

Streamline the SOP cycle and increase productivity

- ▶ Covers complete sales management process
- ▶ Enter complex orders quickly and accurately
- ▶ Recurring/Standard Orders
- ▶ Reduce keystrokes for order entry
- ▶ Automatic back ordering
- ▶ Delivery route and drop techniques
- ▶ Direct delivery
- ▶ Freight cost calculation processing is available
- ▶ Capture credit/debit card details
- ▶ Log customers calls
- ▶ Pack/container tracking
- ▶ User definable substitution facility
- ▶ Sales Kits
- ▶ Make To Order with user selectable variant processing
- ▶ Advanced Pricing and Discounting
- ▶ Promotions and Multibuy
- ▶ Margin Management
- ▶ Invoice on POD options

Answer Sales Order Processing (SOP) leverages information from the rest of the business to optimise order fulfillment processing.

Your sales and distribution staff will have the tools they need to achieve results and increase efficiency.

Customer Service personnel can immediately access all Order, Customer, Payment, Inventory and Manufacturing information. They can respond to all requests there and then from Customers and Potential Customers.

Despatching and Warehousing operations are able to ship more products, on time, with greater levels of accuracy, with complete documentation sets and with total control of the Back Ordering, Reservation and Allocation facilities.

Sales Management personnel have the information that they need to make decisions over pricing, delivery etc and can successfully plan future marketing and sales campaigns.

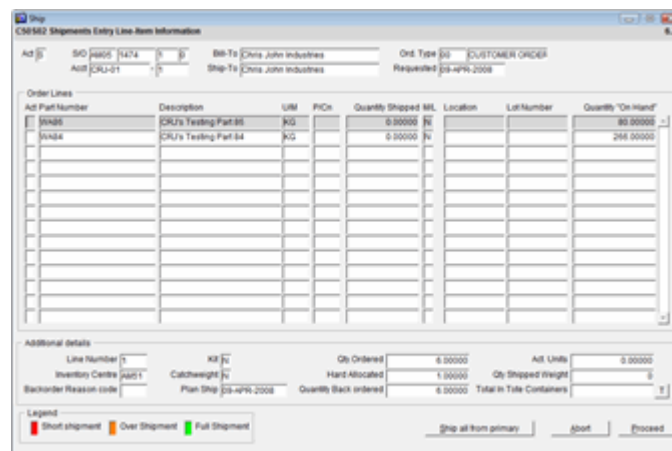
Answer SOP covers the complete Sales Management process from initial call, quotation and available to promise, through to Sales Order entry and progressing, to despatch and invoicing and finally to the analysis of all aspects within Answer Enterprise.

Enter complex orders quickly and accurately

Select the SOP entry methods that best suit your business.

Enter complex orders quickly and accurately and to take advantage of pre-defined templates for straightforward orders.

Use of Customer Part Cross Referencing is available to improve Customer Service.



Ship
 CMEB2 Shipments Entry Line Item Information

Ad # [SID 1474] Bill To [Chris John Industries] Ord Type [CUSTOMER ORDER]
 Ad # [CRU-01] Ship To [Chris John Industries] Requested [23-Apr-2008]

Order Lines	Ad Part Number	Description	UM	PCx	Quantity Shipped	ML	Location	Lot Number	Quantity "On Hand"
	6488	CRU's Testing Part 64	KG		0.00000	N			80.00000
	6488	CRU's Testing Part 64	KG		0.00000	N			256.00000

Additional details

Line Number [5] Alt [N] Qty Ordered [0.00000] Alt Units [0.00000]
 Inventory Centre [ADD1] Catchweight [N] Hard Allocated [1.00000] Qty Shipped Weight [0]
 Backorder Reason code [] Plan Ship [23-Apr-2008] Quantity Back ordered [0.00000] Total in Title Containers [1]

Legend
■ Short shipment ■ Over Shipment ■ Full Shipment

Ship all from primary [] Abort [] Proceed []

Take orders with user selectable variants

Take Orders for products that have user selectable variants. During the Order Entry Processing, the various options for each variant can be determined. For example, when ordering a Standard Chair of a particular style there may be variants for 'Wood Stain', 'Fabric' and 'Trim'. These can be determined at Order Entry time and a back to back Work Order created that includes the options selected.

