



# Sage BusinessWorks Accounting

## Order Entry

When it comes to selling, it helps to have as much information about the customer and your products as possible. With the Order Entry module for Sage BusinessWorks Accounting, your company's sales staff can easily access a variety of useful customer information, including past purchase histories, shipping addresses, credit card information, and much more. In addition, Order Entry can be set up to alert your sales staff when a customer exceeds a credit limit. A hold can then be put on the order until the customer's standing with your organization improves. All this while processing quotes, sales orders, and invoices! Simply put, Sage BusinessWorks Order Entry can increase sales efficiency and, in turn, lead to greater success.

When you integrate Order Entry with the Inventory Control module, Sage BusinessWorks becomes a complete distribution solution. Your staff has the ability to view the status of parts, including the on-hand, on-order, and committed quantities. With all this information at their fingertips, your sales force can more effectively close deals—leading to increased profitability. Plus, if there isn't a sufficient quantity on hand, the software recommends a substitute. It even displays a picture of the part or item for improved order accuracy.

**Note:** *The Accounts Receivable module is required when using Order Entry, and the Inventory Control module is strongly recommended.*

Inv #	Customer	Invoice Information	Price Cost	Profit Margin
*** Customer ID, ETC ***				
538	ETC	Inv date: 06/30/10 Ord date:	Rep: 1 Order #:	
		Item / Description	SA Qty Unit Price	Price Cost Profit Margin
		1001 26 inch bicycle, boy's	2 10 207.95	2079.50 1367.00 65.7%
		LABOR Labor Costs	2 15000 75.00	1125.00 750.00 66.7%
				375.00
		Invoice totals		3204.50 2117.00 66.1%
560	ETC	Inv date: 06/10/10 Ord date:	Rep: 1 Order #:	
		Item / Description	SA Qty Unit Price	Price Cost Profit Margin
		1001 26 inch bicycle, boy's	2 1 1000000.99	1000000.99 999929.74 100.0%
		396-1030 Tire, 20 inch	2 1 8000000.25	8000000.25 7999997.16 100.0%
				3.09 100.0%
		Invoice totals		9000001.24 8999926.90 100.0%
				74.34

## SPECIFICATIONS (MAXIMUM LIMITS)

Maximum amount per quote, order or invoice \$9,999,999.99

## MAXIMUM NUMBER OF:

Total quotes per customer 3,000\*  
 Total orders per customer 6,000\*  
 Total invoices per customer 12,000\*  
 Kits 50,000  
 Line items in a kit Unlimited\*\*  
 Ship-to addresses per customer 500

## NUMBER OF:

Line items per quote, order, or invoice Unlimited\*\*  
 Sales accounts per quote, order, or invoice 999  
 Sales taxes per quote, order, or invoice 3  
 Characters in invoice description 20  
 Months to keep detail 60

## REPORTS

- Back Order Fill
- Back Order
- Business Graphics
- Credit Memo
- Flash Report
- Gross Profit
- Invoice Detail
- Invoice
- Kit Orders List
- On-Order
- Order Selection
- Packing List
- Part Back Order
- Pick Ticket
- Quote
- Quote
- Return Invoice
- Return Part
- Sales Analysis
- Sales Order
- Sales Order
- Ship-to Address List

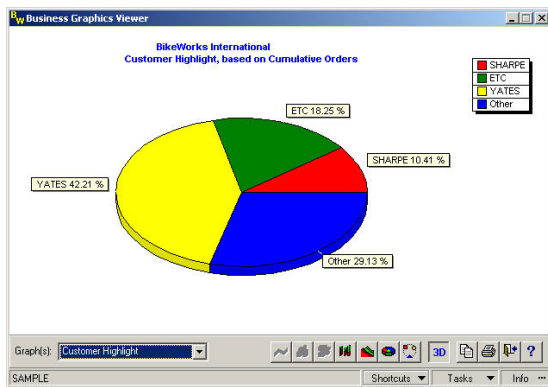
\*Specifications denoted with an asterisk (\*) are practical limits. They are to be used as guidelines only and do not necessarily reflect the actual limitation. Individual requirements may vary based on the system you are using.

\*\*Limited only by disk space



## General features

- Lets you easily add new customers and parts on the fly during quote, sales order, and invoice entry.
- Provides a gross profit report that can be based on paid invoices and used as a commission report.
- Quickly locates customers, parts, quotes, orders, and invoices with flexible search features—increasing sales efficiency.
- Sorts reports by customer, part, product line, or sales order number.
- Finds orders and invoices using the customer's purchase order number.



- **Order Entry Business Graphics** Stay informed with Order Entry Business Graphics reports. Sage BusinessWorks graphs and charts can be customized to provide you with a high-level view of your organization. You can even send reports using e-mail for efficient distribution of important information.

## Maintenance Features

- Lets you easily look up a customer's part purchase history while entering quotes, sales orders, and invoices.
- Alerts you when a customer's credit limit has been exceeded. Furthermore, Order Entry allows sales orders to be automatically placed on hold, so you can immediately stop further shipments while the customer improves his standing with you.
- Tracks sales by customer, part, product line, and sales representative.
- Maintains a template of parts, labor, and comments that normally appear together on a quote, sales order, or invoice.
- Imports ship-to addresses to aid in setting up and maintaining your database.

## Processing Features

- Generates quotes for customers and tracks the probability of the quote being converted into an order.
- Customer Specific Pricing matrices allow quick, accurate entry of quotes, orders, and invoices for customers on contract pricing.
- Quotes, sales orders, and invoices can be copied from another customer for rapid data entry—saving you time and effort.
- Easily exports and imports quotes and sales orders between two “disconnected” Sage BusinessWorks sites, such as a laptop user in the field and a main office.
- Converts quotes to sales orders or invoices as well as sales orders to invoices instantly.
- Provides online or batch printing of quotes, sales orders, and invoices.
- Distributes quotes, sales orders, and invoices by e-mail, maximizing sales opportunities and reducing postage and preprinted forms costs.
- Optionally prints invoices without the prices or with extended prices so they can be used as packing lists.
- Customizes and prints pick tickets and packing lists to help your staff quickly and easily assemble and ship the orders you've entered.
- Handles modifications of ship-to addresses while entering quotes, sales orders, and invoices so ship-to addresses are always up to date.
- Easily locates quotes, orders, or invoices based on ship-to addresses in the quote, order, or invoice inquiry options.
- Recommends substitutions for out-of-stock items and allows you to select these substitute parts easily while processing quotes, orders, and invoices so your shipments won't have to wait when a part is unavailable.
- Allows calculated sales tax amounts to be overridden during quote, order, or invoice entry.
- Allows comments, miscellaneous charges, and labor charges to appear on quotes, sales orders, and invoices.
- Accepts payments and deposits at the time of sales order or invoice entry.
- Allows prepaid sales orders.
- Optionally selects sales orders to be automatically invoiced by release date.
- Allows partial shipment of sales orders so you can begin invoicing customers at the earliest opportunity.
- Processes returns to inventory and returns damaged merchandise without returning it to inventory.
- Integrates seamlessly with StarShip shipping manifest system, which calculates freight charges (based on the parts' weight maintained in the Inventory Control module) and prints carrier-approved, bar-coded shipping labels and COD tags.

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