

SYSTEM OVERVIEW

The primary purpose of an Order Entry system is to track customer orders from the time of initial order placement through the completion of those orders. The scheduling of "work orders" may be processed as well. The **Infinity POWER Sales Order Entry** module expands upon this primary purpose to provide a very sophisticated on-line proposal and work order processing system. It allows complete backorder processing and analysis, as well as complete invoicing and billing capability.

INTERNET BASED CUSTOMER SERVICE

When the **Sales Order Entry** module is utilized as part of an **electronic commerce** implementation, the possibilities for customer service and cost savings skyrocket. By utilizing the **Infinity COMMERCE** features included in each **System Administrator** module (**POWERServer**), sales order data becomes immediately available to your customers. Why spend more money having them tie up your **800** phone lines checking the status of their orders when they can look it up from the **Internet**, seven days a week, **24** hours a day at their convenience instead?

Send **e-mails** each time an order is received for their confirmation and when it's shipped to your customer. Keeping customers informed is the best way to provide them the highest level of customer service. Letting them know the backorder status of items they need now allows them to convert their orders to products you have in stock today! They'll keep coming back to those firms who truly understand this concept.

INTEGRATION A MUST!

The **Sales Order Entry** module requires the **Accounts Receivable** module to operate. Combined with integration to the **Inventory Management** module, the system provides complete on-line update of inventory commitment and customer credit line information.

SCHEDULING WORK ORDERS

Essential to part of cost accounting is the ability to tie in the scheduling of work orders. Everything done in firms using Job Costing does not necessarily require direct project tracking or manufacturing analysis. Much of the work may be in the form of service orders or work orders. Work orders may be added to the **Job Cost Main Module** from those sales orders coded as a proposal where the system will automatically add the job and set up the billing and cost budgets for all items so that they may be tracked throughout their processing cycle through the point of invoicing the customer.

DETAILED DESCRIPTIONS

In addition to the specification of all inventory items to be used on each order, detailed lines of text information may be added (**up to 450 lines**). This text may describe problems, solutions, or whatever information is needed to complete the order. All of this information is carried throughout the system, including all backlog reports, which may include the additional services to be performed.

ON-LINE INQUIRIES QUICK ADDS & CHANGES

The system is truly designed for on-line order processing. This means that inquiries for Orders, Customer Accounts, and Inventory items are one click away. Likewise, so is the ability to add or change customers and inventory items "on the fly" without leaving the order entry options.

SCHEDULED SHIPMENTS

Shipments may be scheduled for specific days with management reports showing order status. Additionally, a "stock requirements" aging based on current orders and stock is available.

BATCH INVOICING

The **Sales Order Entry** module does invoicing in a "batch" mode. Therefore, as work orders are returned from the field or the sales order floor, all additional information may be added prior to the final generation of an "invoice." Plus, portions of an order may be invoiced as work is completed and not held up until all work has been finalized. As customers are invoiced, all inventory items will be removed from stock and all affected customer accounts will be automatically updated in the Accounts Receivable module.

PURCHASE ORDER FLOW

Unique to the **Sales Order Entry** module is its integration with the **Purchase Order Entry** module. By using "Special Orders" or "Drop Shipments," the system can automatically send all of the necessary information to generate purchase orders for items ordered. This is key in businesses where little, if any, inventory is actually warehoused or stocked.

AUTOMATIC MARGIN CALCULATIONS

One of the benefits of using the "proposal" type of sales order is that it can be used on-line in making proposals to customers. Best of all, once the proposal has been created, one keystroke will show the profitability for an individual item or for the total sale. This provides the on-line tool necessary to help close business fast!

ORDERS PRINTED ON-LINE

Orders may be printed as many times as needed. This is convenient for personnel going into the field to fulfill the work specified to be completed. "Techs" and "Sales Reps" have the ability to describe the work that has been done and add the use of any additional parts. If you deploy our **DP/DashBoard** product, then staff have instant access to Sales Orders through their favorite Laptop, Tablet or Smartphone device in the field!

ONE-STEP INVOICING/MANUFACTURING

Although orders can be partially shipped, the system also provides an advanced feature that will record the shipment of all items on an order and generate the invoice automatically. For those businesses where most orders are always shipped complete, this is a real time saver, including automatic manufacturing of those items with Bill of Materials, if desired.

