

## Sales Order Processing

[ BENEFITS ]

### Build strong customer relationships

Delight your customers and increase retention with optimized invoicing and distribution capabilities that speed inquiries and order deliveries, reduce errors, and minimize costs.

### Increase sales success

Improve service and boost revenues with customer priority ranking, and expand your customer base and close more sales by tracking and managing potential customers as prospects, separate from other clients.

### Increase office productivity

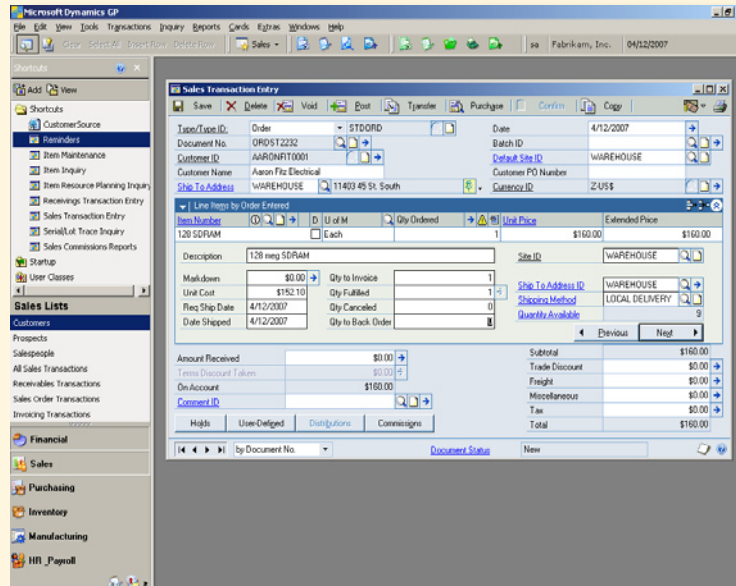
Improve employee effectiveness and speed through invoice entry in a single window, with the ability to view all orders, invoices, back orders, and returns in one location.

### Fully automate your invoicing

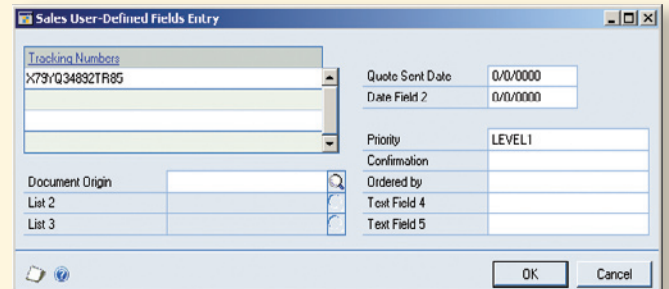
Expand your distribution capabilities and gain flexibility in reporting, order management, inventory control, and general ledger with seamless integration across Microsoft Dynamics™ GP.

By managing the entire sales process—from start to finish—with **pinpoint accuracy**, you can serve top customers more effectively, monitor fulfillment and invoicing more precisely, and streamline processes to minimize shipping costs and labor.

ENTER QUOTES, ORDERS, back orders, invoices, and returns from one central location.



VIEW ALL DETAILS at the line-item level, including unique ship-to addresses per line item.



CUSTOMIZE DATA ENTRY to fit your unique business needs with user-definable fields.

## Customer Priority Ranking

Improve service efficiencies — with an eye on profitability — by quickly identifying your top customers based on their priority rank. With Customer Priority Ranking you can:

- Assign each customer or customer class a ranking of 1–99, or none.
- Target specific customer information with restrictions by priority rankings assignments.
- Use Advanced Distribution capabilities to direct allocations to specific customers based on priority.

## Flexible Order Processing Capabilities

Modify sales documents to accommodate your company's unique business needs. With flexible order processing capabilities you can:

- Tailor the sales process with custom business rules.
- Enter negative quantities and prices on invoices to record and manage promotional giveaways and other "exception" sales transactions.
- Remove or replace line items without special editing actions by simply retyping over the current line.
- Customize document fields to tailor the type of information to your business.

