



Warehouse

Initial

Setup

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This guide gives the procedural order for the initial setup of Warehouse. These steps will need to be followed in order to create your first account.

Create Tax Types

- 1) From Maintenance, click Tax Types
- 2) Click Add Type
- 3) Enter the name of the new tax type (Cigars, Cigarettes, etc.)
- 4) Click Save Type

Create Tax Groups

- 1) In Maintenance, click on the Tax Groups tab.
- 2) Click Add Group
- 3) Enter the new tax group name (generally states you sell to)
- 4) Click Save Group

Create Product Lines

- 1) From Maintenance, click on the Product Lines tab
- 2) Click Add Line
- 3) Enter the name of the product line
- 4) Choose the tax type from the drop down list
- 5) Click Save Line

Create Price Lists

- 1) From Item Maintenance, click on the Price List tab
- 2) Click Add
- 3) Enter the name of the price list and click OK

Create Payment Terms

- 1) In Maintenance, click on Payment Terms tab
- 2) Click Add Term
- 3) Enter the term name
- 4) Click Save Term

Create Account Groups

- 1) From Maintenance, click on the Account Groups tab
- 2) Click Add Group
- 3) Enter the group name
- 4) Select the price list from the drop down list
- 5) Click Save Group

Create Accounts

- 1) From Maintenance, click on the Accounts tab
- 2) Click Add Account
- 3) Enter the account number, account name, and address.
- 4) Select the account group from the drop down list
- 5) Select the payment terms
- 6) Select the Default Salesman for the account.
- 7) Set the primary and secondary delivery dates.
- 8) Select the tax group for the account (If there are not 2 taxes, then tax group 2 will be "NONE")
- 9) Click Save Account