Take Orders with user defined attributes

Take Orders for Parts/Products that have been defined using the Item Attributes module. This enables attributes such as Season, Style, Colour, Size etc. to be easily and accurately ordered.

Recurring Standard Orders

Answer has the concept of a Recurring Standard Order which determines the products the customer takes and the frequency that they are delivered. Based on a Customer Stock. Check the Order Quantity is calculated when the Sales Order is generated. A new occurrence of the order is generated in preparation for the next time.

Take Orders for 'Tendered' customers

This enables you to take Sales Orders where the Customer pays using a Tender i.e. credit/debit card, cheque etc. This is also fully integrated to the EFT/Chip n Pin processing options to provide a seamless payment process.

Reduce keystrokes for order entry

Comprehensive Customer Order Type and Part defaulting mechanisms also ensure a large reduction in the number of keystrokes that have to be made to enter an Order.

This together with the number of lookups at the Customer, Part and other levels enables you to choose from lists of easy to locate details rather than having to remember numerous codes.

Sales Orders can be back to backed with Works Orders or Purchase Orders.

Flexible release on order shipping

Order Shipping and its flexible release mechanisms enables Inventory and Warehousing staff to plan and meet their Work Load Requirements and deadlines.

Where items are in short supply they can be automatically Back Ordered – multiple times if required – provided the Customer authorises the Back Ordering situation.

At time of shipping the ability is provided to track the tote/containers that the Products are shipped in. This gives the facility to provide a breakdown of what has been shipped in each tote/container or to be able to determine in which tote/container a particular part is in.

Delivery route and drop

Delivery Route and Drop management techniques can be applied to Customers and their associated Sales Orders, thus aiding Load and Route Planning.

Direct Delivery

Direct Delivery, sometimes referred to as Drop Shipments, enables Customer Orders to be delivered by the Vendor supplying the goods directly, thus avoiding Warehouse Stock Holding and Handling Costs.

Orders and/or Order Lines can be optionally defined as being directly delivered from your Vendors warehouse. This facility generates all the necessary back to back Purchase Orders, Accounts Payable Invoices etc.

Proof of Delivery Processing

A full and comprehensive Proof of Delivery, POD, process is available with the option to adjust the order based on POD details or to partially credit the POD details, or to credit and re-generate, based on User preferences.

Freight cost calculation processing

Freight Cost Calculation processing is available and can be applied on a Carrier by Carrier basis with all appropriate accounting postings. The ability to generate a Purchase Requisition, Purchase Order or Receipted Purchase Order is available to aid in the matching of 3rd Party Haulier Invoices.

Sales Orders can also capture Credit Card details for offline Credit Card authorisation processing and recording which should ensure more straightforward order management.

Capture Credit/Debit Card details

Orders can be paid for with any form of pre-defined Tender, cheque, credit card, debit card, vouchers etc. All appropriate postings and credit card cost accruals can optionally be generated.

Availability checking during order entry

Answer Sales Order Processing helps to ensure a high level of Customer Service by providing availability checking during Order Entry, comprehensive Customer defaulting for shipping and export preferences to ensure each Order is handled in the correct way. A large range of enquiries looking at Customer Orders, Shipments Made, Carrier Details etc. allow a high level of responsiveness to your Customers queries.

Log customer calls

Customer calls could be anything from complaints to enquiries or suggestions.

Log these calls and provide a fully featured action and response mechanism. This is complimented by enquiries and reporting so as to enable historical analysis and queries to be performed for Customer Complaints by Customer, Part, etc, and even the Customers end Customer can be recorded and analysed.

Pack/container tracking

Answer SOP provides a Pack/Container Tracking for those industries who have a requirement to track their Packs/Containers to and from their Customers. There are facilities to track which Customers are slow at returning Packs/Containers, which could be regarded as a critical resource in the Manufacturing or filling operations of your plant.

