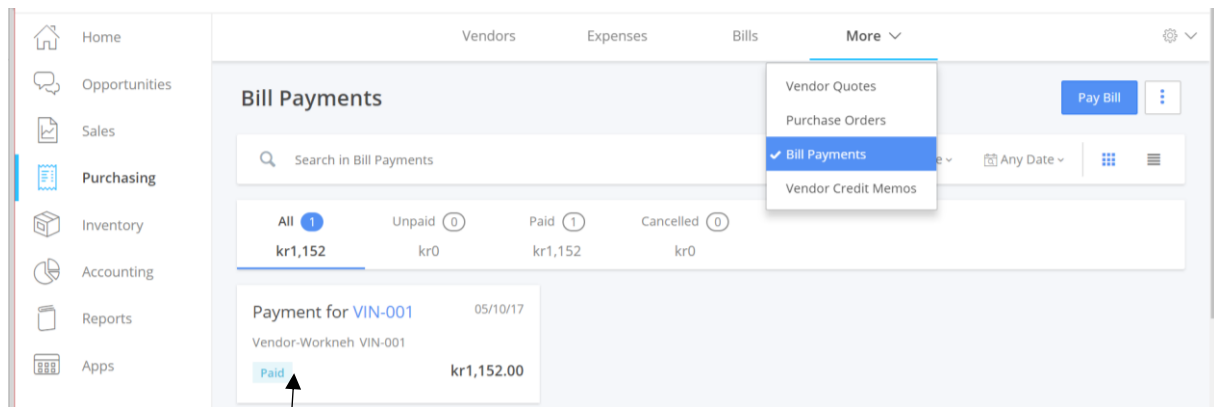
Cancel
Done

Vendor Quote: #S...pdf
Show all X

- Click **Done**

To make sure that the payment is made and settled

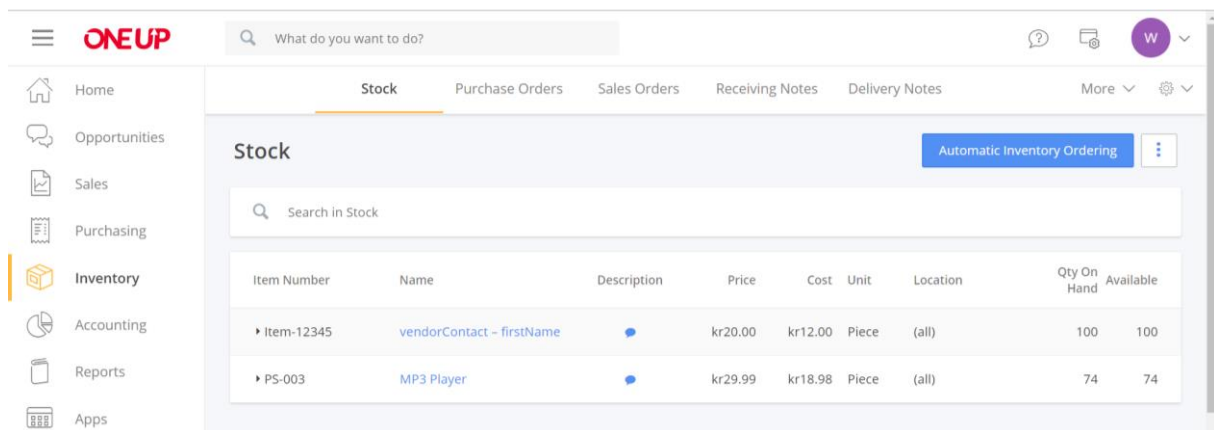
- click on **Bill Payments** from **Purchasing**



- You see your bill now **VIN-001 /your vendor code/**

Check Inventory level

- Select **Stock** from **Inventory** on the left bar of the browser
- You will see that the **Qty On Hand** is – 100



Part three – Customer order handling

In this section you should do the following:

Provided that there are vendors and customers in the system, it is possible to give them an offer and if they accept our offer then that offer can be converted into Sales Orders and to Invoices.

