



# Sales Order Management

Most of the sales order entry modules in the financial and ERP systems are quite basic. Almost all of them lack to access the single view of the customer details, history and transactions by the sales executive, on line information of the products or the competitors, to link to the campaign and marketing, the ability of cross selling and up selling.

EFFICIENCY Sales Order Management module is a multi tier, multi purpose order entry system as part of the sales management and the sales force automation functions of the total client and business management system.

EFFICIENCY sales order management is designed to operate stand-alone or integrated to the existing financial systems. It does not replace the existing order entry system but enhances it by taking over as front end. The data is transferred to the financial system and usually all the related modules are updated in real time dictated by the business rules.

Each sales order, entered directly or via e-commerce creates an activity transaction for the customer, contact and the executive. Selected products may be sold as part of the loyalty marketing and the accumulated points can be redeemed using the sales order entry module.

- On line analysis of the market reactions, product demands and the competitor activities for the marketing department;
- Pro-active selling by creating and maintaining the dynamic follow up schedules for the sales force.
- Dynamically created and self-controlled incentives for the sales force as points or commission values.
- Better pricing strategies for the sales team when the competition is hot by using the live profit analysis and on line adjustment functions (cost, price and margins) based on the vendor price, exchange rate, margin fluctuations and the levels of competition at the items and totals level.
- Multi-tier and multi-purpose special pricing function automatically calculates the selling price and applies to the line item
- The most suitable tools and strategies are readily available to close the sales as a result of the direct integration of the Sales Order Module to the Campaign Management, Mail Marketing and the Telesales modules.
- Better customer service and better customer evaluation based on the activities history of the Order follow up cycles.
- Loyalty Marketing for the selected customers and selected products.
- Quick Order Entry by using the Customer Quotation, Order or the Sales History.
- Entering Orders against the catalogues.
- Integration to e-commerce.
- Access or alteration of the minimum selling price, cost and standard price are protected at user levels



The Order Entry Module is maintained at the Order Tab Folder, which has three tab sheets and an access path to all the features of the module, the Order (Header) Tab Sheet, Details Tab Sheet and Order Lines Tab Sheet.

## Order (Header) Tab Sheet

The **Order (Header) Tab Sheet** contains a vast amount of control and statistical data.

## Campaign Management

Each Order is attached to a campaign split and therefore to a campaign header record. The actual Order values automatically update the campaign split and the campaign header records as well as the sales executive's evaluation, commission points and values for a wide range of time intervals.

## Company and Contact

A new company structure including the contacts (employees) may be created or the existing records may be edited.

## Defaults and User Preferences

Each User can have a pre-selected **default template**, which automatically fills the header and the line entry fields during the creation of a new Order. If there is more than one default record in the system, a pick list is displayed.

Each User can determine the personal User Preferences for Order Module defaults and selection parameters.

## Templates and Order Duplication

Orders with the "Closed" (completed) status or Orders that have been prepared as templates may be reactivated by copying it to a new Order for another customer or for another executive.

## Activity - Follow up

The Order Module creates **the activity history and follow up** records dynamically within the Call Transaction module. This ensures that Orders and Proposals are very much an integral part of your Sales, Marketing and Customer Service tools.

Each new Order automatically creates a new **call transaction** and any subsequent Order follow up creates a call **follow up transaction** in the system. This function ensures that all the activities related to any Order are also accessible from the other parts of Efficiency instantaneously.

## Security

Multi-level security and authorisation for accessing, modifying and printing an Order is available. Further access privileges at a user level are available for controlling the cost, sell price and minimum price.

Order ID	Order Executive	Order Cost	Order Value	Site	Company
3000104	Katherine	0	83.00	00001	Action Marketing
3000101	Ahmet	411000.0000	850970.00	00001	Hold Down Fasteners
3000109	Katherine	1800.0000	20479.00	00001	Action Marketing
					Minimum Price Overiden

## Order Details Tab Sheet

Additional master file details such as Notes and Profiles are maintained on the Details Tab Sheet.

## Presentation and Printing

Each Order may be presented in any number of formats using a report writer, word processor or OLE2 automation. The output can be dynamically changed to any other available templates.

## Notes

An unlimited number of notes and remarks can be added to each Order record. This can be date and time stamped and assigned to an executive with a security level.

## Profiles

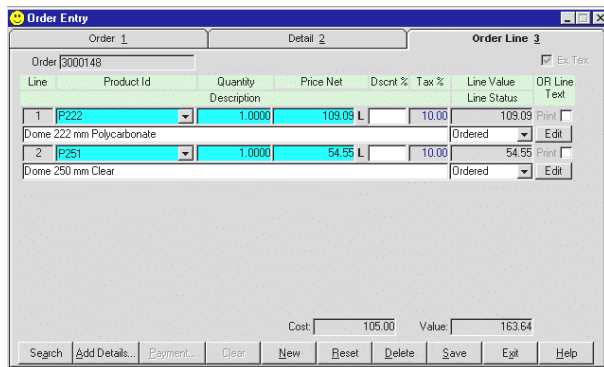
An unlimited number of user-defined profiles can be assigned to each Order record.