User definable substitutions

A full User definable Substitution facility is available for those Parts when availability drops to below zero. It also provides a facility to restrict distribution of nominated products or Groups of Products to Customers, Markets, Countries etc.

This Market Availability and Substitution can be effectively utilised to control Distribution, and substitute promotional stock or basic stock for periods of time as best fits your business. Superseded parts are always checked to ensure the right part is chosen, even when an old code is entered.

Tightly coupled with the Intercompany Purchasing/Sales relationship, this will assist in automating the various steps in the business cycle.

Advanced Pricing and Discounting

Extensive pricing capabilities exist for price lists. These can be defined as VAT/Tax exclusive or inclusive, have quantity breaks and applied to families of products as well as being in any currency.

In addition, unlimited discount structures can be defined, made date effective, restricted to Customers and/or products and the effects posted to the General Ledger.

Promotions and Multibuys

Promotional and Multibuy activities are fully supported, offering the typical buy 3 pay for 2, buy one get one free (BOGOF), buy 3 get lowest cost one free, and much more.

All under user control, date effective and so on.

Margin Management

For those environments where a certain amount of bargaining/haggling takes place when orders are being taken, margin limits can be defined and managed. Order lines can be held or rejected if margins are not met.

As an integral part of Answer Enterprise, Sales Order Processing integrates with Inventory and Warehouse Management, Purchasing and Quality Management, the Planning modules MPSP, MRP and CRP, the Manufacturing Management and Finance modules of Answer, ensuring a seamless operating environment.

Sales Order Management

- ▶ Sales Order Entry, Print and Change
- ▶ Multiple Sales Order Entry Methods using EDI, WEB, Telesales, Template, Standard Order Form, Same As Except, Full, Recurring Standard Orders, which can be mixed as required
- ▶ Minimise Sales Order Entry time by defaulting information for Customers, Parts and Order Type
- ▶ Optionally set up Customer PO by effectively and automatically copying in
- ▶ Multiple Credit Checking Options for Customer or Group Customer
- ▶ Comprehensive Pricing and Discounting options, including Multibuys
- ▶ Market Availability Checking
- ▶ Optional Automatic Substitution Processing
- ▶ Handles Superseded Parts
- ▶ Facilities for Immediate Shipment Orders which automatically relieve Inventory based on pre-defined Customer preferences
- ▶ Multiple User configurable Order Types, with authorisation values enabling the creation of Orders, Credits, Debits, Miscellaneous Billings etc
- ▶ Sales Orders can be of any supported currency with rate locking defined by Customer preference
- ▶ Sales Order Cancellation with Reason Code Analysis
- ▶ Customer Launch Sales Order Generation by Location, Launch Group
- ▶ Hold Code Processing and Authorisation by Value, Quantities, Margin and Product Points where below Minimum or above Maximum details defined
- ▶ Hold Code Processing and Authorisation by Customer, Part, Order Type and Minimum Margin
- ▶ Unlimited Order Lines per Order with full manual override where authorised
- ▶ Unlimited Order Line Units of Measure
- ▶ Option, via a privilege to override VAT Rate at line level
- ▶ Show what Customer has **not** ordered
- ▶ Quotation Creation, Convert Quotation to Sales Order
- ▶ Take a Sales Order and save as a Quotation if required
- ▶ Calculate provisional Sales Commissions
- ▶ Reserve stock during Order Entry for a Customer
- ▶ Optional Inventory Allocations within Sales Order Entry
- ▶ Optionally Print Acknowledgments
- ▶ Automatic Sales Pick List Submission
- ▶ Sundry Invoices and Credits
- ▶ Pro forma Invoices
- ▶ Assign Unlimited Sales Charges as Percentages, Amounts etc
- ▶ Apply User defined Sales Terms with or without Terms Discounting
- ▶ Back to Back Sales Orders/Purchase Orders
- ▶ Back to Back Sales Orders/Work Orders
- ▶ Ability to Order Products with Variants and select options at time of Order Entry
- ▶ Ability to Order Sales Kits
- ▶ Ability to flag a Sales Order Line as a Direct Delivery from a Vendor to the Customer, either by Post Code, Allocation Code or by Part
- ▶ Ability to enter Orders using Basic or Telesales Order Entry by using Customer Part Number. Option tailorable by Customer/Location
- ▶ Ability to sell Non-Stock Items – Items that are defined for which you have no stocks
- ▶ Ability to order Catchweight Parts by either Weight or Number of Units
- ▶ Sales Orders can be automatically generated by selection options from the Item Attribute Matrix
- ▶ Ability to access, at the click of a mouse, extensive Product and Customer information
- ▶ Ability to accept and process Tenders at the time of Order Entry
- ▶ Quick Order Maintenance Options
- ▶ Immediate access to Customer's financial situation
- ▶ Last 3 periods of sales always available on screen
- ▶ Margin management, required and achieved are always displayed based on security
- ▶ Instant access to Quantity Break details with automatic prompting
- ▶ Back Order visibility for Customer, Products and more instantly available
- ▶ Review at the touch of a button any previous Telesales calls and their outcomes
- ▶ Easily view what has not been ordered compared with the Customer's usual ordering patterns
- ▶ Optionally capture tracking data i.e. Campaigns, Projects, Media Codes, Lead Sources, Order By