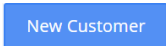
Example: A new customer, Magnus Nicki wants to buy your pencils, this customer wants to buy 25 pencils for his training center. Your manager has decided to offer this customer 5% discount. Handle the business process as follows

Customer created → Customer Quote → convert Quotes to Sales Order → Picking list → Create Delivery Note from Sales Order → convert Delivery Notes to Invoices → Receive Customer Payment/ convert from installment to payment deposits/

1. Create a new Customer and Quotes

Create a new customer with **Customer-firstNames** and a contact person **Yourname firstNames**.

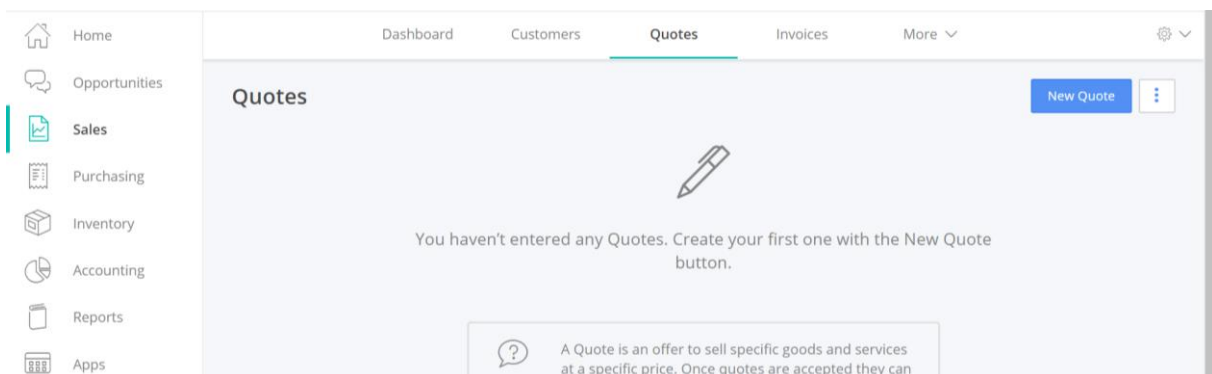
Steps: - Create a Customer with Customer-firstNames

- Click **Sales** on the left bar of the screen then Click on **Customer**
- Select New Customer on the right top corner 
- Select **Individual**
- Enter Name, Address, City, State/Country, Zip Code, and Country
- Click on **New Customer Contact** to create contact person(s) for the new customer
- Enter First Name, Last Name, Email, and work Phone.
- Click **Done**

Offer/Quote - A quote is an offer to sell specific goods and services at a specific price. Once quotes are accepted they can be converted into Invoices or Sales Orders.

Steps: - Create a quotes (offer a discount to your customers for example)

- Click **Quotes** under **Sales**



- choose on **New Quote** on the right side
- Under Lead or Customer, select the customer you just created before – **Customer-firstNames**
- Select **Recipient** that is contact name (created above under the customer)
- register quote with current date as in **Expiration date**
- click **Add Product or Service**
- Select the Product with Item-12345 **Product Code**, then click **Select**
- Enter the discount under **Disc.%** =5, **Qty** =25, also
- Click **Done**
- Click **Download** then save it on the desktop, sample screen shot is shown below, **Note that you can email to the email created just before.**

Stockholm University

OFFERT
#QOT-001
2017/10/05
Giltigt t.o.m 2017/11/04
Förfallodatum

Fakturaadress
Nilt Nakas
Magnus Nicki

Namn & beskrivning	Moms	Antal	Pris/st	Belopp
Item-12345 vendorContact - firstName (5% av) Pencil-2017	20%	25	19,00 kr /piece (Ord. pris 20,00 kr)	475,00 kr
Summa				475,00 kr
Standard rate 475,00 kr moms 20%				95,00 kr
Att betala				570,00 kr

Betalningsinformation

Email

Print

Download

- Send the offer to your customer by clicking on **Email – send it to your friend and show it to your tutor when you are done with all exercises**

2. Convert Quotes to Sales Order

Sales Orders - Sales Orders confirm which products your Leads or Customers have ordered. Sales Orders can be converted into Invoices for billing, Delivery Notes for delivery or Picking Lists for preparation.

