

INFIMACS II® Data Sheet

Integrated Financial and Manufacturing Control System

Sales Order Management

FUNCTIONS

- Billing/Invoicing
- Shipping
- Sales Analysis
- Commission Reporting
- User-definable Fields and Programs

FEATURES

Customer Control

- Customer Account Inquiry by Partial Name or Number
- Customer Class Codes
- User-defined FOB, Freight Charges, Carrier Tables
- Multiple Ship-To for Each Bill-To Address
- Customer Discounts
- Price Level Specification (Tiered Pricing)
- Integrates with Customer Resource Planning (CRM)

Product Control

- Product Commodity Code Defaults
- Multiple Product Types
- Model Configurator (*Optional*)
- Lot/Serial Control (*Optional*)
- Product Commission Control
- Product Class Codes

Product Price Control

- Pricing Flexibility
- Customer/Product Quantity Price-Breaks
- Customer Class/Commodity Code Pricing
- Contract Pricing
- Price Override

Sales Order Tracking

- Customized Sales Order Descriptions
- Sales Order Standard Notes
- Ship-To Addresses Override Per Order Line
- Sales Order Confirmation
- Sales Order Line Allocation
- Automatic Material Allocation Option
- Allocation Reversal
- On-line Product Shortages
- On-line Open Order Inquiry
- On-line Item Requirements Analysis
- Default Ship-From Location
- Distribution from Multiple Locations
- Partial Shipments
- Shipment Reversal
- Shipment Entry without Immediate Invoicing
- Quick Ship
- Credit and Debit Memos
- Packing Slip Adjustments
- Sales Commission Splits by Customer
- Multiple Sales Commission Flexibility

Shipment History

- Closed Sales Order Purge
- Order Transaction History

Customer Payments

- Invoice Approval/Reversal
- Invoice Print
- Partial Invoicing
- Sales Tax Computation
- Prepayment Invoices
- Invoicing History

REPORTS

- Customers
- Customer Credit
- Products
- Product Bill of Material
- Product Price List
- Product Price Breaks
- Customer Price Breaks
- Open Orders
- Sales Order Confirmation
- Sales Order Backlog
- Customer Orders
- Customer Order Backlog
- Customer Order Audit
- Product Delivery Schedule
- Product Shortages
- Shipments/Invoices
- Invoice Batch Review
- Credit/Debit Memos
- Invoiced Dollar Amount by Day
- Project/Order History
- Shipments Summary
- Candidates for Shipment
- Sales Order Shipments
- Product Shipments Summary
- Actual vs. Scheduled Ship Dates
- Bookings/Shipments Summary
- Sales History by Salesman, Customer, Product, Customer Order
- Salesperson Margin
- Salesperson/Customer Class
- Product Margin
- Product/Commodity Code
- Product/Salesperson by Customer
- Customer Class Code
- Ship-To State
- Sales Commissions

Sales Order Management

SUMMARY

INFIMACS II Sales Order Management provides for the input and tracking of customer orders. The module collects and maintains both product- and customer-related data for the entire sales order cycle, from initial order entry through shipping and invoicing. Sales Order Management has been designed to optimize the customer service representative's time by making information easily accessible for decision-making. The INFIMACS II Customer Resource Management (CRM) module extends functionality to customer and order records.

To facilitate the order entry process, information on established customers, such as credit status and default order parameters, can be reviewed on-line. Account discrepancies can be identified by accessing history and open receivables at the same time. To minimize your company's investment in accounts receivable and improve cash flow, customers who exceed their credit limit may be put on hold and have their shipments suspended until the credit hold is released.

INFIMACS II Sales Order Management is designed to accommodate diverse product,

pricing, and commission strategies. Products can be stock items, configured products made of two or more stock products, or non-inventory products such as labor and services. As sales orders are entered, each line item is automatically priced based on pricing tables maintained within the system. These price lists reflect company pricing policies and can incorporate quantity discounts, pricing by customer type (e.g. wholesale or retail), and/or customer specific pricing. Multiple sales people can be associated with each order. Default commission splits are entered on the customer master file, but can also be specified on an order by order basis. Furthermore, commissions can be paid on receipt of order, invoice, receipt of payment, or a combination of the three.

At the time an order is entered, a real-time requirement can be made available to the inventory planner and master scheduler to ensure as much manufacturing lead time as possible for each order. Information on product availability can be displayed on-line, enabling quick and accurate feedback to the customer.

Sales Order Management maintains and processes back orders and partial shipments. As each shipment is made against a sales

order, the information for invoicing is automatically generated and held for accounting review prior to printing. This provides an opportunity to change or update information which may not have been accurate or complete at the time of shipment, thereby minimizing the need to print multiple invoices for an order.

Throughout the life of a sales order, INFIMACS II Sales Order Management prepares all of the documentation the company requires, including acknowledgments, pick lists, packing slips, and invoices. INFIMACS II also provides full support for "paperless" systems. You can even designate your own data and programs with user-maintained screen and field names for full flexibility.

INFIMACS II Sales Order Management maintains all required information for managing customer orders. Using this data, it provides very powerful sales analysis and reporting capabilities on product sales and customer buying trends. This module also supports manufacturing planning through immediate order updates to the material requirements plan.