- ▶ Inter and Intra Company Sales Processing
- ▶ Use Customer Part Numbers for Ordering purposes
- ▶ Create Route/Drop Customer Details that are automatically assigned at Order Entry
- ▶ Record Delivery Booking or Customer Pick-up Booking details
- ▶ Automatically Split Orders to User Defined Product Characteristics, Hazardous/Non Hazardous etc

and up to 10 additional user fields for later analysis and processing

- ▶ Sales Order Major event Audit tracking
- ▶ Ability to order Parts in different Pack/Containers and optionally track those Pack Containers
- ▶ Available to Promise and Available to Make facilities during Order Entry

Sales Order Bookings/Pick Up

- ▶ Define on an order by order basis whether a booking for delivery has been made, and if so, the date and time and whether it is a firm or tentative booking
- ▶ Define on an order by order basis whether the Customer is going to pick up, if so, the date and time and all necessary vehicle reference details

- ▶ Charge booking and pickup details outside the main order entry/maintenance cycle

Accurate Commitment Management

- ▶ Available To Promise as a real time process in all appropriate Sales Order Entry Routines
- ▶ Checks, Inventory, Warehousing, Manufacturing, Planning, Purchasing and Plant Maintenance and optionally Sales and Purchase Contracts

- ▶ Customer Order Commitment Evaluation enables an informed view to be taken if large or sporadic orders are taken as to their effects/impact on regular business
- ▶ Capable To Promise checks what Raw Materials/Components are short so as to enable better promise dates

Standard Order Form/Template

- ▶ Define unlimited Parts to be displayed in a user defined sequence
- ▶ All Parts can be date effective
- ▶ Define Standard or normally ordered quantity
- ▶ Define Maximum quantity above which you usually wouldn't accept
- ▶ Assign to Customers, Customer Locations

- ▶ Print Standard Order Forms/Templates for order data capture
- ▶ When using the Standard Order Form/Template, adding additional options is straightforward
- ▶ Automatic creation of Standard Order Forms based on Sales History

Direct Delivery/Drop Shipment

- ▶ Create Direct Delivery/Drop Shipment Sales Orders or Sales Order Lines
- ▶ Options to select Vendor based on Postcode, Allocation Code or by Part
- ▶ Indicate which Sales Order Note Code, text and Instructions to copy to Purchase Order
- ▶ Optionally create necessary Purchase Order details for line(s) to be Direct Delivered
- ▶ Authorise and/or Approve Purchase Order/Sales Order details

- ▶ Record the actual delivery of goods by the Vendor which creates Shipment details and Goods Received Not Yet Invoiced values
- ▶ Optionally record short shipment
- ▶ Optionally arrange Direct Delivery after the Sales Order has been taken

