Sales Order Entry

One solution, part of a suite of Supply Chain applications

Reports

- Inquiry
  - Sales orders
  - Sales order status
  - Sales Order invc history
  - Sales Order cust history
  - Sales Order item history
- Codes
- (Open) Orders
  - Open orders report
  - Daily order report
  - Weekly order report
  - Open orders by cust
  - Open orders by item
  - Open orders by salesrep
  - Back orders by cust
  - Back orders by item
  - Drop-ship orders by cust
  - Drop-ship orders by item
- Automatic fill back orders
- History
- Margin history
- Item purchase
- Item not purchased
- Salesrep commission
- Royalties
- Custom reports
- Queued reports

Order Header

Order no	414	Order type	Order	Project M
Bill to	00000010 ...	Source		Div
Driftwood Arts Inc		Order date	2/04/2004	Dept
Suite 150		Required by	2/14/2004	Disc % .00
12345 First Street South		Expires on	2/14/2004	Price qty 10
New Portland ME 04961		Ship labels	N:none	FOB Orig
Confirm with	Tom Hamilton	EDI/RA/MAIL	1	Invoice 1004
Ship to	00000010 ...			
Driftwood Arts Inc		Location 001	TAH Warehouse	
Suite 150		Terms 001 ...	Due upon receipt	
12345 First Street South		Tax 001 ...	Achille	
New Portland ME 04961		Taxable	Taxable always	
Confirm to	Tom Hamilton	Sales Rep 001 ...	Salesman code 1	
Customer PO		Territory 001	Territory number 1	

Comments **Order Comme**

[Entries] [Ship]

Sales Order Lines

Seq	Item	Description	Quantity
1	32-777	#210 PREVUE SWING 10MM X 3"X 4	1.000
2	.8311	GOLD SNAIL LG.	1.000
3	32-77	#211 PREVUE SWING 10MM X 1"X 2	1.000
4	.9271	POMPOM HEAD ORANDA 5"	10.000
5			.000
6			.000
7			.000
8			.000

When a customer c... you need at your fing... shipping information ... established. Stock quantity is displayed if the quantity ordered is not available. Pricing is automatic from priorities set for your company and customer. Remarks, Extended description, item sales history, customer purchase history, and quantity checks are all available with hot key shortcuts during entry.

Counter orders provide an alternative and speedy form of entry when sales don't warrant picking and shipping the product from the warehouse. Reports for sales orders, confirmations, picking lists, and shipping labels are all standard menu selections but options create optimum flexibility. Invoicing is completed as you ship, at the end of the day, or a little bit of both.

Shipping interface to Federal Express® or UPS® can also be processed separately and direct with their respective systems from the Down To Earth Warehouse Management application. When installed on a single warehouse PC, the main system Sales Order exports data to be transferred to Warehouse. That file is loaded, processed for the most efficient packing/shipping, then sent back to the main DTE system for invoicing

When the Sales Order application is integrated with Purchase Order, Inventory, and Accounts Receivable, the complete suite becomes a powerful, easy to use, and effective tool for your business. Adding Bill of Materials and Contact Management applications simply adds more efficiency to the Supply Chain formula.

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Features

▪ Notations, Extended description, and Remarks	Special customer notations display for information and/or print on the invoice. Each item carries a 240 character extended description to include or type a custom extended description for the particular order. If you still need more room, individual remarks can print for warehouse picking, on the invoice, or both. Customer notations directly into Contact Management or Notes utility provide a written record of verbal contact with the customer.
▪ Recurring and Blanket orders	Up to nine different recurring order frequencies are available in addition to the choice to recreate an order from a posted invoice or open order.
▪ Personalized data processing	For easier data entry, choose to prompt for Sold to or Bill to first when entering an order. Select the printer from a list or automatically send to a specific printer. Use standard preprinted forms or have your own custom invoice. Scan the UPC code or enter the item. These are just a few choices available for peak efficiency.
▪ Sales Kits and components	Items sold as single level assemblies are grouped together as "Kits" for the sales order and exploded for warehouse picking.
▪ Scanner input	Some operators prefer a scanner, others prefer the keyboard. Both are acceptable and interchangeable forms of data entry.
▪ Item and Customer historical inquiries within entry	Historical data look ups are available not only in detailed inquiries but within order entry, as well. You can hot key to see history for a customer and item combination or for this customer and any item purchased.
▪ Serial / Lot tracking	Item serial/lot tracking can be a necessity and is tightly controlled within DTE for maintenance and historical purposes.
▪ Location and real time quantities	Company controls allow orders for items from multiple locations providing tighter inventory efficiency. Instant updating produce "real time" quantity status.
▪ Special pricing schemas	Five price levels provide schemas for different customer types in addition to special pricing categories by customer, category, location, territory, and item and discounts. You choose the pricing priorities or have DTE search for the lowest price.
▪ Date controls	Define an order Expiration and line Required by date for each order entered to use as filters in numerous reports and automatic processes.
▪ Shortcuts for efficiency	Throughout DTE, shortcuts make it easy to find information. Whether you're in order entry or item inquiry, details, history, pricing, and status are at your fingertips.
▪ Counter Orders get the job done quickly	Not all sales are for wholesale distribution, some are over the counter sales. DTE allows both types with condensed entry windows for the quick Counter processing.
▪ Warehouse interface	Installing the DTE Warehouse Management application enables packing and shipping in the most efficient manner possible. Order information is exported from the main system, massaged within Warehouse, connected with FedEx® or UPS® or other shipping, then transferred back to DTE for the final invoice.