

Sales Orders

Greentree®
BUSINESS-BUILDING SOLUTIONS

"very, very, responsive!"

By automatically allocating inventory to orders as they are entered, inventory levels and reordering requirements are controlled more effectively and you can focus on continually improving your customer service levels. On-screen management of customer credit and inventory backordering also ensures your potential for lost revenue is minimised. Requests for quotations and proforma invoices can be generated for particular customers and printed directly from the order entry form.

No	Time	Tax	Account Code	Transaction	Description	Location	UOM	Price Book	Quantity	Price	Disc	Amt
2	IN		CRU700	ARINV	CRUSHMASTER 7			RETAIL	4.0000	69800.0000	10.00	31200.00
3	IN		CRU700	ARINV	CRUSHMASTER 7			RETAIL	0.0000	0.0000	10.00	0.00

Key Benefits

Internet Enabled

Greentree is enabled for Internet deployment, out of the box, using its thin client technology. This allows remote offices or travelling executives to obtain secure access to the complete functionality of Greentree via an Internet Service Provider.

Fully Integrated Operation

The Sales Orders module is fully integrated with the Inventory and Accounts Receivable modules to ensure your customer and inventory availability information is always up to date. This also means that customer and inventory item discounts or special pricing arrangements are automatically detected and applied, with no costly mistakes.

Greentree's multi-location inventory capability means that you can easily select the location to ship each order from. If insufficient inventory is available in the desired location, the user will be prompted with the option to select another location, oversell if permitted, create a back order or factory order, or raise a purchase order on the supplier.

Easy Access to Accurate Information

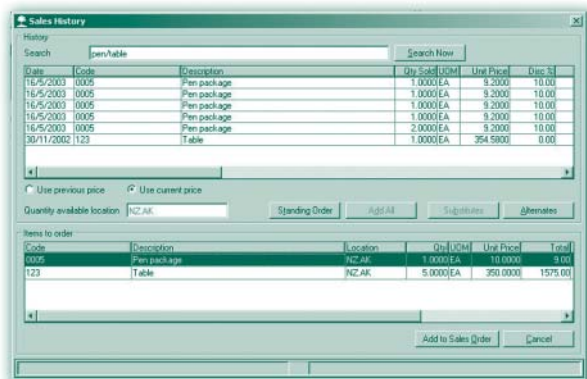
With customers waiting for an immediate response to queries, efficient access to information is important. Greentree provides a powerful on-screen order enquiry facility that allows you to find the

status of orders by a wide range of criteria. Orders, packing slips and invoices can then be easily “drilled down on” for viewing the complete details and status of each line.

During order entry, inventory items can be located using a wide range of selection criteria, including the item’s code, any word of the item’s description or any one of the alias codes or barcodes, as well as over 20 other criteria, ensuring staff are able to enter orders accurately and more quickly. You may also enquire on inventory availability and pricing for a specific customer. This takes into account any special pricing or discount structures that are in place, and can even determine the “best price” where multiple discount or pricing structures exist.

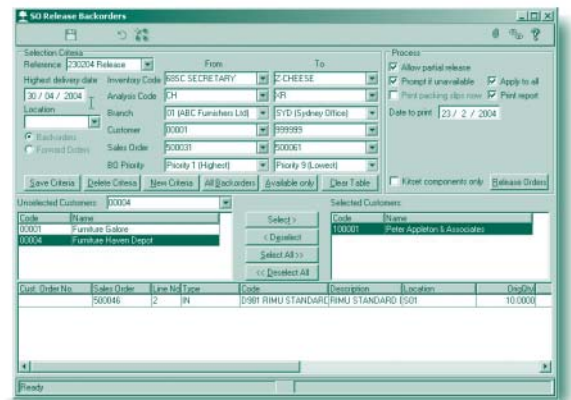
Sales and Price History

Your customer’s previous purchases can easily be displayed from within Sales order entry, even down to the selected inventory items, showing item, sale price, discount and date, plus other related information. This information can then be selected to automatically return the item, price and discount to the current sales order, considerably reducing data entry and enhancing customer service.



