This session will provide Apex users with a review of Apex Quote to Cash best practices. Learn tips and discuss new features for quoting, pricing material and freight, dispatch, ticketing, paying carriers, invoicing, and applying payments..

Quotes
- Creating quotes
- Material pricing options
- Freight pricing options
- Other charge/surcharge setup and pricing

Orders
- Changing quote to order

Ticketing
- Creating tickets
- Shortcut keystrokes
- Using order on ticket
- Using incomplete tickets
- End of day process

Editing/Posting Ticket
- Reports to run prior to posting
- Setting up exceptions
- Running exception report
- Editing tickets
- Using hold tickets
- Posting tickets
- Ticket history reports

Invoicing
- Invoice setup options
- Grouping Customers
- Excluding Customers
- etc.
- Invoice process
- Sales reports
- Credit/rebill process
- Reasons for corrections

Payments
- Payment setup options
- Making payments

End-of-Month Processing
- Recommended steps for end-of-month
- Effect of end-of-month processing