



Sales Order provides complete control for the order and billing process along with tracking and processing throughout the entire sales order process.

TakeStock Data Sheet: Sales Order

The TakeStock Sales Order system streamlines order entry, quotes and other sales related functions. With the click of a button, both credit history and past purchasing information are available at order entry, enabling customer service representatives to provide best-in-class customer service. The ability to control the override of default prices and taxes, price selection hierarchy and gross margin targets helps provide maximum flexibility during the order process.

Automatic generation of related documents (purchase orders, transfer orders and production orders) linked by stock reservations enable the distributor to offer complex fulfillment services to their customers with utmost confidence that all of the necessary transactions will flow smoothly and reliably.

Order Processing

- Generates quotes for permanent or temporary customers, allowing order conversion for permanent customers
- Calculates prices, recalculates price to meet target gross margin for line item or order
- Converts multiple units of measure allowing items to be sold by unit and priced by another
- Allows entry of percentage or dollar discount for each line item and/or total invoice amount
- Streamlines backorder fulfillment, minimizing lost sales and enhancing customer service
- Reserves inventory for an order from incoming purchase orders, transfers or production
- Generates a purchase order, suggested purchase order or production work orders for special order or direct-ship items
- Controls shipping with options of ship complete, complete lines and partial with remaining complete

➔ KEY REPORTS:

- Order Status
- Order Booking
- Daily Shipping
- Unbilled Freight
- Direct Ship/Non-stock
- Lost Sales
- Returns
- Route Recap
- Quotes
- Pick Tickets
- Invoices
- Daily Sales Register
- Blanket Order
- Customer Price List
- Overdue Order

Future Order

- Handles shipments from multiple warehouses and direct ships on a single order
- Assembles finished items to order by customizing existing bill of material items
- Locates items by item interchange, including customer item numbers
- Speeds data entry of related items through phantom items
- Provides flexibility of multiple ship-to's on a single order
- Manages receipt of multiple deposits against an invoice
- Processes orders received from Internet, EDI, or SO document import
- Processes repeat orders quickly using past sales template
- Provides enhanced order booking detail item analysis reporting
- Provides an invoice reversal feature that creates credit memos
- Multiple views of item or pricing detail in line item entry by user
- Facilitates front counter sales
- Supports multiple bill-to's in SO entry
- Provides order or line item notes

Inquiry & Reporting

- Facilitates front counter sales
- Supports multiple bill-to's in SO entry
- Offers preprinted and non-preprinted invoices
- Maintains detailed sales history for inquiry
- Tracks lost sales and reports by reason code and warehouse
- Expedites order fulfillment
- Order management
- Validates customer information, including credit limit, ship-to addresses and payment terms
- Interfaces to Accounts Receivable, Inventory Management, Purchase Orders, Sales Analysis and General Ledger for seamless
- Permits daily tracking of cash, checks and credit cards through user-defined payment types
- Captures information specific to your operation through user-defined fields, without costly programming changes
- Handles tax rates based on product classification and resale status with up to five jurisdictions
- Analyzes gross margin for stocked and non-stocked sales
- Allows definition of price selection hierarchy
- Controls terms and conditions and makes quoting easier
- Additionally, stock or non-stock parts used in Service and Repair affect usage and replenishment

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