



FACTS Data Sheet: Sales Orders

Sales Orders streamlines the entire order processing cycle and gives distributors the information they need to improve service and eliminate errors.

For a distributor, it all begins with the sale. Without critical information at your fingertips at all times, your company can't provide exceptional customer service. Without exceptional customer service, you can't remain competitive. Sales Orders provides the tools to empower distributors to offer top-notch customer service while managing the entire order cycle with ease.

With Sales Orders distributors can:

- Customize order entry screen layout to eliminate keystrokes and speed entry time
- Create new orders from past orders, open orders or quotes
- Sync Customer Inquiry and Item Inquiry views to Order Entry, allowing those views to "follow along" as you enter new customers and items
- Use non-stock item functionality to track special orders without congesting reports
- Commit backordered quantities automatically when goods are received, optionally giving rush orders priority
- Maintain customer-specific item numbers so quotes, pick tickets, and invoices will display the customer's preferred item number
- Associate customer deposits with an order and apply the deposit upon order confirmation
- Set up each customer with unique credit check rules, including credit limit, days grace and action taken when credit checks fail
- Mark an order to ship complete or certain lines to ship complete, cutting down freight costs
- Consult customer and notes for technical details, requirements or other information
- Create customer and item notes to automatically display while entering orders



focus on essentials

➔ INVOICES:

Process direct invoices;
Create credit memos with reason codes to easily identify return trends;
Create recurring invoices that will automatically post for a period of time based on total sales or number of invoices generated.

- Put orders on Service Hold to temporarily prevent them from printing in the warehouse
- Search for alternate warehouse stock levels if your primary warehouse is out of stock
- Report lost sales with reason codes for quick identification of the causes of lost opportunities
- Select a different price than the customer's default price by using the Price Search tool
- Determine an item price by entering the target gross margin
- Discount individual items or entire orders by a certain percent
- Create companion items to promote up-selling opportunities
- Create orders to ship from multiple warehouses, including direct from the vendor
- Use non-inventory items to charge for small orders or labor
- Suggest a purchase order or transfer for a backordered item
- Quickly review order exceptions for proactive customer service
- Use temporary items to sell one-time items
- Optionally assign each order to a truck rout

➔ KEY REPORTS:

Stock Status Report
Surplus Stock Report
Inventory Turns Report
Seasonal Item Report
Flagged Item Report

Quotes are often the first step in the order process. The easy-to-use quote programs allow the salesperson to convert entire quotes or only specific quote detail lines to sales orders upon customer approval and choose to create quotes for existing customers or new prospects.

Contract Pricing provides the ability to maintain special pricing for individual customers, customer price classes or all customers.

- Pricing can be set per item, item price class, primary vendor or for all items
- A contract may be set up using standard pricing, price levels or quantity break pricing
- A user definable hierarchy evaluates multiple applicable contracts to set default price
- Pricing information is displayed during order entry to allow the order taker to view pricing or select other pricing options

Counter Sales assists in a counter sale environment and offers time-saving functionality:

- Quickly create point-of-sale invoices and receipts
- Choose user-defined payment types to permit daily tracking of checks, credit cards, and cash tendered
- Multiple payment terms are supported on a single sale
- Utilize cash drawer reconciliation to maintain accurate cash tracking and balance discrepancies
- Automate credit card authorization through integration with First Data's IC Verify software

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