SALES ORDER

Order entry; picking, tracking, billing . . . and beyond

The success of your business depends on keeping your customers happy. You need to promptly fill their orders and answer their questions. You need to be able to handle picking, packing, shipping and tracking. The OPEN SYSTEMS® Accounting Software (OSAS®) Sales Order application gives you the means to do that. You'll also benefit from efficient billing and cash receipts management.

You'll keep your customers happy by filling their orders promptly and you won't lose track of commitments you made or terms you agreed upon. Backorder information is right at your fingertips. You know exactly what's backordered and when it will ship.

Make an entry once and the system will produce a picking slip, an invoice, and a backorder if needed. And with the recurring orders feature, you'll never have to re-enter standing orders or scheduled shipment orders. System defaults and quick entry make transaction entry fast and efficient.

Sales order entry offers a full range of data fields. You may choose to use only those fields required by your business.

OSAS Sales Order Offers Choices and Flexibility With These Key Features

❑ You can produce picking slips for your warehouse employees. It will tell them which items to ship from stock. You can also send one with the order as a packing slip, or use it to verify quantities shipped and/or backordered. If you should have a printing problem such as a paper jam, you can reprint affected picking slips.

❑ Describe services rendered on custom-made products by referencing additional line-item descriptions of up to ten lines. This is especially helpful to service and build-to-order businesses.

❑ You'll be able to analyze sales trends and compare the current period's sales performance with that of previous periods by looking at the summary and detail history.

❑ Produce a professional quote for a client and convert that quote to an order upon client approval. All you have to do is change the status of the order from "quote" to "new".

❑ You'll save time with online printing functions. You can print invoices and picking slips immediately after entering an order, or accumulate them into batches. Use your choice: plain paper or two special form sizes.

❑ You'll have full control of your pricing. A price matrix allows you to set prices by a combination of customer codes and/or inventory codes. Define pricing as a discount from list or as a markup from cost. Prices can be set by customer level for each item for columnar pricing. Prices can be set for a specific customer or group of customers for a group of items. Almost any combination of pricing is available; you decide which works best for you.

❑ You won't need to leave the order entry screen to add a new customer. Master file maintenance is just a keystroke away.

❑ Save data entry time by using the recurring orders feature when you process your billings. If a customer places the same order each month, you only need to enter the information the first time.

❑ Your order entry is easy and efficient with quick entry and defaults on headers.

❑ Multiple warehouses per order let you sell items from any warehouse that has available inventory. Selecting the warehouse closest to the customer can save on shipping costs. Also, the customer will receive one invoice regardless of how many warehouses were used to fill the order. This saves time and paper.

❑ Offer special promotional pricing by letting OSAS track those promotions for you. Promotional pricing can be in addition to or instead of other discounts. A full screen of selection criteria allows you to customize your promotions. When the promotion is over, normal pricing will resume.

❑ Eliminate "down time" with batch processing. Your order entry staff can enter orders under one batch ID while another batch of orders is being processed and posted.

❑ You can enter or edit invoices and credit memos and view invoices with transaction processing from a single menu.

❑ The optional packing list form reflects the quantity ordered, shipped, and backordered without prices. You can choose whether to print kit detail on your packing list.

❑ If you misquote someone by omitting tax, you don't need to worry about the invoice not matching the quote. You can adjust the Tax field on the totals screen so that you can absorb the cost difference.

❑ You'll be able to assign lot numbers for tracking sales and calculating costs. Identify which customers made purchases from a specific lot and when they were shipped.

❑ You have the flexibility to sort by general ledger period or sales account in the Sales and Miscellaneous Credits Journals.

❑ The Blanket Orders capability allows you to have a large, contracted order with your customer whereby the shipments are scheduled, or an order is standing for a set dollar amount or quantity. This saves time since you won't have to enter an order each time.

❑ You can print a Bill of Lading, a legal shipping document that is required by law for the transportation of certain types of freight.

Sales Order Reports

Open Order Report
Recurring Order List
Backorder Allocation Report

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