Sales Order Route and Drop Management

- ▶ Load Analysis, showing Orders, Weights, Values
- ▶ Print Vehicle Loading Manifest by Route
- ▶ Ability to transfer/move Orders between Routes to aid Load Planning
- ▶ Either predefine Route and Drops or allocate during Order Entry

User Sales Order Holds

- ▶ Define Hard or Soft Holds
- ▶ Define either a user or list of users who can release the hold
- ▶ Attach Hold Codes to Customer, Parts and Credit Manager to default into a Sales Order
- ▶ Apply Holds for Recurring Standard Orders if not authorised or outside order lead time
- ▶ Applied via a Cash Management Action/Response against a Customer or Vendor
- ▶ Apply Hold Codes for Minimum Quantity, Value, Margin or Points
- ▶ Apply Hold Codes for Maximum Quantity, Value, Margin or Points
- ▶ Apply Holds for Orders and/or Credits by Customer
- ▶ Apply Holds on Back Orders
- ▶ Authorise to remove Holds

Sales Invoice and Credit Note Management

- ▶ Hold or Approve Invoices
- ▶ Invoice Change and/or Approval
- ▶ Add, Change, Delete Sales Charges
- ▶ Process Invoices, Credits, and Debits and post all integration details
- ▶ Print Pro-Forma Invoices
- ▶ Create Periodic, Daily, Weekly, Monthly Invoices based on Customer preferences
- ▶ Generate all necessary documents, Invoices, Credits, Debits, and Miscellaneous Billings
- ▶ Create EDI ready Invoice, Credit and Debit structures
- ▶ Define EDI generation requirements by Order Type, i.e. Invoices, Credits, Debits
- ▶ Invoice only when POD details have been received/entered
- ▶ Proof Of Delivery Recording with Auto Credit or Debit option based on discrepancies
- ▶ Full Document Reprint Capability
- ▶ Credit, Debit Note Creation based on Original Order, Invoice, Line Details and Values with or without Charges/Retentions
- ▶ Home and Export Invoices, Debit Notes, Miscellaneous Billings and Credit Notes

Sales Commission Management

- ▶ Flexible Commission Structures
- ▶ Ability to define Group Agent/Sub Agent/Sales Representative relationships for Commission allocations
- ▶ Ability to define flexible Commission Rates by Part, Category, Customer etc
- ▶ Multiple Commission Payment Mechanisms – via Accounts Payable, Registered Invoice, via a Credit Note, via an Invoice Deduction or Manually
- ▶ Ability to Calculate Commissions on Credit and Debit Notes
- ▶ Ability to determine upon what the Commission is Calculated; Order, Invoice, Before or After Discount, on Credit Notes and Debit Notes

Freight Cost Calculation

- ▶ Define Carriers as Vendors with or without any delivery restrictions
- ▶ Define Carriers as enabling Freight Costs to be calculated based on Weight or Volume
- ▶ All Freight Costs calculated are appropriately accounted for
- ▶ Ability to automatically create either Purchase Requisitions, Purchase Orders or Receipted

- ▶ Define Carrier Weight and/or Volume matrices

Purchase Orders to aid in the matching of 3rd Party Haulier Invoices

Customer Returns Management

- ▶ Returns Entry, Print, Change
- ▶ Option to link Return to original Sales Order details
- ▶ Returns Authorisation
- ▶ Returns Uplift Documentation and Returns 'Receiving'

- ▶ Returns Generate Accruals
- ▶ Returns Activity Processing, Credit Note Creation (full/partial), close for Crediting Activity, Close for Receiving Activity
- ▶ Quick Returns Facility for Retail industry

Selling Price Review Management

- ▶ Price Lists, base and non-base currency
- ▶ All Pricing details effectivity dated
- ▶ Override Prices, Discounts, and Price Lists by the use of Advanced Pricing and Discounting
- ▶ Selling Price Review based on Manufacturing Cost Change Simulation, showing margin impacts of new costs

- ▶ Selling Price Review based on Effectivity Dates, showing effects of proposed new prices on business
- ▶ Selling Price Review based on Customer Defined Date