Your customer has accepted your offer/quote, now you can create Sales Order

? Create Sales Order

Steps:

- Select **Sales** on the left bar of the screen then select **Quotes**

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Quotes New Quote

Search in Quotes

By Expiration Date Any Date

All 1 Open 1 Not Ordered 1 Not Invoiced 1

kr570 kr570 kr570 kr570

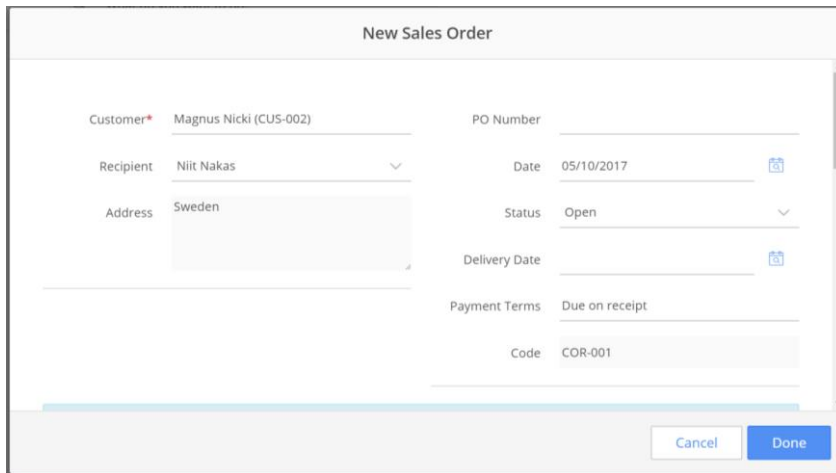
Quote QOT-001 05/10/17

Magnus Nicki Nilt Nakas

In 4 weeks kr570.00

ORDER

- Select => **Order**



New Sales Order

Customer* Magnus Nicki (CUS-002) PO Number

Recipient Niit Nakas Date 05/10/2017

Address Sweden Status Open

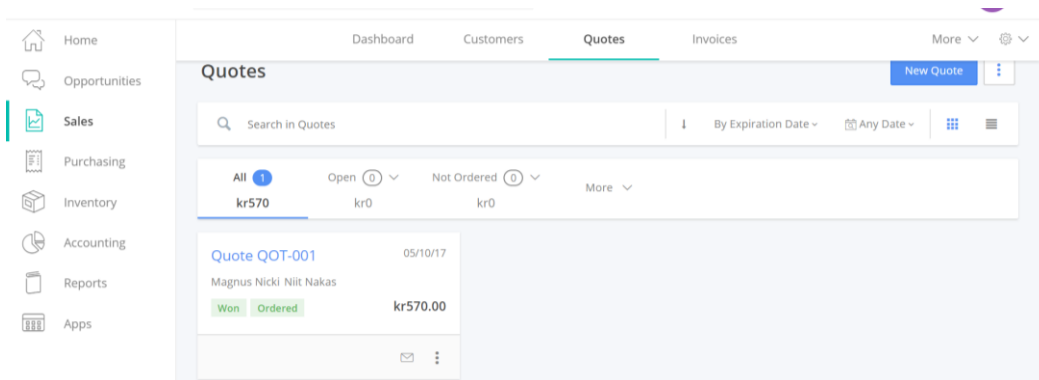
Delivery Date

Payment Terms Due on receipt

Code COR-001

Cancel Done

- Select **Done**
- Now you will be able to read your offer has been accepted or won and the order has been made



