



# Sales Order Processing and Invoicing

The Sales Order Processing and Invoicing module handles all aspects of the sales order processing cycle from the entry of orders through picking and delivery to invoicing

## Key Features at a Glance

- Supports full order life-cycle
- Includes an extensive range of discount types
- Wide range of pricing models
- Can take full advantage of Active Intelligence™
- Customer's own product catalogue

## Benefits

- Enables effective and efficient order management
- Helps sales people to remain in control of each sales opportunity
- Supports up-sell and cross-sell to maximise the margin in each sale
- Can reduce stress for sales people

## Flexibility

The flexibility of the Sales Order Processing system provides a large variety of different discount & pricing strategies to be invoked at order entry and multiple enquiry facilities are provided together with effective and efficient order taking.

A variety of order types including scheduled, repeating, back-to-back, direct and call-off are available as standard.

Invoicing enables the entry of invoices and credit notes for non-stock products or for items already picked – these facilities are also available from within Sales Order Processing.

The combination of comprehensive order entry, enquiry facilities and batch traceability provide conformance with ISO9000 standards.

## Sales Order Entry

The OneOffice Sales Order Entry module is designed to support a high volume, 'low-touch', complex distribution environment.

The extensive functionality includes support for:

- Scheduled, repeating, back-to-back, direct drawdown, calloff and master orders
- Quotations can be converted into orders or vice versa
- Individual products may require additional authorisations if price varies.

- Authorisation may be conducted via Electronic Mail
- Powerful facilities including flexible entry sequence, sales diary and contact history records
- Automatic accessory selection
- Alpha look-ups by partial field on name, address, postcode, product name, product group and specific code
- Copy previous order to create a new order or credit note
- Product selection from search, price list, catalogue, previous orders, assembly or accessories
- Ability to reserve stock against an existing purchase order, works order or requisition
- Call off orders
- Automatic reservation of stock, purchase orders or requisitions
- Order priority for stock allocation
- Facilities for controlling sales teams
- Cash sales and trade counter operations
- Option to reserve, automatically, batches or serial numbers before picking
- Profit margin check on each order line
- Sophisticated credit checking including outstanding orders, overdue invoices and group account balances with automatic re-evaluation



- Credit lines on orders
- Ability to hold and release orders
- Flexible exchange rate handling allowing override of system rate if authorised
- At delivery, items not delivered can be back ordered, substituted, cancelled or left for later delivery
- Sales Order may be costed to an individual contract within Contract Costing module
- Delivery scheduling by van area
- Contract budget may be raised automatically from quote or order

available including:

- Facility to create a new account when entering an order
- Divisional handling
- The Non Stocked Assembly feature allows a product code and special price to be given to a set of items normally sold together.
- Components are printed separately on the picking list or delivery note, and costed separately
- Customer's own product catalogue with codes and descriptions
- Option for combined delivery notes and invoices
- Facility to allocate stock from alternative locations, if authorised
- Records EC sales details

