Optimize your Sage Accpac ERP AR system

- part 2 -

- Automatically open your most frequently used AR screens at Accpac Startup
    - Create a folder called Startup
    - Copy and paste all icons for the programs you want to automatically open into this folder (Accpac programs icons, custom reports or macros)
    - Log out and log back in to test this feature
- Speed up data entry with distribution codes and sets.
    - Distribution codes are a quick method of specifying the revenue, inventory, and cost of goods sold general ledger accounts to which you post data from sales transactions.
- Use customer groups to classify your customer records into groups that share similar characteristics. You must define your customer groups before you can add customer records.
    - Customer groups let you set default entries to speed up the task of adding customer records and national accounts
- Use national accounts to group customers whose invoices are paid from a single location (i.e. chain stores). National Accounts Management is a separate module that you can use with any edition of Accounts Receivable. During receipt entry, Accounts Receivable displays the transactions for all members of the national account at once, so you can quickly assign the payment to the applicable customer accounts.
- Develop a logical scheme for assigning item numbers before adding item records. Consider the order in which you want to group items such as in Accounts Receivable Finders, so you can quickly select them during invoice entry. The way items are set up also affects the order in which they list on Accounts Receivable reports
- Set up a price list of the items and services you charge your clients. When you enter an item number on an invoice, Accounts Receivable displays information from the item record, such as the unit of measure and unit price.
- In A/R Set up /Options/Transactions tab set the default invoice type to the type you most use (item or summary)
- Use billing cycles attached to the recurring entry to evenly distribute the workload. For example if you bill all your customers on a monthly schedule, flag part of them to be billed on the 1st of the month, part on the second etc.
- Customize the finders in the AR screen to show you only the info that you need.

- If you have a large Customer master file or item file but many of the customers / items are inactive, set and save a “criteria” in the finders to show you only active records.
- Use Quick Mode (Settings menu in AR invoice entry screen) to determine which fields you want to copy from the existing entry or detail to new entries or details.
- Use Auto Clear (Settings menu in AR invoice screen and Receipts Entry) to have the system automatically go onto a new entry after adding an invoice or receipt
- Use Auto Apply in receipt entry to let Accounts Receivable apply the receipt to the oldest documents first.
- If you use optional fields on your AR transactions, set them up as Auto Insert with the default value as the most used value for the field. The system will automatically insert them and you just have to modify them when/if necessary.