Advanced Pricing, Discounting and Mark Ups

- ▶ Pricing, Discounting and Mark Ups are fully automatic with full manual override where authorised
- ▶ Multiple Prices List – Multi Currency, Date Effective, Multiple Products, Units of Measure and related optional Pack/Container Pricing
- ▶ Quantity Break Pricing
- ▶ Product Family Pricing
- ▶ Whole Order Pricing – In total, by Exception, by Category
- ▶ Base Currency Price Lists on Non Base Currency Orders based on convertibility
- ▶ Currency Price Lists on Base Currency Orders based on convertibility
- ▶ Multiple Discounts – Exclusive, Cascading, Deduction
- ▶ Discount Types – New Price List, New Price, Discount Percentage, Discount Amount or Combination
- ▶ Discounts can apply to Customers, Parts, Customer and/or Part Categories, Delivery Locations and Multiple combinations of these details

- ▶ Flexible Date Effective Discount Policy
- ▶ Discount Tracking
- ▶ What If Scenarios
- ▶ Retrospective Rebate Accruals
- ▶ Unlimited Combinations of all of the above
- ▶ Accrue for but do not apply to Invoice
- ▶ Quantity free processing, buy 50 get 2 free
- ▶ Price List Same As Except with or without changes
- ▶ Global Price List Change facilities
- ▶ Global Price List Replacement Facilities for Customer
- ▶ Enquiry by Inventory Centre and Part that displays Cost details, suggested Retail prices and the prices being charged on various price lists

Promotions and Multibuy

- ▶ Define Multibuy, what is free/discounted, what needs to be bought to qualify
- ▶ Define any Multibuy exclusions to make sure best sellers are left out of any promotion

- ▶ Define Multibuy as date effective
- ▶ Define whether order entry personnel are to be notified of any offers if qualifying products are ordered

- ▶ Manage BOGOF, buy 3 pay 2, buy 3 get % off the lowest, buy 6 get 10% and many more scenarios
- ▶ Define General Ledger posting effects for the tracking of all costs and revenue
- ▶ Define Multibuy Groups so all products in a particular product family/families are eligible

Margin Management

- ▶ Define Target and Minimum Margins
- ▶ Define Minimum acceptable prices
- ▶ Define actions if products do not meet minimum margin requirements, reject, hold or enables manual override
- ▶ Define optionally what Customer subsets and/or Product subsets are to be margin managed
- ▶ Track any user margin overrides for subsequent analysis

Sales Order Charges

- ▶ Apply Special Charges to Orders or Order Lines from predetermined Special Charges or enter the Charge details during the Order Entry process
- ▶ Charges can be defined in Currency, whether Taxable, as Percentages or Amounts, whether to Print on the Invoice, to utilise the Full Order or Order Line Value or the Discountable Value, whether they are Memo or True Charges to be passed on to the Customer, whether to be posted to General Ledger, whether to be Pro-Rated across Order Lines, based on Volumes or Value
- ▶ Header Charges can be Percentages or Amounts of the Gross or Net Order Value
- ▶ Line Charges can be applied as Percentages of the Gross or Net Value of the Order Line, or Once per Base Unit of Measure of the Part being Shipped thus allowing the recovery of surcharges, commodity price movements etc. without affecting the Part Price as indicated to your Customers
- ▶ Default previously defined Customer, Customer Location Charges at Order Entry Time
- ▶ Charges can be applied to Orders, Debit Notes, Credit Notes etc

Sales Order Notes and Comments

- ▶ Communication during the Order Processing Cycle is improved between Order Administration, Credit Approval and Shipping and Invoicing Departments
- ▶ Standard Notes can be created in any language
- ▶ Define Standard Notes and choose whether these Standard Notes are to print i.e. on the Acknowledgement Print, Pick List, Despatch, Invoice etc.
- ▶ Attach Standard Notes to Customers, Parts, Order Types, which enables these Notes to be defaulted automatically during the Order Entry Process
- ▶ Create One Time Note details at Order Entry for the Order and/or for each Line
- ▶ Create Shipping, Delivery and/or Packing Instructions/Notes on a Customer or Customer Delivery Location basis which can be automatically incorporated into the Order set and thus be subject to change on an Order by Order basis
- ▶ Create Country Code Declarations or Notes in the relevant Language Codes which can then default into the Order set and be changed during the Order Processing Cycle
- ▶ Create Letter of Credit, Import License, Terms of Delivery, Packing and/or Miscellaneous Text Notes which can be incorporated into the Order Set and thus be changed during the Sales Order Processing Cycle