## Maintenance Facilities

To maximise the day-to-day use of Sales Order Entry a full range of tools are

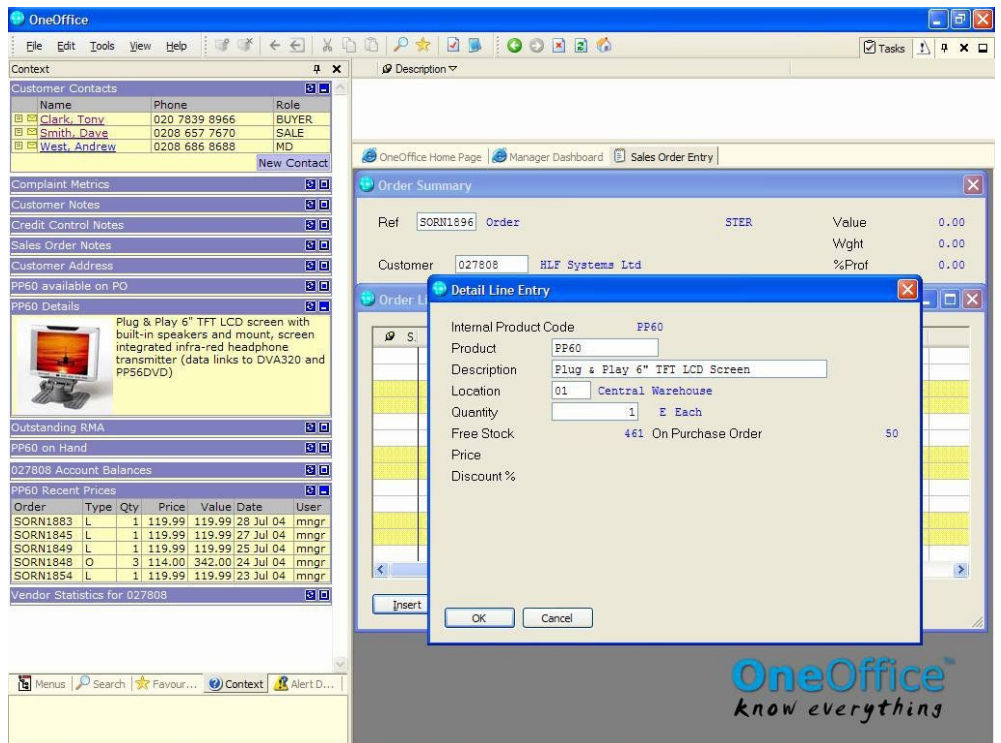


Figure 1. Using Active Intelligence™ alongside Sales Order Processing helps users to get more out of each opportunity. For example here a sales person is starting to enter an order for a 'PP60' and is being shown product information, the price the customer recently paid, stock on hand and information about the customer relationship.



- Extended product description
- Record carrier details against shipments
- Provision of Certificates of Conformance
- Analysis of outstanding quotations
- Analysis of order on hold for each credit controller with access to sophisticated control and release facilities.

## Discounts

Extensive range of price and discounting options are available including:

- special price deals
- special discounts
- flat rate discounts

- total pack pricing
- split pack surcharge
- whole pack discount

Special discounts are supported by order value, order points and by product group over several order lines

## Pricing

A wide range of pricing models and scenarios are available, including:

- Special offers by location or customer group or reminder messages when products are ordered
- Cost-plus pricing
- VAT inclusive pricing option
- Multi-currency operation with foreign currency price list, foreign language descriptions and orders

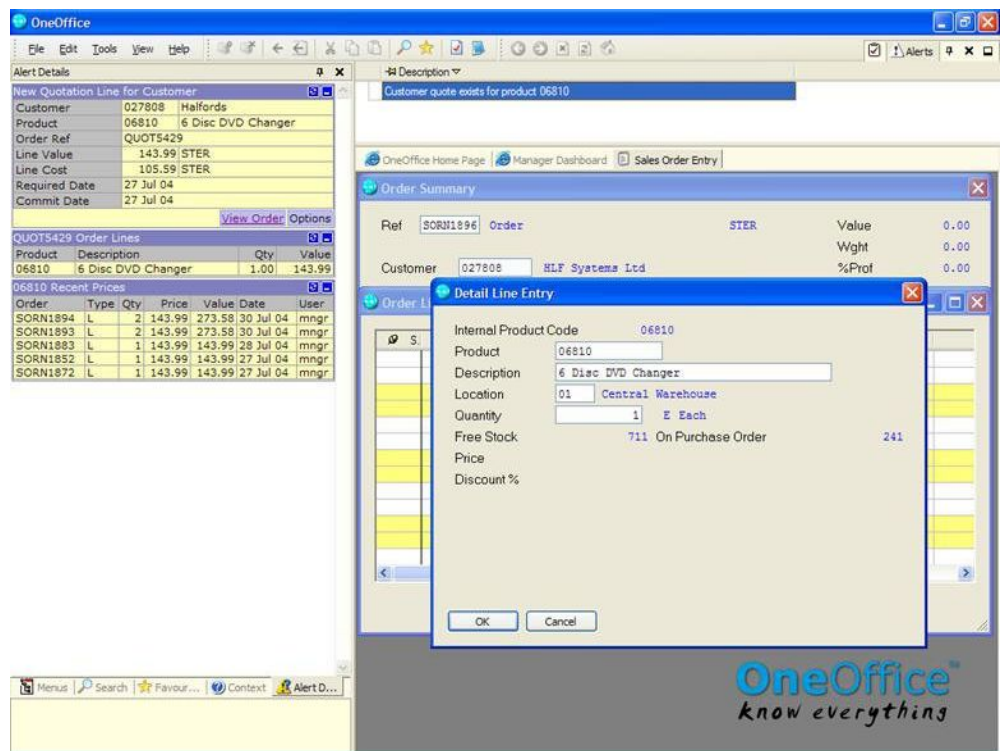


Figure 2. In this example, Sales Order Processing is used with Active Intelligence™ and event management. As the user starts to enter an order, OneOffice uses a set of customisable dashboards to tell them that a quote already exists for the customer and also provides information about recent prices the customer paid.