## Expansion

An unlimited number of user-defined fields can be added to the module.

## Order Lines Tab Sheet

Each Order may hold an unlimited number of line items, either created from the Product Module or entered as free formatted text. The special text lines from the product module may be added to each Order line with or without being edited. The Order lines are maintained on the Order Lines Tab Sheet.



## Product

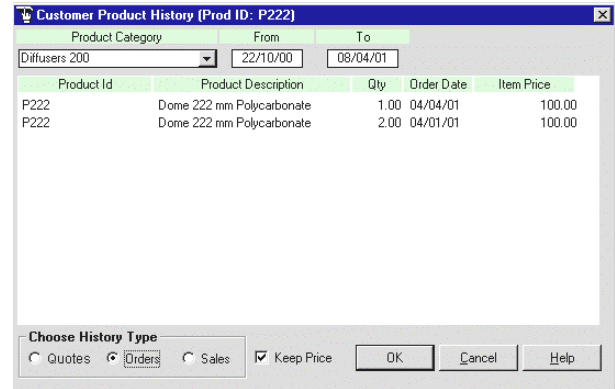
The product tab folder with the selected product information can be accessed directly.

## Product References

The Vendor and the Competitor Product sales and technical details can be displayed.

## History and Buying Patterns

The historical product information of a Client can be viewed:



A customer's previous purchases can be used to fill the Order line items. The Quote, **Order** and **Sales** radio buttons will display the relevant information. A selected line item can be dragged and dropped onto the new Order as a new line item using the historical price or the up to date price.

## Special Prices

The product selling prices may be automatically calculated and displayed from the **Product Special Prices** by using various user defined **price combinations** for the **campaign**, **customer type** or individual **customer** record. If the user has the authority and sufficient rights, the line prices can be overwritten, but not less than the pre-determined **minimum selling price** value. Similarly, the 'Product Cost' fields have limited access based on the Executive's access rights. Each Order Line can have a further discount and tax (sales or VAT) automatically calculated into the Line total, Section total and Order total value while the data is entered.

## Foreign Currency

An Order can be prepared on a selected foreign currency for which the exchange rate can be altered at any time.

## On Line Performance Analysis

The commission points and the percentage values for an Order Executive can be displayed. As the Order line items are being maintained, the values on this window are dynamically updated.

Period	Points	Value
This	2	25.92
Today	0	0.00
MTD	0	0.00
YTD	0	0.00

## Customer Loyalty Points

Loyalty points can be accumulated for each customer based on the product being ordered. Products can be marked via the product management module in order to assign a point's value or negative points value for redeeming points. As a customer orders each product, these points are accumulated.

Period	Points	Value
This	0	0.00
Today	0	0.00
MTD	0	0.00
YTD	0	0.00

## Line Price and Profit Analysis

Double clicking on the 'Price' column accesses the Price and Profit Analysis window. It is used to manage the line price and profit values.

The **mark up**, **gross margin** or the **sales price** can be modified and the corresponding results observed. The modified values can be applied to the existing line values. The corresponding section and Order values are updated in real time.

Pricing Structure for P3VS150		
List Price	120.00	Commission Points 2.00
Min Sell Price	72.00	Percent 10.00
Your Sell Price	120.00	Discount .00 %
<b>Costs</b>		
Standard	Average	Last
60.0000	60.0000	60.0000
<b>Gross Profit</b>		
Per Item	Line	Margin <input checked="" type="radio"/> Markup <input type="radio"/>
60.00	60.00	50.00 %
OK	Cancel	Help
		Compute

## Line Quantities

The various quantities of each line item is displayed when double clicking on the 'Qty' column.

If the Host Inventory System is integrated with Efficiency, the quantities are displayed from the Host System Warehouse locations.

## On Line Enquiries

During the Order line entry, you may activate the following enquiries for Customers, Executives, Products, Product Knowledge (Technical Details) and Product References (Vendor and Competitors' product details):

- Order Product History
- Product Sales History
- Product References
- Product Knowledge
- Executive Order History

## External Order Generation

Orders received via the Internet or external sources can be piped into the database and converted directly into orders in Efficiency for further processing without the need for re keying of data. During this stage if the customer does not exist, they too can be created from the information gathered before the order is processed.

## Update Order to host

If Efficiency is integrated to a 'Host' financial and inventory system, orders can be uploaded to the system on-line, as well as related information for each product line, such as Quantity-on-Hand and Special Prices being accessed online.

## Reports and Enquiries

A considerable number of standard reports are provided. The following titles are a selected sample:

- Order by Product
- Order by Product Category
- Order by Executive
- Order Details

The InfoMaker report writer or any other ODBC report writer may be used to create customised reports.

## *Other Features*

- Set Budgets and Performance values.
- Graphics, pictures, drawings etc. can be attached to the Order record.
- E-Mail the user defined Order sheet to the client or to the other members of your organisation by either using the direct E-Mail or Document Routing functions.
- Drill down access to the Order module from the Customer, Executive History and Schedules or from the Order Follow up Schedule.
- Assign a temporary executive to follow up the outstanding Order for the absent executives.