Ordering Products with Variants

- ▶ Typically Make to Order
- ▶ Products with Variants where Customers choose the option for each Variant
- ▶ Work Orders will include the selected options for each Variant
- ▶ On Work Order Receipts, goods will be automatically Hard Allocated to the Sales Order

- ▶ Options for each Variant presented at Order Entry time
- ▶ Sales orders will be automatically back to backed with a Works Order

Line

Sales Kits

- ▶ Define Parts as 'Sold as Kits'
- ▶ Build Kit using Bill of Material
- ▶ Build Kits with Variants
- ▶ Order Kit, with Variants if applicable
- ▶ Automatically generate and release a Back to Back Works Order
- ▶ If Work Order fully issued then automatically Receipt Works Order and Hard Allocate Stock to Sales Order
- ▶ At Shipments time any shortages, be they whole kits or components from within kits, will be back ordered

Telesales and Delivery Management

- ▶ Telesales Calendar definition and generation
- ▶ Telesales Reporting
- ▶ Telesales Order Entry Based on Calling Patterns and Calendars
- ▶ Telesales Messaging by Customer, Company, Product and Combinations
- ▶ Warning messages if this is the first time the product is ordered
- ▶ Telesales Session Statistics, Calls Made, Orders Taken, Reason Code Analysis
- ▶ Delivery Calendar(s) definition and generation
- ▶ Automatic defaulting of next delivery date to Customer at Order Entry
- ▶ Assign Customers to Telesales Calling Pattern
- ▶ Assign Customers to Delivery Calendar Pattern

Pack/Container Product Management

- ▶ Sell same Part in Multiple Pack/Container sizes with/without Pricing differentials
- ▶ Define Pack/Container Structures
- ▶ Define Part/Pack Container availability details
- ▶ Backflush Pack/Container structure details at Product Shipment confirmation
- ▶ Track Pack/Containers to and from Customers
- ▶ Pack/Container Returns Tracking

Customer Call Service Management

- ▶ Enter, Change and Print, Complaints, Enquiries and Suggestions
- ▶ Define Actions to be carried out, by who and when
- ▶ Define Responses to Actions, carried out by who and when
- ▶ Print Customer Acknowledgement documents
- ▶ Full historical analysis of complaints by Customer, Part, Reason Code etc

Market Availability and Substitution Management

- ▶ Determine Market Availability policy, Inclusion or Exclusion
- ▶ Define what Parts a Customer/Market can have
- ▶ Define what Parts a Customer/Market cannot have
- ▶ Define if Overrides are possible and password security required
- ▶ Define what can be substituted by what, when and for how long
- ▶ Treat Stock as Zero for Stock Preservation and automatic substitution
- ▶ Option for User to select what to substitute with

Customer Management

- ▶ Multiple Delivery Addresses
- ▶ Utilise Post Code Address lookup for Customer setup
- ▶ Invoice, Statement and Alternative Addresses
- ▶ Assign Credit Manager, for control
- ▶ Customers can be part of a Group Customer for Credit Checking purposes
- ▶ Extensive analysis codes, both System and User definable
- ▶ Contracts for Quantity and Value
- ▶ Contracts for Product, Quantity, Value and Discounts
- ▶ Contracts are all Date Effective, and can be exchange rate locked
- ▶ Contracts can be for Immediate Invoices with Shipments to follow when called off
- ▶ Budgets by Customer, and/or Product, Quantity and Value
- ▶ Service Level Analysis, on time, 100% Quantity, met Customer Requirements, our own promises
- ▶ Customer and Market Cross References
- ▶ Fast Track Customer creation process
- ▶ Customer and/or Customer Part General Ledger Account overrides for Cost of Sales and Revenue
- ▶ Define default Locations and Status for immediate shipment orders
- ▶ Extensive Customer Enquiry/Reporting facilities
- ▶ Indicate if a Customer PO is mandatory – by Customer
- ▶ Predefine Customer PO's with effectivity dates to auto copy into Order Entry
- ▶ Ability to view Margin based on Standard, Last, Average and Actual Cost