Back Orders

A comprehensive back order facility is available, allowing inventory that cannot be supplied immediately to be placed on back order as the sales order is entered. Customers may also be assigned a back order priority, ensuring your most important customers are supplied first when goods arrive.



Forward Orders

A full forward order facility is also available, allowing for inventory that is not required to be delivered immediately, to be placed on forward order as the sales order is entered, with an optional print form attached to enable the customer to be sent a confirmation document if required.

Effective Credit Control

Credit control is paramount in any sales organisation and Greentree provides a number of controls to assist this process. Individual customer credit limits may be defined (including overdue limits for each ageing period) and these are automatically checked as each order is entered. Where a credit alert is

detected, a warning may be issued or the order held and allowed to ship only when approved by the relevant accounts supervisor. This ensures your credit control procedures are followed, without costly mistakes or oversights.

Flexible Sales Orders, Packing Slips and Invoices

Multiple formats for Packing Slips, Invoices, Order Confirmations, Quotes, and other forms may be created as part of your sales order system, and can be customer specific. These are completely user defined and may be used on laser or traditional dot matrix printers. Naturally, your logo or any other relevant graphics may be used and a range of pre-printed stationery forms are available. Multiple orders may be combined onto a single packing slip, ensuring freight costs and paperwork are minimised, and multiple packing slips may also be combined onto a single invoice.

Extended text facilities are available, allowing you to print “standard” extended descriptions, specifications, or detailed notes that have been entered as part of the sales order process.

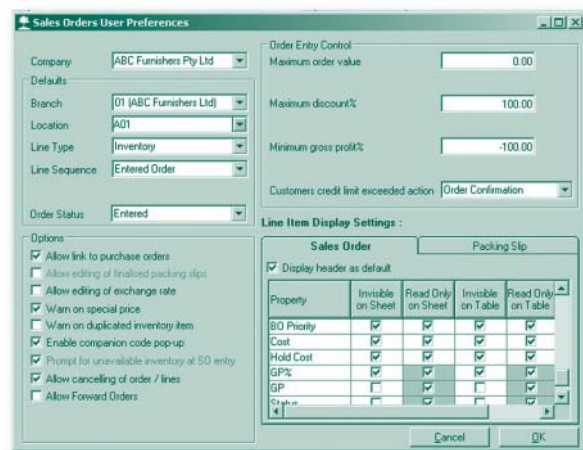
Order confirmations, packing slips or invoices may be “hot printed” directly to printer, fax or email from the Sales Order Entry screen. This ensures your orders can be processed quickly and with a minimal amount of paperwork or lost time. Greentree provides the ability to email or fax reports from within Greentree as standard, including sales orders.

Controlling the Sales Order Process

Sales orders may be placed “on hold” at the time of entry, or after initial entry with a user defined sales order status assigned. The effect on inventory may also be defined for each status so that inventory is committed or not committed to the sales order as the situation requires. For example, a status of “requires approval” could be defined to allow a supervisor to vet all or selected sales orders before these are processed and inventory is committed.

Managing Security

A sales order security profile can be defined for each user (or user group) to ensure that only relevant information is displayed for faster data entry, and that important values are not updated or changed in error. This means cost prices and gross margins may be displayed or hidden and selling prices or discounts can be set to read-only or editable. All of these options can be configured on a per-user basis for sales orders, as well as packing slips,



ensuring individual staff are empowered with the flexibility they need to provide an edge in customer service and sensitive information is protected.

Comprehensive Options

Miscellaneous charges, such as freight, can be entered when the order is taken or added after the packing slip has been printed. With up to 999 delivery addresses per customer, you are assured of being able to cope with almost any number of customer locations or delivery instructions. A single order may also have multiple delivery dates, with each of these monitored by the system for automatic release as required.

Standing Orders

Recurring or Standing Orders may be defined and automatically processed as often as you require. This ensures your regular customers can have their orders delivered on time and without the risk of these being overlooked. Cancelled orders are automatically tracked by the system, including the value and the reason. This helps you to measure the value of lost business - and inform your suppliers of the “cost” of a late shipment.

