

SALES ORDER

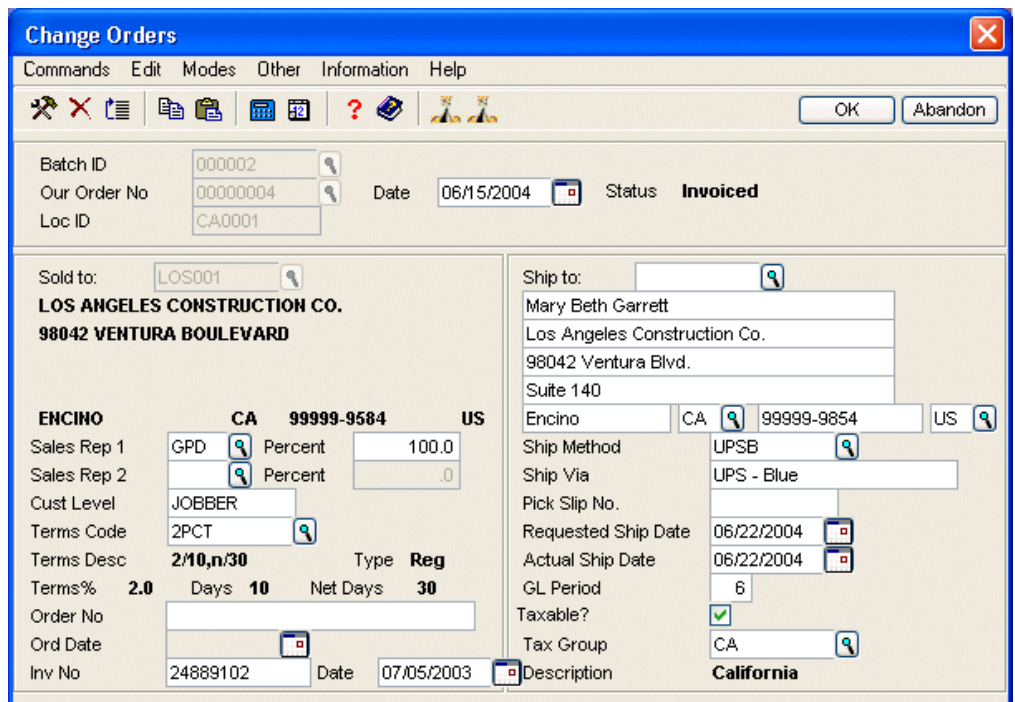
Order entry, picking, tracking, billing . . . and beyond

The success of your business depends on keeping your customers happy. You need to fill their orders promptly and answer their questions quickly. 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 will 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.

Analyze sales trends and compare the current period's sales performance with that of previous periods by looking at the summary and detail history.



Change Orders

Commands Edit Modes Other Information Help

Batch ID: 000002 Our Order No: 00000004 Date: 06/15/2004 Status: **Invoiced**
 Loc ID: CA0001

Sold to: LOS001
LOS ANGELES CONSTRUCTION CO.
98042 VENTURA BOULEVARD

Encino CA 99999-9584 US

Sales Rep 1: GPD Percent 100.0
 Sales Rep 2: Percent .0
 Cust Level: JOBBER
 Terms Code: 2PCT
 Terms Desc: 2/10,n/30 Type Reg
 Terms%: 2.0 Days 10 Net Days 30
 Order No:
 Ord Date:
 Inv No: 24889102 Date: 07/05/2003

Ship to:
 Mary Beth Garrett
 Los Angeles Construction Co.
 98042 Ventura Blvd.
 Suite 140
 Encino CA 99999-9854 US

Ship Method: UPSB
 Ship Via: UPS - Blue
 Pick Slip No.:
 Requested Ship Date: 06/22/2004
 Actual Ship Date: 06/22/2004
 GL Period: 6
 Taxable?:
 Tax Group: CA
 Description: California

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

- Produce picking slips for your warehouse employees. It will tell them which items to ship from stock. 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.
- 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".
- Save time with online printing functions. 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.
- Gain 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, or 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.
- Enjoy easy and efficient order entry 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. Use promotional pricing 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.
- 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.
- Store tracking number information by order.
- Access shipment tracking information via your web browser.
- If you misquote someone by omitting tax, you don't need to worry about the invoice not matching the quote. Adjust the Tax field on the totals screen so that you can absorb the cost difference.
- Assign lot numbers for tracking sales and calculating costs. Identify which customers made purchases from a specific lot and when they were shipped.
- 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.
- 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

Version 7.0
OSSSO70
08/15/05