Customer Subsets

- ▶ Define a group of related or unrelated Customers within a Customer subset
- ▶ Flexible selection criteria to create the subset Customer
- ▶ Customer subsets can be at the Bill To/Ship To or any user defined manner
- ▶ Select from 70+ data items for inclusion/exclusion from a Customer subset
- ▶ Use Customer subsets for margin management and more.

Credit Management

- ▶ Group Customer or Bill to Customer Credit Checking
- ▶ Apply Credit Checking if required
- ▶ Multiple and Complementary Methods:
- ▶ By Order Value vs. Credit plus Receivables and Open Order Value
- ▶ By Nominated Aging Period or Older
- ▶ By Nominated Aging Period or Older over a value
- ▶ By Order Value > Defined Value
- ▶ By Order Value vs. Credit Limit compared with Receivables Only
- ▶ By Order Value vs. Credit Limit compared with Open Order Value Only
- ▶ Assign Similar Customers to Credit Groups for common processing and ease of maintenance
- ▶ Credit Check applied at Order Entry and Shipping Points
- ▶ Nominate Customer as paying by Credit Card

Recurring Standard Orders

- ▶ Set a Customer up to receive a Recurring Standard Order (RSO)
- ▶ On the RSO determine the frequency for Delivery
- ▶ Optionally determine if Authorisation is required on every Order, on the the first, event nth etc
- ▶ Determine if Part is chargeable and who pays for it, based on relationships created at the Ship-To level
- ▶ Determine whether or not the part is to be Stock Checked prior to creating the next Order/Delivery
- ▶ Based on the Stock Check Qty, the system will calculate the Order Qty
- ▶ Ability to create the Initial delivery and ad hoc orders the fall outside the regular delivery cycle
- ▶ Auto creation of a Sales Order from the RSO
- ▶ Attachments can be made for the RSO

Delivery Options

- ▶ Define Delivery options available by Carrier/Delivery Location e.g. Next Day, Saturday a.m., 3-5 days, mainland UK, except Scottish Highlands, Northern Ireland and Isle of Man, and so on
- ▶ Define cut off time for Order Entry after which delivery progresses by 1 day
- ▶ Define the cost for the option
- ▶ Define the pricing options based on Order Value
- ▶ Define any Carrier lead times
- ▶ Define any internal work times required
- ▶ Define the Cost for the option
- ▶ Does Delivery Option apply to Back Orders
- ▶ Option to auto-generate e-mails based on Back Order release

Back Order Management

- ▶ Determine if and when Back Orders are created
- ▶ Determine if Back Orders are automatically Held
- ▶ Use Back Order Workbench to manage Back Orders
- ▶ Options to release whole Back Orders or individual lines based upon current stock position

Short Allocation Management

- ▶ Short Allocation/Short Shipment Management
- ▶ Manage Short allocations/shipments using the Short Orders Workbench
- ▶ Proactively notify customers of shortages, via e-mail either at time of short allocation or short shipment
- ▶ Content of generated e-mails is under user control

Proof of Delivery

- ▶ Optionally record Proof of Delivery details, plus any Discrepancies
- ▶ Auto generate Credit or Debit Note options
- ▶ Determine if Customer can only be invoiced once POD arrives
- ▶ Determine if Sales Invoice will reflect any POD Discrepancies
- ▶ Various Invoice on POD options
 - Do not use
 - Traditional
 - Auto Credit Discrepancy
 - Auto Credit Reversal
- ▶ Optionally Adjust Stock, based on POD Discrepancy

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