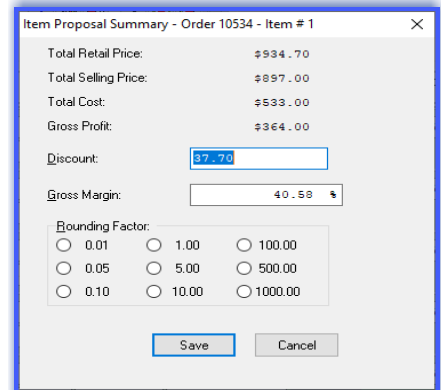
INTEGRATED MANIFEST SYSTEMS

Third party products such as the **UPS WorldShip** and **FedEx Ship Manager** integrate their tracking systems with the **Sales Order Entry** module.

Reports

- Sales Orders/Duplicate Orders
- Proposals
- Invoices
- Packing Lists
- Picking Ticket Report
- Shipping Logs
- Bills of Lading (**Shipping Document**)
- Shipping Labels
- Order Status Report
- Backlog Report (**Summary or Detailed**)
- Sales Order Booking Report
- Stock Requirements Aging
- Backlog by Single Inventory Item
- Complete Inventory Backlog
- Manufacturing Worksheet
- Manufacturing Status Report
- Bill of Materials Report
- Projected Materials Usage Report
- Order Analysis Report

Go to next page for List of Features



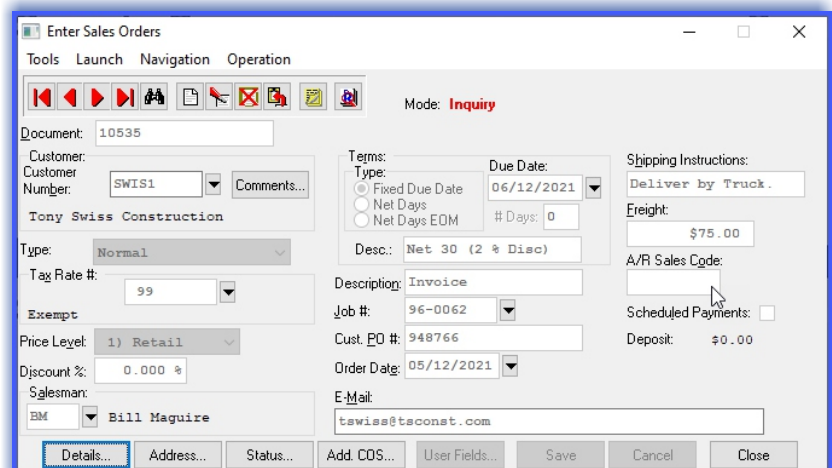
Item Proposal Summary - Order 10534 - Item # 1

Total Retail Price:	\$934.70
Total Selling Price:	\$897.00
Total Cost:	\$533.00
Gross Profit:	\$364.00
Discount:	37.70
Gross Margin:	40.58

Bounding Factor:
 0.01 1.00 100.00
 0.05 5.00 500.00
 0.10 10.00 1000.00

Save Cancel

Using Data Pro's exclusive **POWERServer** utility, through **DP/AUTO** scripts, these products can calculate all freight charges, generate tracking numbers and more to feed all of this information directly to the **Sales Order Entry** module. That way, all of this information is on each invoice and available for tracking on vendor web sites with automatic notifications sent to customers.



Enter Sales Orders

Tools Launch Navigation Operation

Mode: Inquiry

Document: 10535

Customer: SWIS1
Tony Swiss Construction

Type: Normal
Tax Rate #: 99
Exempt
Price Level: 1) Retail
Discount %: 0.000 %
Salesman: Bill Maguire

Terms: Fixed Due Date
Due Date: 06/12/2021
Days: 0
Desc.: Net 30 (2 % Disc)

