

Customer Order Processing Overview

Powerful and highly sophisticated, COP provides the following phases of order processing:

Highlights:

- It transforms purchase order information to an actual order.
- Generates a picking ticket and prints customer invoices.
- The ability to track quotes and later converting them to actual orders with out re-keying.
- You can enter credit to generate a credit memo and update your receivables.
- Versatile, COP gives you the option to process in a single or two-step billing process.
- The Automatic Credit hold feature will help maintain the necessary controls that a fast paced company demands.
- Powerful sales desk is an extension to the traditional order entry screen.
- Track shipment information in order and invoice history inquiry.
- Email order acknowledgement. (Utilizes eContact database)
- Email shipment notification.
- Print invoices and picking tickets.
- Access customers by either customer number or name.
- Display inventory at order entry time.
- Perform on-line credit checks.
- Maintain three tax accounts per transaction
- Use multiple sales and cost of goods sold accounts.

- Generate and fill back orders.
- Support order entry from multiple stocking locations.
- Define selective and partial billing of line items.
- Setup pricing and discount categories through flexible, user-defined codes based on customer numbers, customer types, quantity ordered, product categories, item numbers, various combinations thereof, and/or special sales prices.
- Generate packing lists and shipping labels.
- Search by Customer Name, Customer number, Phone, ZIP code, and User defined selections.

Integration:

Accounts Receivable:

- Customer record information of salesman, tax codes, ship via, terms code, inventory location, credit information and order discounts are automatically displayed during Order Entry.
- Sales commission rates are maintained in A/R by customer type and commissions are calculated in COP.
- Customers may be flagged for standard order options. For instance, no back orders, no partial shipments or credit holds.
- Invoices and payments are posted to A/R.
- Customers not on file may be added during Order Entry.
- Sales commission rates are maintained in A/R by customer type and commissions are calculated in COP.
- Invoices and payment are posted to A/R.

Purchase Order:

- Sales Order can optionally be copied to P/O to generate a purchase order requisition. The requisition(s) can then be converted to a purchase order.

Bill of Material:

- Order Entry will “Blow through” up to 11 levels of a bill of material to allocate components on-line and relieve components on-line and relieve components quantities during posting.
- The picking ticket will include all components associated with an order line item.

General Ledger:

- G/L transaction for sales, cost of sales, payments, etc. are distributed to G/L through A/R.

Reports Provided (Partial List)

- Order Acknowledgement
- Picking Ticket
- Order Edit List
- Ship-To Address Print-Out
- Price Code List
- Sales Analysis by Sales Volume
- Sales Analysis by Item
- Sales Analysis by Product Category
- Sales Comparison by Customer
- Sales Comparison by Customer and Product
- Sales Comparison by Product and Customer
- Sales Comparison by Product Category and Product
- Sales Comparison by Salesman, Customer, and Product