

Sales Order Processing



PowerShift sales order processing allows you to quickly accept customer orders for standard and make-to-order items. Orders can be accepted via an EDI process or be entered by an operator. Order line entry features Q-Info, the ability to configure and display user-specified information. Blanket orders can be quickly entered for a range of dates or for the same day of the month for any number of months. During line entry, availability can be checked and new manufacturing or purchase orders can be automatically created as required.

Inventory Status Inquiry | Customer Service Inquiry | Customer AR Activity | PowerShift / 00623 | Sales Order Maintenance | AR Transaction Inquiry

CA-1 | 4.0 WVI 102511 | RCE | OE2 | Sales Order Maintenance | 10/11/2012

Order number CA-100003271 C-10 - Natural Wood Furnishings Currency US

Line number

Item number

Qty open

Selling price

Sales UOM

Description

Date entered Line priority

Date wanted Non-commission?

Date promised Kitted item?

Expected ship Drop ship?

Adjusted promise Allow split lot?

Adj prom reason

Reason for chg

ECL Current

RRL

Discount %

-Quantities-

Original order 1

Outside supply 0

Supply released 0

Q-Info lets you specify additional data elements and other information you need to see

Configurable Q-Info Window

Color: GRN GREEN

Style: WM Womans

Matl: AL Aluminum

Size: LG Large

User: Kate's master

Slsm: Joanna Parsons

CSR:

All returns subject to return policy: Returns subject to a 25% restocking fee

For more item information:

View BCBI | Obligate | View image | Decl value | Audit | Cust item | Comm splits | Surcharges

OK | Cancel | Apply | Taxability | Copy/Blngt | Notes | User fields | Jump

Delete | Other info

Order Entry

- Display previous orders for a customer and item during order entry.
- One-step processing handles after-the-fact and over-the-counter sales.
- Orders received electronically are validated before transfer to sales orders. Drop file interface can be used to automate EDI processing.
- Customer deposits are tied to sales orders for easier tracking and reporting.
- PowerShift supports multiple ship-to addresses with two resale licenses each.
- Supports sales branches for "branding" purposes.

Line Item Entry

- Each operator can choose between standard and a quick entry mode. Qic-Entry is well-suited to multi-line orders, simply prompting for item, quantity & date wanted.
- PowerShift supports multiple sales units of measure, which can be different from the item's stocking and purchasing UOMs.
- Q-Info enables you to configure and display additional information.
- The pricing system automates your current plan, including contracts, specials, and volume discounts, and displays the selling price for each line.
- An operator can select specific serial or lot control numbers for an order.
- Configured product options display to guide their selection.
- Blanket orders can be entered for specific intervals or days of the month.
- An order entry operator can display components of an item covered by warranty and add replacements to a new sales order.

System-wide Features

- Standardized user interface is easy to learn; accepts point-and-click or keyboard input.
- Lookups speed record or order retrieval; sort the way you want and use the Restart or Find functions to locate the record you need.
- Each user can set and save sort and selection options for reports and inquiries, reducing the need for custom reports and programming.
- Output data to a printer, e-mail, fax, PDF, EDI, or Microsoft Excel.
- Information is accessible with pop-up windows, drill downs, and jumps to related programs, reducing the need to switch screens.
- The Data Dictionary supports ODBC, Report Generator, and QICLOOK™.
- F1 accesses online help for the program you are running.
- Security system allows users access to selected programs and accounts.

Standard Reports and Inquiries

Cost of Goods Sold Report
Open Order Line Report
Order Expedite Report
Order Release Listing
Order Date Revision
Order Volume Inquiry
Paid Sales Commission Listing
Price Lookup
Regional Sales by Product Subclass
RMA Listing
Sales Analysis by Month Report
Sales Analysis by Sales Region Report
Sales Analysis Report
Sales by Customer Report
Sales by Item by Customer Inquiry
Sales by Item Report
Sales by Item with Commission Split
Sales by Product Class Report
Sales by Rep Report
Sales Commission Inquiry & Listing
Sales Commission Inquiry by Rep
Sales Invoice Inquiry
Sales Order Approvals Inquiry
Sales Order Inquiry & Listing
Sales Order Line Inquiry
Sales Order Report
Sales Order Summary
Sales Quote Inquiry
Sales Rep Inquiry & Listing
Sales Rep Order Listing
Sales Unusual Usage Report
Top Customer Sales Report
Top Sales Regions Report
Warranty Tracking Inquiry
Year-to-date Sales Comparison

Document Management System

Output copies of these documents:

- Sales Order
- Order Acknowledgment
- Sales Quote Acknowledgment

Executive Information Summary

Displays:

- Gross and net sales
- Margin on sales
- Open sales (not invoiced)
- Credits issued
- Orders on hold
- Cancelled orders
- Order discounts
- Net sales returns
- Sales quotes entered, open, and converted to orders
- EDI orders



Item Availability

- A sales order line can be filled from multiple locations, including drop shipping from your vendor or another branch directly to the customer.
- When Available to Promise is exceeded, an alert can advise the order entry operator of scheduling problems or restrict order entry.
- Substitute items can be shipped when an ordered item is not available and the customer accepts substitutes.
- A requisition, purchase order, manufacturing order, or transfer that provides supply is tied to a sales order for easier tracking.

Order Holds

- Orders that exceed the customer's credit or order limit are placed on hold; orders can be manually placed on hold for a non-credit reason.

Dates

- Sales and shipping are not limited to shop calendar dates.
- Dates on some or all order lines can be adjusted quickly by a number of days (plus or minus), to a specific date, or from one date to another.
- Dates for multiple sales orders can be changed in mass based on user-defined selection criteria.

Surcharges

- Surcharges can be assigned to an item, item group, or customer group.
- PowerShift calculates surcharges based on a percentage of the item's unit price or cost and/or a set amount per quantity ordered or the item's weight.
- Surcharges can be displayed and adjusted during order line entry.

Document Management

- PowerShift can output multiple copies of the documents you want, using each recipient's preferred method (e-mail, fax, EDI)—automatically or on demand.
- Output certificates of compliance for a selected item.
- Customer item numbers can be printed on sales documents; item descriptions can be printed in the customer's language.
- An Internal document flag can be set to limit the distribution of documents associated with an order.

Commissions

- PowerShift can calculate a percentage of the sales order total or line total, with the option to exclude discounts and other charges.
- Commissions can be paid to up to four sales reps, managers, and support persons assigned by customer type, item type, specific customer, or item.
- Accounts payable can process commission payments; alternatively you can output a file for your payroll system or process manual checks.

Sales Quotes

- Sales quotations can be created with all of the same details as a sales order.
- Quote creation allows viewing of margins to ensure profitability.
- Upon completion of the entry you have a dollarized quote that can be sent to the customer for approval.
- Once accepted, quote information can be quickly transferred to a sales order.

History

- PowerShift maintains a full audit trail of each transaction with date, time, and user.
- Reports can access the closed orders you move from active files to history.
- Create sales history analysis reports that focus on the factors you want.
- You can inquire by specific serial number to check warranty/service agreement expiration and launch an RMA.