

Sales Order

The success of your business depends on keeping your customers happy. You need to fill their orders promptly and answer their questions quickly. You need to be able to handle picking, packing, shipping, and tracking. The Sales Order application gives you the means to do that. You'll also benefit from efficient billing and cash receipts management.

Fill orders promptly without losing track of commitments you made or terms you agreed upon. Backorder information is right at your fingertips so you will know exactly what is backordered and when it will ship.

Make an entry once and the system will produce a picking slip, an invoice, and, if needed, a backorder. With the recurring orders feature, you'll never have to re-enter standing orders or scheduled shipment orders. System defaults and quick entry make transaction entry fast and efficient.

Use Return Merchandise Authorizations (RMAs) to record a return of items from your customers and to track it from authorization, through receipt of the goods at your location, through an optional approval process, and ultimately to the return of the goods to stock or a write-off of the cost.

The screenshot displays the OSAS Sales Order application window for a Return Merchandise Authorization (RMA). The window title is "Commands Edit Modes Other Information Help". The interface includes a menu bar with icons for navigation and a toolbar with "OK" and "Abandon" buttons. The main form is divided into several sections:

- Batch ID:** 000001
- Our Order No:** 00000021
- Date:** 05/28/2014
- Status:** New RMA
- Loc ID:** MN0001
- Sold to:** ACE001
ACE BUILDERS
1588 SE 31ST STREET
PADUCAH KY 28655-7865 US
- Ship to:** 000001
Bill Meyers
Receiving
1588 SE 31st Street
Paducah KY 28655 US
- Sales Rep 1:** GPD, Percent: 100.0
- Sales Rep 2:** Percent: 0
- Cust Level:** ACE001
- Terms Code:** 2PCT
- Terms Desc:** 2/10,n/30, Type: Reg
- Terms%:** 2.00, Days: 10, Net Days: 30
- RMA No:** 9786757246
- RMA Date:** 05/28/2014
- Inv No:** 1624375, Date: 05/28/2014
- Ship Method:** FED2
- Ship Via:** Federal Exp 2nd-Day
- Pick Slip No.:** 976431
- Requested Ship Date:** 05/28/2014
- Actual Ship Date:** 05/28/2014
- GL Pd/Year:** 05/2014
- Taxable?:**
- Tax Group:** MN
- Description:** Minnesota

Use Return Merchandise Authorizations to track returned items from authorization all the way to the return of the goods to stock.

Reduce order complexity by using the Blanket Orders capability to create large, contracted orders with your customers whereby the shipments are scheduled.

Achieve a fine level of cost-calculating and sales tracking by assigning lot numbers. Identify which customers made purchases from a specific lot and when they were shipped.

Sales Order Offers Choices and Flexibility with These Key Features

- Produce picking slips for your warehouse employees to tell them which items to ship from stock or use it to verify quantities shipped and/or backordered. Print Packing Lists to ship with the order.
- Describe services rendered or other descriptive information on products by referencing additional line-item descriptions of up to ten lines. This is especially helpful to service and build-to-order businesses.
- Produce a professional quote for a client and convert that quote to an order upon client approval. All you have to do is change the status of the order from “quote” to “new.”
- Gain full control of your pricing. A price matrix allows you to set prices by a combination of customer codes and/or inventory codes. Define pricing as a discount from list or as a markup from cost. Prices can be set by customer level for each item for columnar pricing, or for a specific customer or group of customers for a group of items. Almost any combination of pricing is available; you decide which works best for you.
- Discount any line item by amount or percentage and print the discount on the invoice.
- Enjoy easy and efficient order entry with quick entry and defaults on headers.
- Save data entry time by using the recurring orders feature when you process your billings. If a customer places the same order each month, you only need to enter the information the first time.
- Multiple locations per order let you sell items from any warehouse that has available inventory. Selecting the location closest to the customer can save on shipping costs. Also, the customer will receive one invoice regardless of how many warehouses were used to fill the order.
- Offer special promotional pricing by letting the software track those promotions for you. Use promotional pricing in addition to or instead of other discounts. A full screen of selection criteria allows you to customize your promotions. When the promotion is over, normal pricing will resume.
- Eliminate “down time” with batch processing. Your staff can enter orders under one batch ID while another batch of orders is being processed and posted.
- Enter or edit invoices and credit memos and view invoices with transaction processing from a single menu.
- Access shipment tracking information via your web browser.
- Print a Bill of Lading, a legal shipping document that is required by law for the transportation of certain types of freight.
- You can use the drill-down features in General Ledger to simplify the process of linking GL transactions to the sales line-items, invoice totals, and cash receipt transactions that generated them. This powerful capability provides a complete audit trail for sales and payment transactions.
- You can produce invoices for your customers using any of the traditional printed formats, or you can choose to deliver the forms via e-mail, or by fax using the Metrofax service.
- Print invoices, picking slips, packing lists, and bills of lading in graphical, plain-paper format

Sales Order Reports

Open Orders

Recurring Order List

Backorder Allocations