

Sage Enterprise Suite — Sales Order

Web-Based Reporting

All Sales Order reports can be generated and viewed through Microsoft Internet Explorer with our Web Reports module, with the same high level of security as with the module's standard output.

Reporting Features

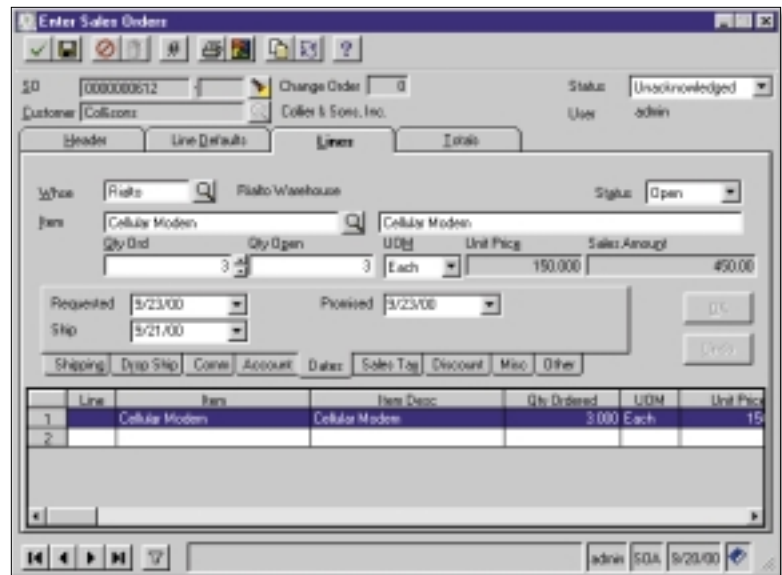
- Maintain custom layouts for printed forms used throughout all Sage Enterprise Suite modules
- Tailor Sales Order forms to your organization's design requirements
- Export all report data to an external file. Data types supported include ASCII text, delimited, Excel, Lotus 1-2-3, HTML, RTF or Microsoft Word.
- Output any report to the screen, a printer or a variety of file formats
- Create customized, presentation-quality reports through Crystal Reports software

Reports

- Back Orders
- Aged Orders
- Change Orders
- Projected Sales
- Expected Shipments
- Sales Order Profitability
- Quote Expiration
- Blanket Orders
- Sales Orders
- Sales Order Status
- Open Sales Order Items
- Sales History
- Sales Analysis

Sage Enterprise Suite of Modules:

General Ledger, Accounts Payable, Accounts Receivable, Cash Management, Financial Reporting, Web Reports, Fixed Assets, Multicurrency Management, Advanced Allocations, Consolidations, Advanced Budgeting, Purchase Order, Sales Order, eCustomer, Inventory Management, Inventory Replenishment, Human Resources, Manager and Employee Roles, Payroll, Customizer, Application Framework, Module Source Code



Enhance Customer Service and Productivity

The Sage Enterprise Sales Order module helps you maximize productivity and increase customer satisfaction by improving efficiency throughout the sales process. This module is an integral part of the Sage Enterprise distribution series, which has been designed with input from supply chain experts to meet the specific needs of businesses that stock, sell and ship products. Sage Enterprise Suite is a highly reliable, robust and integrated series of business applications that delivers a flexible, scalable and full-featured total e-business management solution.

The Sales Order module puts vital customer and inventory information at your fingertips to help you keep your most critical business processes operating smoothly and efficiently. A set of powerful sales analysis tools takes the guesswork out of maintaining appropriate inventory levels, giving you critical data to help ensure that you have sufficient inventory to satisfy customers' expectations, while stocking the precise amount of each item to maximize profits and cash flow.

With its extensive drill-down and drill-around capabilities, Sales Order lets you track a transaction, step-by-step, back to its original source. It also tracks inventory item availability, pricing, lots, serial numbers, quantity pricing, specific customer pricing, costs, and customer credit limits. You can even establish a wide range of item or customer-specific information at the sales order line, including shipping information, drop shipment requirements, commission, account numbers, vital order dates, sales tax, and trade discount percentages.