- Re-pricing for fluctuations in currency

## Reporting

To maximise every sales and margin opportunity Sales Order Processing (SOP) is supported by the powerful reporting capability in OneOffice. As well as supporting ad-hoc reporting and the creation of reports tailored to your specific requirements, SOP includes an extensive range of standard reports such as:

- Batch traceability with facility to trace between orders and batches
- Outstanding Order reports with a wide range of selection criteria: status; type; customer; delivery address; rep; area; customer class; product; delivery date; order number
- Order Acknowledgements selectable by customer

- Bulk Picking Lists by product, location and bin number
- Lost orders Analysis
- New Order Register
- Override Audit report - price, credit limit, discount, etc.
- Profit Margin Report
- Available stock against back orders report.
- INTRASTAT reports
- Analysis of lost sales, returns and picking failures

## On-Screen Enquiries

On-Screen Enquiries provide access to current information as and when required. This on-hand, current information is important to support decisions that need

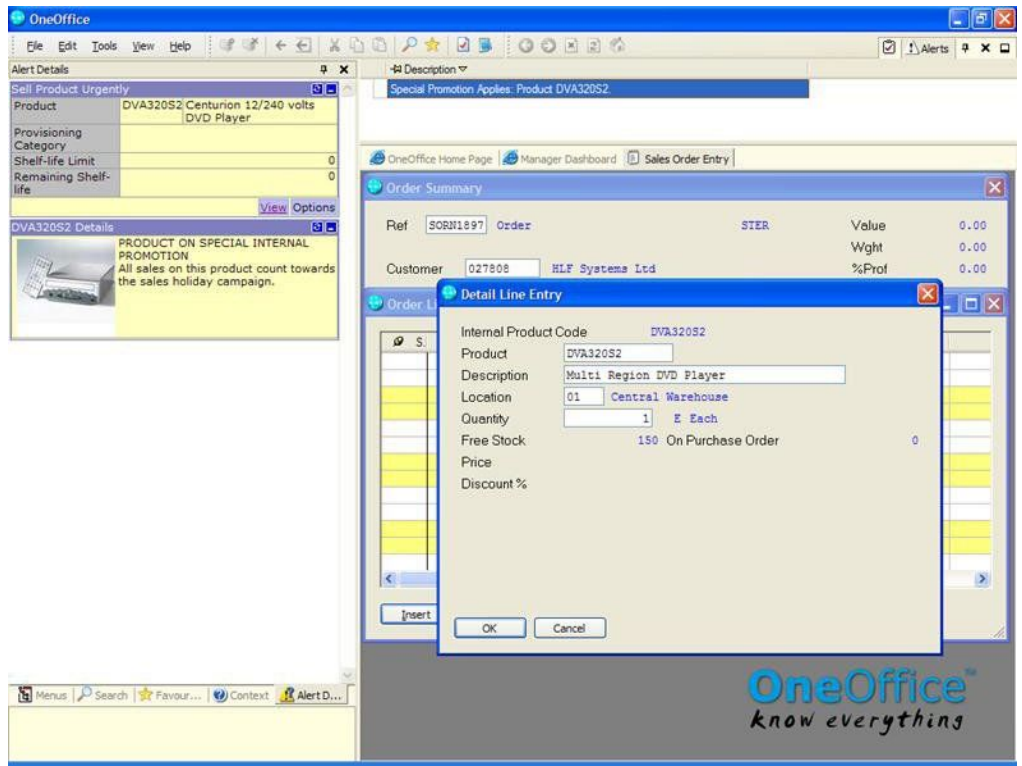


Figure 3. On this occasion, as the user started to enter an order OneOffice Active Intelligence™ has told them about a special promotion that is available on the product.



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to be taken on a minute-by-minute basis outside the routine reporting cycle. This capability includes:

- Multiple enquiries within order entry
- Historical order enquiries
- Multiple enquiry facilities available at any point during order entry include:
  - Viewing previous orders for the product/customer
  - Stock enquiries
  - Purchase order
  - Works orders
  - Special price
  - Deals display
  - Customer statistics
  - Orders on credit hold

### **Active Intelligence™**

One of the key benefits of supporting both the front office and the back office using OneOffice is the ability to use Active Intelligence to deliver information to individual users based on the context activity they are currently working on. This means that if a user is entering an order you can give them additional information when it could enable them to deliver better service, retain more margin or both. For example, if a user is raising a quote they can be told if a similar quote exists for that product/customer combination; they can be told if any special offers are available to the customer or if a particular product is on a push list. This capability uses the OneOffice Supply Chain Event Management components, along with WorkSpace and Dashboards. Together these combine to ensure that your people have the opportunity to turn more enquiries into orders, at a higher margin while delivering a high level of service to your customers.



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