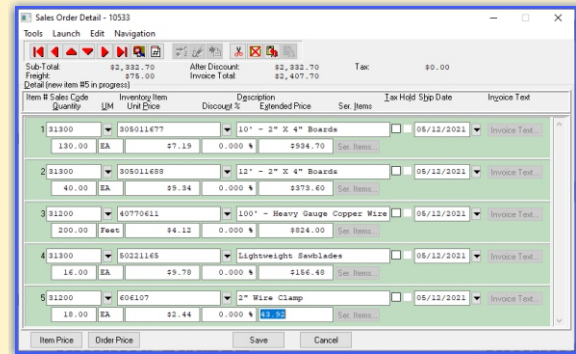
Shipping Instructions: Deliver by Truck.
Freight: \$75.00
A/R Sales Code:
Scheduled Payments:
Deposit: \$0.00

Description: Invoice
Job #: 96-0062
Cust. PO #: 948766
Order Date: 05/12/2021
E-Mail: tswiss@taconst.com

Details... Address... Status... Add COS... User Fields... Save Cancel Close

Module Features

- Batch Order Processing, Invoicing, and Back Order Tracking.
- Ten (10) Character Order Number (*alpha/numeric*).
- Assign Order Number or Use Auto-Numbering Feature.
- Supports these Transactions: **Normal, Special, Drop Shipment, Auto-Cancel Orders and Return Authorizations (RMA)**.
- Complete Proposal Writing Capability with full access to all customers/inventory items.
- Up to **450** Detail Lines per Order.
- Special **“text”** Sales Code allows users to enter up to ten (10) lines of free-form text on sales orders anywhere during order entry which will be printed on the sales order and/or invoice form. This can include multiple instances within the same sales order and/or invoice. Additionally, predefined versions may be saved in advance for repetitive use (*i.e. warranty statements, guarantees, promotional offers and much more.*) This information is also stored in a special detail file for future printing and access on demand.
- Provides a Proposal Summary capability for each individual sales order line item or for the entire order to calculate discounts and profitability.
- Selectable Preprinted Order, Invoice, Packing List and Bill of Lading Forms.
- Proposals may be Generated, Stored and later Converted directly to Sales Orders without any re-keying of data.
- Retrieval of Orders by Order Number, Customer Number, Customer Name, Customer's PO Number and User Defined Indexes.
- Allows for **“Importing”** of Orders from other systems.
- The Sales Order Import option allows auto-numbering of imported orders.
- Allows for the Changing of Items during Order Entry.
- Checks for duplicate Customer PO Numbers by Customers.
- On-Line Add an Inventory Item (*Quick Add*).
- Change an Inventory Item (*Quick Change*).
- On-Line Add of a Customer (*Quick Add*).
- Change a Customer (*Quick Change*).
- Customer Transaction Inquiry.
- Add new **“Ship-To Addresses”** by customer while in Sales Order Entry mode.
- Line item Ship Dates on **“Backorder Report”** prints Picking Ticket Report by bin number order for Warehouse Order Filling.
- Allows Scheduling of Payments (*Up to 360 Payments per Invoice*).
- Inventory Integration Allows Commitment of Ordered (*but not shipped*) Items as well as Withdrawals.
- Allows Review of Committed Inventory Items during Order Entry Process.
- On-Line Customer Inquiry (*Shows “Billing” Information, Open Items, Customer Aging and YTD Sales*).
- On-Line Inventory Item Inquiry (*Shows Pricing, All Quantities, Costs*).
- On-Line Order Inquiry (*Shows Backlog Status with Detail*).
- One Step Invoicing option (*Records Shipments for Inventory Items and Invoices Customers in one step*).
- The **“One-Step Invoicing”** option prompts users for a **“ship through”** date so only those orders scheduled to ship on or before the date entered will be invoiced.
- Ability to choose **“Alternate Inventory Item”** during Invoice Writing Option.
- Tracks Weight, # of Boxes and Freight by Shipment.
- Integrates with **UPS WorldShip** and **FedEx Ship Manager** software systems. Requires a commercial account with **“UPS and/or FedEx.”** Passes Customer Shipping Addresses, number of boxes and weight and more directly to **UPS** or **FedEx** products in real time using **DP/AUTO** Scripts. The **DP/AUTO** scripts can then update the **Sales Order Entry** module with actual freight updates of actual charges and shipping methods (*i.e. Ground, Overnight*) and record the actual tracking numbers in the Sales Order's **“notes”** field, including multiple shipments per order. Even more features are available, including e-mail notifications to customers with direct links to the vendor's web sites for real time tracking.
- Special **“Scheduling Reports”** allow users to project inventory requirements based on Specified **“Ship-by”** Dates.
- Allows display of **“Customer Comments”** during order entry.
- Order Process Checks Customer's Credit Limit and Inventory Stock Availability.
- Ordering Process utilizes Inventory Quantity Breaks and Price Levels.
- Backlog Reporting sorted by Sales Order Number, Customer Name, Customer Purchase Order Number or Salesman.
- Backlog Report by **“ship through”** date.
- Handles both Regular Inventory Items and Non-Inventory Items.
- Prints Detailed Bill of Lading for use with International Customs Shipments.
- Allows Special Order Transfer into the Purchase Order Entry System.
- Allows Drop Shipment Transfer into the Purchase Order Entry System with Direct Shipment to Customer.
- Warning Message during recording of shipments regarding On-Hand Quantities Available.
- All Packing Lists (**picking tickets**) print Serial and Lot Numbers, if applicable.
- Allows the posting of Deposits within the Sales Order module, including Credit Card transactions.
- **“E-mail”** field has up to fifty (50) characters per order and is used for on-line confirmations that the sales order shipments have been made to customers.