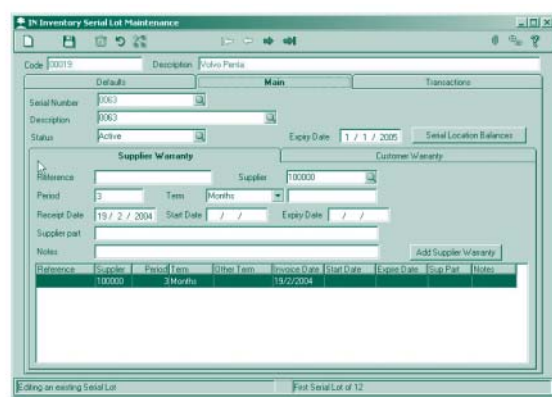
Related Modules

Foreign Currency

If the Foreign Currency module is being used, orders can be entered for overseas customers in their currency using prices from an international price list. A fixed exchange rate may be used at time of order entry, or the current exchange rate used at time of invoicing. Specialised forms such as order confirmations, packing slips, pro-forma invoices, and standards invoices may also be defined specifically for overseas customers.

Serial and Lot Tracking

Greentree’s serial and lot (batch) tracking functions provide you with greater accuracy in managing your inventory, with easy tracing options available to track down individual items. Serial or lot tracking may be implemented for just the items that require allocation. Expiry date management is provided to ensure that perishable items that have passed their “use by date” are not able to be sold.



Linked Purchase Orders

If the Purchase Orders module is being used, back orders may be linked directly to existing purchase orders, or the operator can choose to create a purchase order at the time of back order creation. This

allows “indent orders” to be effectively managed (i.e. where an item is not held in inventory, but ordered from a supplier as required.)

Supercessions

The Supercession module has been designed to complement the standard Greentree inventory functionality by allowing for the management of inventory where an existing item is replaced by one or multiple new items. User defined supercession rules determine the optional automatic transfer of inventory item static information, outstanding purchase or sales orders, as well as transaction history from the superceded item to its replacement.

Analytics

This reporting module harnesses the power of the extensive sales analysis data captured within Greentree and provides a dynamic and flexible reporting structure for reporting sales by a variety of filters, groups, sort sequences, and columns.

WebStore

The Greentree WebStore module allows you to publish your inventory to the web for customer self service enquiry and sales order entry and includes the following capabilities:

- User sensitive product details including customer specific pricing
- Configurable options to view inventory availability
- Online entry of sales orders with user specific support for back orders
- Sales order tracking with drill down to specific orders details
- Access to customer account balances with drill down to invoices and receipts
- Automatic packing slip printouts with optional email confirmation back to your customer
- Automatic processing of electronically received XML based sales orders



Data update from Microsoft Excel

Greentree allows the user to create both masterfiles and transactions from within Microsoft Excel. User security is respected, giving a totally secure flow of data from Microsoft Excel to Greentree. This can be used to load customer details from legacy systems as well as process sales orders from Excel templates.

Advanced Security

Greentree's Advanced Security module lets you control exactly which Customers, Suppliers and General Ledger accounts that a user can access. You can also control each user's ability to add, change, or delete as separate security options. For example, a user can be set to view, add or change only those customer's accounts and transactions that relate to their business division, however may not delete transactions at all (requiring a supervisor to delete an incorrectly entered invoice). Advanced Security applies to General Ledger, Accounts Receivable, Accounts Payable, Cash Management, Sales Orders, and Purchase Orders.

Workflow Designer

This module provides the ability to define user specific "Workflow desktops" which includes Financial and Sales Order Status, Bookmarks, Favourites, and Global Attachments. Special sales order and packing slip desktop objects are available to immediately notify appropriate staff on receipt of a sales order. This can then be drilled into for further detail or approval. Attachments can be of any document format, including Microsoft Word, Excel, or Adobe PDF and linked to any sales order or inventory item and recalled at any time. This could even include a scanned copy of the customer's signed order.

