



## Order Entry / Invoicing

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CONTROL Order Entry / Invoicing is comprehensive yet simple-to-use, with minimal keystrokes required for any operation and offers a full range of Order Entry / Invoicing transactions including:

- Customer Orders
- Invoicing
- Cash Sales
- Returns and Credit Notes
- Quotations

The Order Entry / Invoicing module integrates fully with the Inventory Management, Accounts Receivable, Accounts Payable, Replenishment and General Ledger modules.

The CONTROL Order Entry / Invoicing module includes:

- Customer and Item Selection
- Customer Order Entry
- Sales on Credit
- Item Price and Discount Control
- Enquiry Facilities
- Special Product Types
- Multi-store or multiple stock location/type facilities
- Delivery details
- Returns
- Printing
- Quotations

## Customer and Item Selection

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- Customers can be selected by customer phone number, mobile number, name, license number, customer code, etc.
- Items can be selected by barcode, product code, description, supplier's product code, supplier, etc.
- Partial field search/match facilities are available on all the above fields.
- All these facilities eliminate the need to remember codes.

## Customer Order Entry

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- To reduce training requirements and operator errors, customer order and repair entry is very similar to sales entry.
- Additional details that need to be recorded for a customer order and/or repair (e.g. condition of item being repaired, any accessories attached, etc) can be completely configured without any programming.
- CONTROL will calculate a default order completion date, which can be altered if required.
- When not able to supply complete order, automatic generation of a back order for those customers that accept them.
- Ability to set a minimum invoice value for a partial deliveries so that account servicing costs are controlled.
- Optional automatic or semi-automatic matching of stock received to outstanding customer orders.
- Supplier purchase orders may be produced automatically to fill customer orders for non-stocked items - and then referenced to the customer on receipt - simplifying advising the customer.
- The status of customer and repair orders can be maintained, queried and reported on.
- Supplier purchase orders or inter-store transfer requests may be generated to fill customer orders - notification of outstanding customer orders waiting for the goods as they are received into stock..

## Sales on Credit

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- A customer's credit status is checked as the customer's account is selected and as each line is entered.
- Depending on company policy, customer orders may be including the credit calculations.

## Item Price and Discount Control

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CONTROL will select the correct price for each item being sold, taking into account various factors as follows:

- any promotional price and the date when it comes into effect and when the promotion is over;
- Prices and/or discounts based on product group and/or customer group;
- quantity being purchased;
- a current quote or contract price for this customer.

Operator initiated discounts and price overrides, either on a per line or whole transaction basis can be controlled as follows:

- A discount beyond an individual operators limit (which may be zero) requires the entry of an authorised person's password.
- An operator may be forced to enter a discount reason for any operator initiated discount or price override.
- A maximum discount can be set per product and minimum allowable gross profit percentage can be

## Enquiry facilities within Order Entry / Invoicing

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- Stock availability in the current and other stock locations
- Detailed notes on products, e.g. warranty conditions, care instructions, etc.
- Associated products – other items in the family, spare parts, etc.
- Detailed notes on customers – can be updated as well
- Details of other orders for the selected customer

## Special Product Types

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- Full style, colour and size facilities
  - Full facilities for serial numbered stock or items required to be tracked individually or by batch.
  - Ability to sell product packages or kits made from other products on file, with the ability to substitute components.
  - A single stock item may be sold in multiple sizes and forms (eg, by the tonne, box, bag, or each), while maintaining accurate stock control.
  - Ability to sell a customised product by specifying a base product and then select from lists of possible attributes.
  - Services or generic products can be sold by entering a representative product code and then entering or modifying the product description and/or price.
  - Nomination of the type of stock, e.g. normal sale stock, demonstration stock, faulty stock, etc.
  - "Tallies" (consisting of a series of quantities by lengths OR a series of quantities by lengths by widths can be entered and the totals are automatically calculated. These tallies appear on the sales docket.
  - Offcuts handled.
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## Multi-store or multiple stock location/type facilities

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CONTROL can be configured to provide:

- Details of stock available in other stores and warehouses.
- Selection of another store or warehouse for fulfillment of one or more stock items
- Can process a transfer to another store or a warehouse, producing the required documentation.
- Can generate a transfer request on another store or a warehouse.
- Can receive stock sent from another store, a warehouse or from a supplier.

## Delivery Details

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- A delivery address, delivery method and special delivery instructions can be added for any sale or customer order where items are to be delivered.
- Multiple delivery addresses for a single account if required, with a single accounting location.
- The total weight and or size (volume) of a transaction can be calculated and displayed while the transaction is being entered.
- The operator can enter a delivery charge or CONTROL can suggest a delivery charge based on the delivery zone, the total weight or size of the items to be delivered, or a combination of these. This delivery charge can be modified by the operator.
- Customer address labels to go on the goods can be produced.

## Returns

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To process a return can be as simple as:

- enter the invoice number of the original sale
- provide a return reason code and additional return reason details if required
- review and possibly modify the details recalled from the original sale, including any special pricing or discounts that may have been given
- finalise the return

If the original sale number is not known, depending on company policy, a return can be processed without reference to the original sale transaction or easy-to-use search facilities are provided to find the original sale transaction by customer or by stock item.

Returns beyond an individual operator's limit (which may be zero) require the entry of an authorised person's password.

## Printing

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- There are a number of "standard" docket layouts, which can be highly customised to suit individual requirements.
  - Items on Picking Slips may be optionally sorted and printed by bin location, allowing easier and faster picking.
  - A two line sales message can be modified at any time.
  - Special notes can be pre-recorded and any one of these can be chosen to print on selected dockets. (e.g. for special warranty conditions, product care details, etc.)
  - All dockets can be printed on the one printer; or the docket style and printer used can be dependent on the type of the transaction
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## Quotations

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Full quotation system including the ability to convert a quotation into a customer order or a sale.

## Other Features

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- Notes can be added to individual transaction lines or to the overall transaction.
- The cost of sales of an item can be based on average cost, last cost, a pre-determined gross profit percentage per stock item or Department, or for special items, input while entering the transaction. These can be combined in one sale.
- Hundreds of configuration options allow the Order Entry / Invoicing module to be tailored to individual requirements without programming.