

# AXIS Diplomat

## Sales Order Processing

*The AXIS Diplomat 2006 Sales Order Processing module provides a comprehensive and effective method of controlling the activity in a busy Sales Office, as well as providing a valuable production/despatch tool. In addition to providing the tools to manage the processing of sales orders, together with the subsequent invoice generation, it also provides quotation facilities, with the ability to convert quotations to sales orders at a later stage.*

Details of your customer's orders are entered as soon as you receive them. The software is also designed to ease the entry of orders directly into the system whilst the customer is on the phone. Once orders have been fulfilled, invoices can be automatically created with little or no further data entry.

Entering sales information onto the system at receipt time involves virtually no overhead over and above the entering of invoices and yet provides a number of benefits, including

- ◆ production of order acknowledgements, packing notes, delivery notes and a variety of other order-related documentation
- ◆ analysis reports, including outstanding order valuations, orders by due date and monthly order book analysis
- ◆ automation of the invoice generation procedure

When a sales order is entered, any stock items on the order are allocated. The free stock figures for those items are thereby reduced, reflecting the sales order allocations. The stock on hand figures are not reduced, however, until the order is released, and an invoice generated. This means that, at any point in time, it is possible to see both the physical stock level of an item (i.e. the stock on hand) and the free

stock (i.e. the physical stock less that allocated to orders).

A stock allocation does not physically reserve stock items for specific sales orders and you still have the flexibility to sell allocated stock to others. The free stock figure does, however, provide a warning mechanism that stock is being over-allocated.

This means that, in addition to helping with the operation of the sales and dispatch departments, the Sales Order Processing module also provides a valuable tool for the control of stock. Stock Under Minimum reports can, for example, be based on the Free Stock figure, rather than the Stock on Hand figure. This gives a warning when stock levels have dropped too low because of orders due to be sent out, rather than waiting until orders have been shipped.



## Quotations

In addition to the obvious advantages of entering quotations onto the system (such as immediate access by other members of staff, documentation production, etc.), entering quotations can also help reduce errors and the time to subsequently enter orders received against quotations.

Any existing Quotation may be converted to an Order. Additional information relevant to a Sales Order (such as customer order number) will be required, but the main information will be copied from the Quotation.

Entering a quotation does not affect the stock ledger in any way.

## Sales Order Documents

A number of documents may be printed from sales orders and quotations, to aid in internal processing and to provide information to customers.

These documents include Order Acknowledgements, Pro Forma Invoices (from quotations or sales orders), Advice/Packing Notes and Delivery Notes.

## Invoice Generation

The action of “releasing” a sales order performs three functions - firstly, it tells the system that the order (or part of the order) has been shipped, secondly, it issues the stock (whilst removing the corresponding allocations) and, thirdly, it generates the invoice.

Orders may be released individually, where the operator specifies the order lines that have been shipped (or part shipped), or in their entirety, in groups.

For more information, please contact Axis First or visit our web site:

## Related Modules

In addition to the standard Sales Order Processing module described above, there are a number of other modules that enhance order processing further.

The Goods On Account module allows orders to be released without generating an invoice. Instead, Goods on Account bookings are created, which can be used at a later stage to generate the invoice. This has several applications; including invoice deferral and the consolidation of orders, where one invoice can be sent for a number of orders or deliveries.

The Despatch Recording module allows you to specify quantities to be despatched in addition to specifying the quantities ordered. This allows you to manually or automatically distribute a limited amount of stock between a number of sales orders, deciding how much stock to allocate to the various outstanding orders for those items.

The Mail Order Processing module adds onto the Sales Order Processing module and is designed for use in a busy telesales environment, potentially dealing with retail mail order sales. It provides instant Customer Account creation, with address details retrieved from a postcode database, as part of the Sales Order Entry mechanism and it also provides real-time credit /debit card authorisation facilities.

Sales Order Processing Kits allows you to define some of the products that you sell as kits of parts; the invoice will show a single line for the kit but the Advice/Packing Note (or Pick List) will show the components; the selling price is determined by the kit, but the costs are derived by the components. In addition, the allocations are made against the components and not against the kit.

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