

## ORDER ENTRY AND INVOICING

The Order Entry and Invoicing module of IMAS handles all customer order processing from the original order to invoicing. You can call up details of any current order, backorder or forward order whenever you need to, and you can call up details of any customer or item. It can improve the efficiency of your order entry, warehouse and accounting personnel. It can also enhance your customer service, and help improve profitability.

The major features of Order Entry and Invoicing include:

### **Stock for Orders**

When an order is taken, the required stock is immediately and automatically allocated to the order. If an item is not in stock, the system offers operators a variety of options.

You can:

- Fill the order from one of your other warehouses.
- See whether the item is due in shortly.
- Substitute another item.
- Backorder.

### **Substitute items**

You can record a substitute for each item in your inventory. If there is insufficient stock for an ordered item, the operator can immediately suggest the substitute, or simply use it to fill the shortfall quantity. At the same time, the module records the total order quantity as demand for the item originally ordered.

### **Automatic Backordering**

You can set the system to generate backorders automatically for all short-shipped lines or for certain items and customers. Backorders and forward orders can be priced when they are entered or when they are released for processing.

### **Managing Forward Orders**

Forward orders can be entered as soon as they are received from customers and released for processing at the appropriate time.

### **Demand Recording**

IMAS records quantity ordered as well as quantity sold. You can record the sales you miss as well as the ones you make.

### **Cash Sales**

Cash Sales can be accommodated and are highlighted on audit reports.

### **Credit Checking**

If the order exceeds the customer's credit limit, a warning message is displayed.

### **Profit Checking**

You can set a range of acceptable profit percentages. Order Entry and Invoicing issues a warning message if the profit for a particular order line is not within the defined range.

### **Flexible Pricing**

An order can be priced in virtually any way you desire. Apart from standard list price, you can have special pricing for individual customers or the negotiated contract price. Apart from the standard list price, you can specify quantity break prices, discounts or mark-ups for any item. In addition, you can offer special pricing for individual customers and implement price according to negotiated contracts. You can use promotional pricing for a specified period.

### **Pricing Structure**

You can define an appropriate pricing method for individual customers and items. Plus, Order Entry and Invoicing determines the price for each order line. If necessary you can override: Unit price, Unit cost, Discount rate, Discount amount, Markup rate, and Markup amount.

### **Global Price Changes**

IMAS provides a single step procedure for changing the list price of a number of items.

### **Sales Commission**

A salesperson can be assigned to each customer for whom orders are processed. Commissionable sales are accumulated and commission is calculated for each salesperson.

### **Picking Slip**

Once the order is complete, a picking slip can be printed in the warehouse. The picking slip can be printed according to order line sequence, bin location, sequence or route sequence.

### **Production Invoices**

Invoices and credit notes can be printed for shipment with the goods or for posting to the customer.

### **Customer Terms**

Each customer can be assigned a settlement terms description, a period for which terms apply, and a terms discount that applies to payments received within the time specified by the terms period.

### **Electronic Orders and Invoices**

If you have the IMAS Utilities module installed you can accept electronic orders from your customers. You can also transmit invoices and credit notes electronically. (This saves time and paperwork, improves cash flow and leads to stronger customer relationships.)

### **Recalling Information**

You can call up details of customers and items including contract arrangements and promotions, even while you are entering orders.

### **Checking Customer Orders**

Current customer orders can be displayed on the screen at any time. Details of items ordered, pricing and likely date of availability can all be checked instantaneously. Invoices and picking slips can also be reprinted.

### **Units of Measure**

With IMAS you can use three different units of measure to hold, sell, and price your stock. For example, you can stock and sell copper wire by the meter, but price it by the kilogram. You can also sell and price items from broken packs.

### **Sales Tax**

IMAS provides six sales tax categories, for each of which you can establish two percentage rates. You can identify the individual customer as exempt from sales tax, or as quoting a sales tax exemption number.

### **Multiple Currencies**

Order Entry & Invoicing can accept orders in your selected local currency or in any other currency. You can enter, review, and invoice orders either in your local currency or in any foreign currency. You can use a fixed or variable exchange rate for foreign currency orders.

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