Quotes

Search in Quotes | By Expiration Date | Any Date

All	Open	Not Ordered	More
kr570	kr0	kr0	

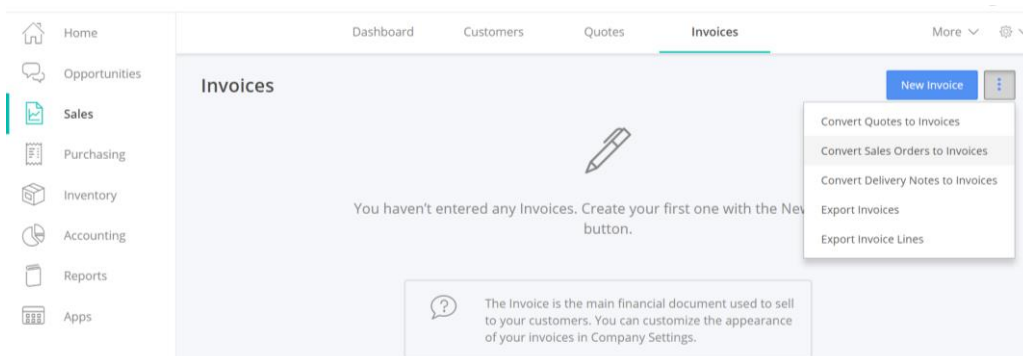
Quote QOT-001	05/10/17
Magnus Nicki Niit Nakas	
Won Ordered	kr570.00

Invoices - The Invoice is the main financial document used to sell to your customers. You can customize the appearance of your invoices in Company Settings.

3. Convert Sales Order to Invoices

Steps:

- Select **Sales** on the left bar of the screen
- Select **Invoices**




- Select **Convert Sales Order to Invoices**

- Select (check) the sales order you have just created from the quote

< Back Convert Sales Orders to Invoices

Advanced

Convert	Date	Customer	Code	Total
<input checked="" type="checkbox"/>	05/10/2017	Magnus Nicki (CUS-002)	COR-001	570.00

Conversion Date 

Cancel Done

- Click **Done**, you can see below that the invoice has been created

Home

Opportunities

Sales



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All 1

Unpaid 1

Paid 0

Cancelled 0

kr570

kr570

kr0

kr0

Invoice CIN-001



05/10/17

Magnus Nicki

1 day late

kr570.00

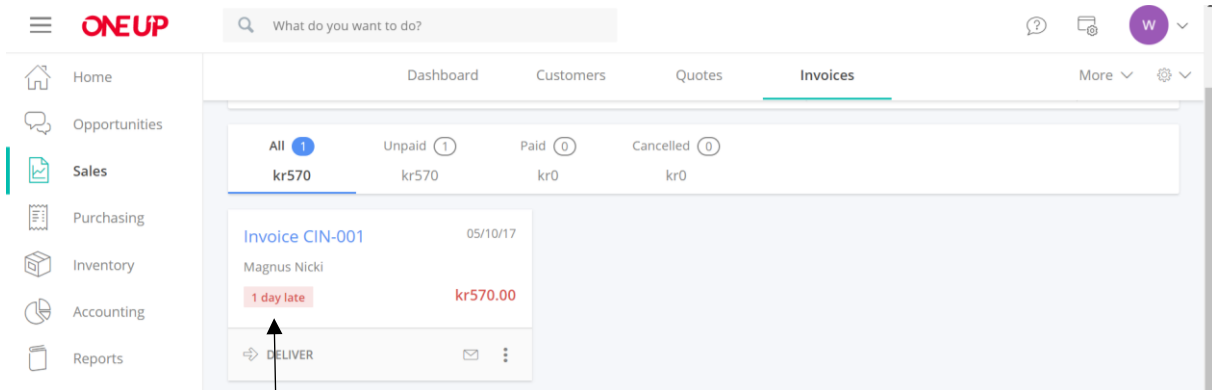
DELIVER

4. Convert Sales Order to Delivery Notes

Steps:

