



# AccountMate 6.0

## *Sales Order*

In our increasingly competitive marketplace, customers demand rapid response when placing orders for products and services. Your ability to process these requests in a timely and effective manner is essential to earning your customers' trust. With the **AccountMate 6.0 Sales Order** module, you have the power of a complete order entry, customer and inventory management system at your fingertips so that you can always provide your customers with prompt service on demand. And when integrated with the AccountMate 6.0 Accounts Receivable module, you receive a complete billing and receivables system that will further enhance your ability to manage your customer base and your valuable inventory.

### ACCOUNTMATE 6.0 SALES ORDER FEATURES

#### **Instant Access to Customer Information**

With the AccountMate 6.0 Sales Order module, you always have instant access to customer balances, aging totals and sales histories. If the AccountMate 6.0 Accounts Receivable module is also installed, you can review the customer's sales transaction and payment history before processing an invoice, and then preview the actual invoice before printing. The Sales Order module provides you with quick and easy confirmation of item availability, shipping requirements, sale prices, discounts and available customer credit.

#### **Complete Inventory Information Is On-screen During the Sales Order Process**

During the sales order creation and invoicing process, the Sales Order system gives you information about inventory items (such as on-hand quantities, on-order quantities, item classes and product lines) at a glance.

#### **Build On-The-Fly Kit Items**

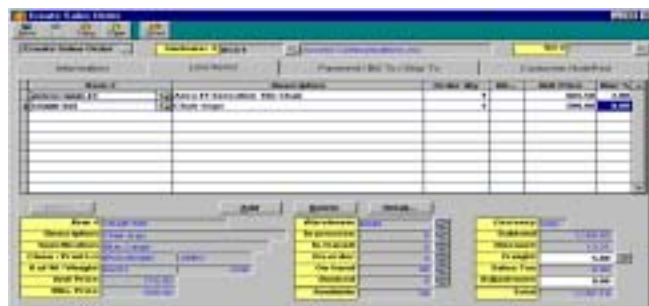
AccountMate 6.0 provides the ability to simultaneously build and ship kit items within one window. You can define ship kit items without going through the Build Kit Item function by deactivating the Require Pre-build option in the inventory record. This enables faster order processing.

#### **Customer Ledger Card**

Detailed drill down information regarding the sales invoice is now available, including check information, invoice distribution, finance charge, tax, freight, payment, etc.

#### **Blanket Sales Orders**

You can establish and authorize orders of a certain quantity of inventory items for a customer within a specific period of time. This enables your company to lock in any special price and/or discount offered to the customer. Blanket sales orders are automatically converted into sales orders when released. The Release Blanket Sales Order function enables your company to make shipments against the sales order. You can define a "valid until" date after which blanket sales orders can no longer be released. You can also insure the integrity of your data by assigning access rights only to specified personnel.



**Create Sales Order: Line Item**

#### **Average Days to Pay Information**

You can review a customer's average days to pay before processing an invoice. AccountMate 6.0 automatically computes this value based on the customer's applied payment information.

#### **YTD Sales**

AccountMate 6.0 computes the year-to-date sales separately from the accumulated-to-date sales. You therefore have the flexibility of defining the start date from which the year-to-date amount will be computed. This information serves as a determining factor for a company's rate of return on total assets, as well as receivables turnover or collection performance when compared with the customer's accounts receivable balance.

#### **Set Up and Generate Recurring Sales Orders**

With the Recurring Sales Order function, you can set up multiple recurring-sales order templates for each customer. This enables you to save valuable time by generating recurring orders for a designated period of time. You can now automatically create sales orders as often as you need them, whether weekly, bimonthly, monthly, quarterly, semi-annually, or annually.

### Mass Canceling of Sales Order Open Orders

You can now easily cancel a single open order or a range of open orders. The Cancel SO Open Order function provides the ability to set parameters for any open sales orders you want to cancel. You can indicate a single or a range of customer numbers, salesperson numbers, sales order numbers and/or order dates. Each sales order number is displayed with the open items and quantities. Simply place a check mark in the corresponding cancel box of the sales order. The time savings is tremendous since you no longer have to access each sales order to cancel the open order items.

### Advanced Billing Prior to Shipment

The Sales Order module now enables you to bill the customer in advance of shipping the order.

### Built-in Multi-Currency Functionality

Within the Sales Order module, you can set up a currency code for each currency in which you will - or might - transact business. Customers can each be assigned a different currency code, allowing your orders to be placed in their specific currency. Either the latest inventory price or the last price billed in the same currency can be used when creating sales orders.



Sales Order Module Setup

### Duplicate Sales Orders Warning

The Sales Order module creates an alert if you have already created a sales order for a given customer on the same day. This helps prevent the creation of duplicate sales orders.

### Protection against Creating Sales Orders if Exceeding Customer Credit Limit

The Sales Order module automatically provides a warning message if you are creating a sales order that will cause the customer's credit limit to be exceeded.

### Shipping Sales Orders Is Easy

With the Sales Order module, you can see each item's open order quantity. You can then either click a button to make all of the open quantities the default ship quantities, or you can enter each ship quantity manually. When shipping a sales order, the system automatically checks the quantities on hand and, if you also have the AccountMate 6.0 Accounts Receivable module, the Sales Order module automatically creates an invoice.

### Generate Invoices for Multiple Shipments

The Sales Order module generates invoices (if the AccountMate 6.0 Accounts Receivable module is also installed) either when a shipment is made or by the specific order. This allows the sales and accounting departments to tailor the invoicing method to any given customer's specific needs.

### Multiple Substitute Items Whenever the Need Arises

Within the Sales Order module, each inventory item can be assigned multiple substitute items that can be used to fill orders for items that have insufficient quantities on-hand.

### Multiple Customer Shipping and Billing Addresses

The AccountMate 6.0 Sales Order module can maintain multiple shipping and billing addresses for each customer. This feature eliminates the need to re-key a drop-ship location that is different from the billing address.

### User-Defined Sales Tax Codes

You can create an unlimited number of sales tax codes, and each code can include up to three tax entities for easy tax reporting. Each customer or shipping address has a sales tax code attached. Codes can be easily updated for changes in tax rates.

### Other Features

- Inactive Customer/Salesperson/Inventory Item option.
- Maintains unlimited data history, enabling you to reprint any sales order or review it on-screen.
- Drill-down and lookup features are included in numerous areas of the Sales Order module.
- Sales Orders can be imported when necessary.