

ASI-Order Entry/Invoicing module

Designed after the Solomon IV 206 Order Processing with enhancements

Capabilities:

- ✓ Simplified, robust, quick and easy data entry with built-in workflow processing option.
- ✓ Integrates with Inventory.
- ✓ No-Inventory integration option;
Product (sales code) maintenance enabled.
- ✓ Track releases for all order types.
- ✓ Retrieve valuable information about the order/invoice components with ease.

Order Entry (X5.ASI.02) **** Customer is on Admin. Hold ****

Order Nbr: 456667 Order Type: Regular Order Standard Order: Cust ID: CT0100 Status: Invoice Per Closed: - Order Date: 12/30/2002

Cust Order Nbr: Our PoNbr: Sales Person ID: MN Commission Pct: 5.50

Line Items Billing Information Shipping Information Invoice Information Invoice History

Details (F4 for Grid/Form View)

Open Line	Inventory ID	Description	Site ID	W
1 True	HON-672L-L	HON 600 Series Wide Lateral Two Drawer File Cabinet	LA	02B
2 True	HON-672L-Q	HON 600 Series Wide Lateral Two Drawer File Cabinet	LA	02B
3 True	HON-672L-S	HON 600 Series Wide Lateral Two Drawer File Cabinet	LA	02B
4 True	HON-673L-P	HON 600 Series Wide Lateral Three Drawer File Cabinet	LA	02B
5				
6				
7				
8				
9				
10				

Tax Detail... Order Line Total: 8860.50 Remaining Line Total: 7717.24 Invoice Line Total: 0.00

Quick Pay Activity Report Credit Report 10537.30 Invoice Total: 0.00

ASI-Order Entry/Invoicing

Features

System Implementation

Options: (Setup)

Customize the sales function, including order process, default options, display options and more.

- ✓ Configure the Order Entry/Invoicing module to meet your company's specific needs.
- ✓ Select default order type and status to begin the Order Entry/Invoicing process.
- ✓ Setup Order status progression for the order entry/invoicing process.
- ✓ Default sales account and sub-account source for the product/inventory items.
- ✓ Select if back-order capability will be utilized.
- ✓ Configure field presentation on the entry screen; account, sub-account, detail commission information, work order information, specific ID field and item cost field.
- ✓ System option able to change customer ID on an open order.
- ✓ Allows order activity to release to AR in detail or summary.
- ✓ Module Integration; Accounts Receivable, Inventory, Project Controller and Purchasing.

Order Entry/Invoicing:

Simplified, robust, quick and easy data entry with built in workflow processing.

- ✓ Billing information defaults from customer.
- ✓ Ship-to information selection.
- ✓ Record comments / notes for the order and order items.
- ✓ Print styles by line item for flexible invoice presentation.
- ✓ All available fields move to AR including user defined fields upon invoice update.

- ✓ Invoice History tab enables review of invoices released against the order or all invoices of the customer.
- ✓ Reprint prior processed invoices.
- ✓ Ship complete option.
- ✓ Safeguards releasing unsuspected problem orders.

Inventory and Customer Information:

Easily retrieve valuable information about order / invoice components.

- ✓ Features Activity flash Report.
- ✓ Provides Customer Credit information on the fly.
- ✓ Offers On-hand qty, on-sales order, inventory allocated in (F3) search.

Pricing:

Streamline the pricing structure with flexible tools for maximum profitability and efficiency.

- ✓ Define flexible unit pricing based on a combination of the item, item and customer, item and customer class and quantity ordered.
- ✓ Originate and maintain separate price lists and trade discount percentages for individual customers.
- ✓ Automatically calculates and applies trade discounts, payment terms discount and sales tax to the order.

Blanket/Standard/Recurring Orders:

Provides easy creation and maintenance of blanket, standard and recurring orders for efficient order entry.

- ✓ Create blanket, standard and recurring orders.
- ✓ Generate an order / invoice from a standard order selecting customer at time of creation.
- ✓ Track releases against blanket / recurring orders and creation by standard order.

Order Entry Processing (Integrated with Inventory)

Maximize order workflow efficiency with sales order tools to satisfy customer requirements.

- ✓ Create orders for the sale and tracking of inventory items.
- ✓ View inventory item on-hand quantities, quantities on orders and allocated quantities.
- ✓ Simplified step by step of order progression defined by company.
- ✓ Activity flash report presents overview of inventory item.
- ✓ Customer credit information available to note customer compliance to company terms and conditions.
- ✓ Tracks releases against all order types.
- ✓ Warns about insufficient inventory to fill shipment.
- ✓ Create order from multiple inventory locations.
- ✓ Allows over-shipments.

Invoice Processing (No Inventory Integration)

Create invoices with ease using our product list of sales codes and description lines for invoice flexibility

- ✓ Create invoices for the sales and tracking of product items.
- ✓ Select product (sales) codes defined by your company.
- ✓ Simplified step by step of invoice progression defined by company.
- ✓ Tracks releases against all order types.
- ✓ Customer credit information available to note customer compliance to company terms and conditions.
- ✓ Print styles by line item for flexible invoice presentation.

Additional add-on capabilities:

Enhance the ASI-Order Entry/Invoicing module with comprehensive tools to further increase capabilities of the order entry experience.

- ✓ Auto PO Generation; (OPtoPOtoOP).
- ✓ Inventory Allocator.