## Optimized Distribution Options

Minimize costs, shorten delivery cycles, and ensure sales items receive priority with flexible shipping capabilities and Purchase Order Processing integration. With optimized distribution options you can:

- Assign fulfillment sites based on their proximity to customer ship-to locations.
- Send items from a single order to multiple customer sites.
- Automatically populate Purchase Order Processing receiving shipments with information from corresponding sales orders.

[ FEATURES OVERVIEW ]

## Invoicing

### Single Window Entry

Improve invoicing efficiency with single-window entry for streamlined access to all vital information, as well as batch processing and easy return transaction processing.

### Posting and Document Dates

Assign separate document and posting dates, and record quote and order dates, as well. Assigning separate documents and General Ledger posting dates enables you to post documents to the correct accounting period, especially useful when recording "after the fact" invoices.

### Definable Fields

Customize the type of information that's unique to your business, using two definable fields on invoices.

### Cross-Module Inquiries

Keep the most important information in front of you while drilling down for more details; making inquiries across Microsoft Dynamics GP applications; or bringing up customer payment, shipping, and billing information.

## Sales Order Processing with Advanced Invoicing

### Discount Management

Specify how discounts should be managed, then enter markdowns as percentages or amounts. You also can choose to enter trade discounts for an entire document.

### Drop Ship Material

Reduce the need for keeping excess inventory on hand. You can order items from your supplier to be sent directly to your customer by entering drop ship items on sales transactions.

### Kit Items

Create kit items (groups of items commonly sold as a single unit) in the Inventory module and sell them through Sales Order Processing.

### Information Availability

Locate orders quickly by search for specific order types. Easily locate quantity ordered, back ordered, previously invoiced, canceled and allocated item information by accessing the Sales Quantity Status window.

### Track Orders with Custom Link

Track orders by entering a tracking number in Sales Order Processing and using the hotlinks to UPS or FedEx sites to track shipments online.

### Customized Transactions

Tailor order entry to your specific needs with customizable order defaults, price overriding, special instructions, and control at the line-item level.

### Unlimited Process Holds

Define, review, or change an unlimited number of process holds to sales documents.

### Repeating Documents

Save time and help ensure accuracy by transferring information from an existing sales order to a new sales order.

[ FEATURES OVERVIEW ]

<b>Ship-to by Line</b>	Speed time to delivery through multiple ship-to addresses on an individual order. Send each line item on an order to a different site for that customer, saving order entry time and consolidating tasks for faster throughput.
<b>Credit Card Payment Processing</b>	Avoid delays and costly errors by processing sales orders and credit card authorizations without charging the card or recognizing revenue until the order ships.
<b>Multiple Site Allocation</b>	Manage inventory shortages by allocating inventory from multiple sites for the same item, as well as options including substation, overriding, or selling the balance.
<b>Prospective Customers</b>	Track and manage potential customers as prospects, separate from existing accounts.
<b>Routine Documents</b>	Create routine documents such as quotes, orders, and invoices, or more complex ones like sales analysis reports, in print or on-screen formats. Electronic search capabilities help ensure you find the information you need.
<b>Automated Distribution</b>	Tailor the distribution process to your business practices through seamless integration with other Microsoft Dynamics GP modules, such as Advanced Distribution and Available to Promise.
<b>Customer Priority Ranking</b>	Assign priorities to customers and customer classes, improving service efficiencies with an eye toward profitability.
<b>Negative Price/Quantity in Sales Order Processing</b>	Enter negative prices and quantities to track line discounts, rebates, and returns — all on a single document.
<b>Sales of Discontinued Items (Option)</b>	Manage inventory more effectively with optional settings that prevent discontinued items from being entered on a quote, order, back order, or invoice.
<b>Ship Complete</b>	Set customer preferences for “ship complete” to default to sales documents, with the flexibility to change preferences at any time.
<b>Default Site per Customer</b>	Speed fulfillment and minimize shipping costs by specifying fulfillment sites based on customer ship-to locations.
<b>Sort Pick Ticket by Bin</b>	Optimize picking efficiency with the ability to pick according to warehouse bin locations.