- Select **Sales** on the left bar of the screen then select **Invoices**



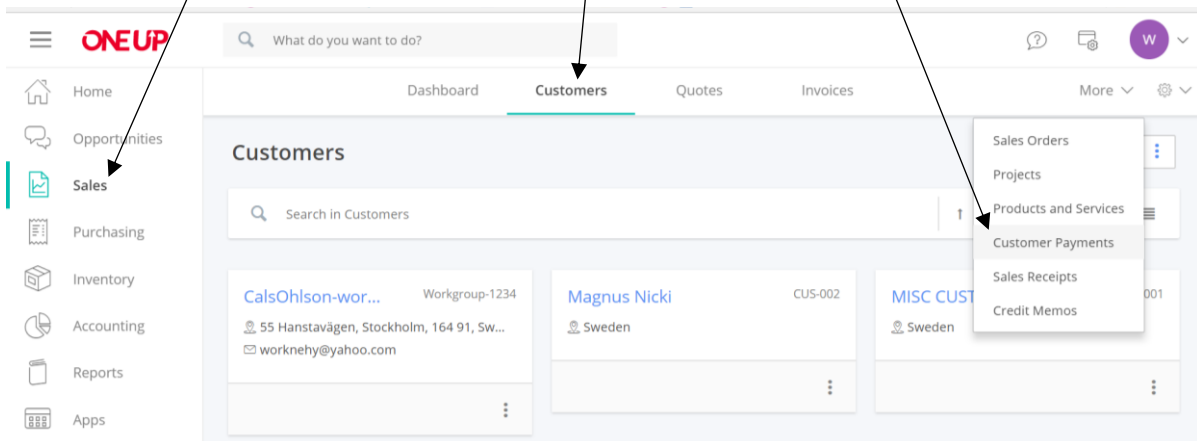
- Select => **DELIVER**

- Click **Done**

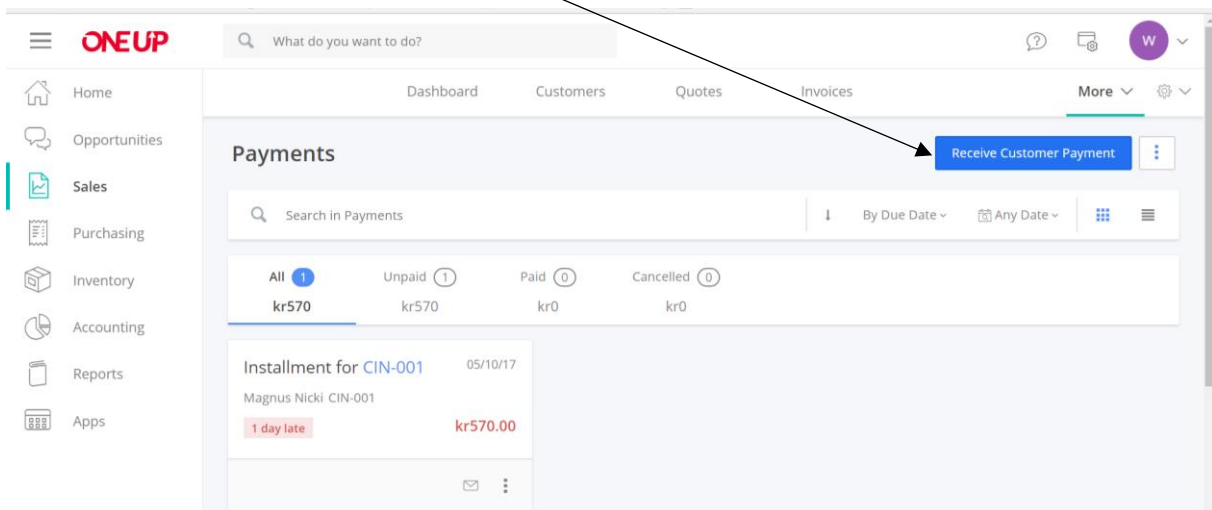
5. Receive Customer Payment - convert from installment to payment deposits