With Sage Enterprise Sales Order module, the most complex, out-of-the-ordinary tasks can be performed quickly and conveniently. You can reopen closed sales orders for returned items, set up multiple commission plans, convert quotations directly to sales orders, or ship separate line items to different locations — all with remarkable ease, saving you time, money and effort.



Sage Enterprise Suite — Sales Order

System Implementation Options *Customize your entire sales function, including discounts, credit, taxes, commissions, kitting, and more.*

- Configure the Sales Order module to meet your company's specific needs
- Assign trade discounts, payment term discounts and credit limits for each customer
- Select whether to check customer credit limits during sales order entry
- Create custom fields for the sales order and sales order line
- Set up sales tax classes, codes and schedules
- Establish multiple sales commission plans, including split commissions
- Organize kits to operate like regular items, then explode them when generating pick lists and invoices

Sales Quotation *Save time by automatically converting all types of quotations – for both current customers and prospects – into standard sales orders.*

- Enter a sales quotation with all the necessary specifications (price, delivery, conditions, expiration date, etc.)
- Produce quotations for both current and prospective customers
- Convert quotations directly to a standard sales order

Pricing *Command the flexibility to define your pricing structure and price your inventory items for maximum profitability.*

- Define flexible unit pricing based on a combination of the item price schedule, customer-specific price lists, quantity ordered, and outstanding contracts
- Originate and maintain a separate price list and trade discount percentage for individual customers
- Set up item price schedules by warehouse, date range and currency
- Automatically calculate and apply trade discounts, payment term discounts and sales taxes to the order
- Provide price breaks based on quantity, weight, volume, average cost, replacement cost, and standard cost

Sales Order Processing *Simplify and streamline workflow with some of the most powerful sales order processing tools in distribution software.*

- Integrate with the Sage Enterprise Multicurrency Management module to enter and process sales orders in any currency
- Create sales orders for the sale and tracking of inventory, non-inventory or special items
- Establish shipment of individual line items to different locations on different dates, all on one sales order
- Send order confirmations to customers
- Invoice items in full
- View available and expected quantities of items and running totals online during sales order entry
- Look up sales order revisions and dates

- Commit inventory during sales order entry
- Assign different ship-to or drop ship locations to each line
- Retain sales commission information with each order
- Attach common or free-form comments to sales orders and sales order lines
- Add associated reference codes to all line items of an order
- Record returns and generate credit memos in accounts receivable, if appropriate

Blanket Orders *Make it easy to set up and maintain blanket orders, reducing paperwork and maximizing efficiency.*

- Create blanket orders
- Use blanket orders to track and maintain customer contracts
- Generate standard sales orders from a blanket order
- Track releases against a blanket order
- Close blanket orders automatically
- Support many types of contract situations

Shipping Options *Create an efficient workflow in your shipping department.*

- Select and print picking lists by date, warehouse, transportation carrier, shipping priority or other user-defined criteria
- Choose individual orders or groups of orders to be picked
- Generate standard shipping documents, such as bills of lading and shipping labels, in addition to packing lists
- Track serial and lot information during the shipping process, in case a product recall or other event demands quick action
- After shipment, use the system to relieve on-hand inventory, update any back order quantities and create an invoice

Security *Enjoy peace of mind with highly advanced security features.*

- Set up security groups that have access to the same companies, menus, tasks, and security events
- Establish access permissions such as display only, excluded, add/change/delete, or supervisory
- Permit only authorized users to make changes to sensitive information such as commissions, trade discounts and tax classes

Sales Order Analysis *Improve customer service by providing quick and easy access to vital customer order information such as sales orders, change orders, shipments and returns, with the simple click of a mouse.*

- Provide extensive *ad hoc* query capabilities without programming knowledge or familiarity with the underlying database
- Analyze sales order, shipment and returns information based on user-defined selection criteria including customer, customer classification, date, amount, and more

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