- Credit Hold feature by Customer.
- Customer **“Ship-To”** address lines are four (4) lines of thirty (30) characters.
- Customer Purchase Order Numbers are twenty (20) characters.
- Sales Order Inquiries include **“Last Shipment Date”** field.
- Includes integration with **Job Cost Main Module** for posting of Sales and Cost of Sales amounts during order processing directly to a job without affecting current **WIP** amounts. This is ideal for companies seeking to track revenues against projects such as marketing efforts like trade shows, direct mail campaigns and other forms of advertising where the **“costs”** of a project need to be tracked (*i.e. Booth Expense, Travel, etc.*) and the specific project number can be assigned to any new customer that is added to the system resulting from this specific marketing effort. Only the Sales and Cost of Sales amounts in the future from the client's future purchases in Sales Order Entry will post to the Project allowing Sales Managers to determine the true value of their marketing efforts and expenditures on a project-by-project basis. Since **“Projects”** can continue to accrue figures across fiscal years indefinitely, it is now possible to truly track what the value of a customer is over long periods of time and the true worth of attending a trade show or investing in a direct mail or magazine ad campaign.
- Order type **“Return Authorization”** allows the tracking of **“returned items or RMAs,”** posts the item back into inventory and generates a Credit Memo to the Customer upon their successful return.
- Automatically places orders **“On Hold”** if user does not have the Security Access to override Credit Limits.
- **“Credit Warning”** feature based on a Past Due Aging category.
- **Credit Checking** is done during shipping, warning if the customer is over their credit limit **DURING** the option to record shipping, thus allowing the last minute opportunity to prevent further shipments to customers who are either past due or over extended customers.
- Allows the ability to change Descriptions on detail lines when selecting Inventory Items. This description will replace **“Description 1”** of the inventory item on the Sales Order and Invoice.
- Supports **“Credit Cards”** as payment method on invoices and payments. This includes **MasterCard, VISA, American Express and Discover**.
- **Payment Innovators** Draft Capture allows for credit card **“Deposits”** to be posted directly to a Sales Order and updated directly to the customer's account.
- The system will match Sales Order **“Deposits”** against Invoices generated in Sales Order so that no additional steps to match payments are required.
- Requires **DP/Charge Advanced Payment Server (Part #272)**, a **Payment Innovator's Merchant ID** and Internet access. Only customers using **Infinity POWER (Version 7.5 and higher)** are eligible to become **PCI-DSS** validated. **Any lower version of Infinity POWER is not PCI-DSS compliant.**
- All credit card data entry may be done through special **“encrypted”** EMV chip card readers sold by **Payment Innovators** to merchants so that no credit card information is ever captured at the merchant's PC without being fully encrypted first. This is the highest level of chip card protection available today.

SYSTEM INTEGRATION

- System Administrator (*Required*)
- Accounts Receivable (*Required*)
- Inventory Management
- Purchase Order Entry
- General Ledger
- Job Cost Main Module
- DP/DashBoard/CRM

GRAPHS

- Backorder Dollars By Customer
- Backorder Dollars by Inventory Item