Steps:

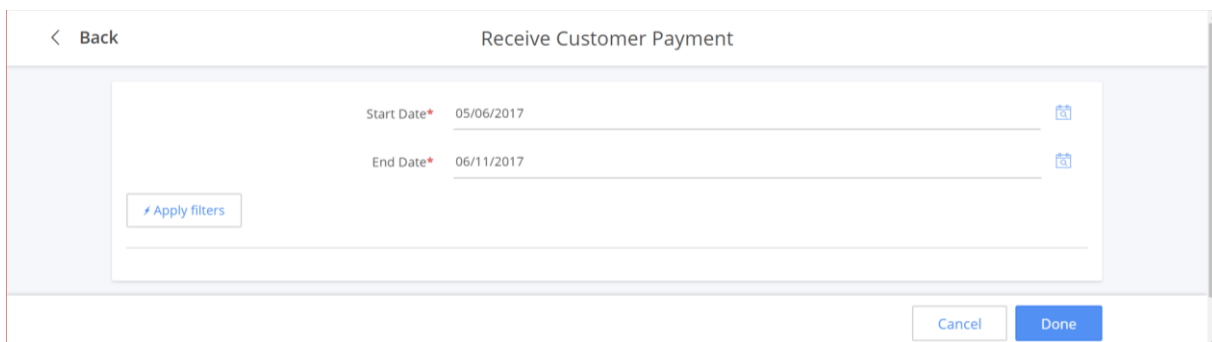
- Select **Sales** on the left bar > select **Customers** > Select **Customer Payments**



- Click **Receive Customer payment**



- Click on **Apply Filters** after specifying the end and start dates if you don't get any list



- Now you will see the pending installment

- Select the row which contains the installment information

Back Receive Customer Payment

Start Date* 05/06/2017

End Date* 06/11/2017

Apply filters

To convert an Installment into a Payment deposit, select a row then click the button below.

Customer	Customer Invoice	Date	Total	Paid	Remaining	% Remaining	Employee	Project
Magnus Nicki	CIN-001	05/10/2017	570.00	0.00	570.00	100.00	Workneh	

Convert the selected Installment into a Payment Allocate a payment deposit Use a Credit Note

Cancel Done

- Click **Convert the selected Installment into Payment**
- Click **Done**
- (now status will be changed to “Paid”, try to refresh you don’t find “Paid”)

ONEUP What do you want to do?

Home Opportunities Sales Purchasing Inventory Accounting Reports Apps

Dashboard Customers Quotes Invoices More

Payments Receive Customer Payment

Search in Payments

By Due Date Any Date

All	Unpaid	Paid	Cancelled
1	0	1	0
kr570	kr0	kr570	kr0

Payment IPA-001 05/10/17

Magnus Nicki CIN-001

Paid kr570.00

Check inventory level now

How many pencils are there in stock level?

Assessment

Use your online tutoring system to book your tutor for evaluation:

Part 1

- 1) Show to your tutor that you have created a customer with VAT number 900, and other two customers are created

- 2) Show the CSV file you created before
- 3) Show how many products and services are created?
- 4) Show the csv file downloaded and explain the difference between the csv file you created to the downloaded one.

Part 2

- 1) Show the downloaded vendor pdf QuoteFromVendor-firstNames
- 2) Show the email you created related to the quote
- 3) Show the downloaded pdf file related with the quote

Part 3

- 1) Show stock level for pencil is changed
- 2) Show that you have created a new customer that purchased your 25 pencils
- 3) Show other related tasks you have done to carry out the customer quote-sales-delivery... process