Sales Order Management

Slingshot Software's Sales Order Management module provides unparalleled flexibility that allows you to address each customer's specific preferences and needs. Treat each customer as if they are your one and only customer.

Order types can be designed with complex workflows, automating manual processes, eliminating errors, and providing superior customer service.

Forms can be added or changed easily, allowing you to "personalize" the application to your specific requirements without programming.

What's more, tools are provided to allow you to re-apply your "personalization" to future releases of the standard product.

Slingshot's sales order management module - Sell - supports customer service functions (call center) and self-service customer orders (customer portal). Use the same powerful toolset and avoid expensive programming.

Define "User Roles" For Unprecedented Control

Use the power of the Internet to open your order management application to multiple interested parties, with complete security and control. Customers, sales representatives, suppliers, and customer service staff all have unique needs. All Slingshot products allow groups of users to get their own tailored view of the system.

Provide Secure Internet Access to Your Customers

Slingshot's sales order management "Store" allows you to accept customer orders entered on the Internet. A familiar shopping cart metaphor leads the customer through the process. Support is provided for hierarchical catalogue entry, product search, and customer shopping lists. Order acknowledgements, shipping confirmations, and invoices can be emailed automatically.

Order Types Allow You to Set the Processing Path

The Order type design tool allows you to define an unlimited number of order types, each with a unique sequence of processing events.

Support is provided for: Domestic Orders, No Charge Shipments, Exports, Customer Returns, Blanket Contracts, Service/Repair Orders, Customer Quotations Consignment Orders and Emergency Shipments. New types can be added easily allowing you to nimbly adapt to new requirements.

Multiple Tools Speed the Entry Process

Shopping lists can be set up for repetitive sales or, click a link and browse available products by product code, description, ship-from location, or product group. The "Order Copy" feature allows you to copy all or part of an order to a new order. Merge multiple orders into a single order. Copy an invoice into a customer return and credit the customer for the amount originally billed.

Tax and freight are calculated automatically as the order is entered. The tax calculation considers the taxing jurisdiction and the tax class of the product and customer. The invoicing process automatically posts sales tax to a liability account associated with the jurisdiction.

Freight can be calculated based on the weight of the order, a percentage, or a flat monetary amount. The actual freight charges can be confirmed during shipment (interface with manifest system), or entered during an invoice review process.

It is also possible to accrue estimated freight, and reverse the accrual when the carrier invoice is received. The Freight Terms table defines whether or not the freight charge is billed to the customer.

Hierarchical Product Catalogue with Pictures

An unlimited amount of descriptive information and a picture can be entered for each product. Each product can be placed in a hierarchy, which is also used to produce a printed catalogue. Powerful search capabilities enable users to instantly pinpoint any product, using the hierarchy or product description.

Product Cross References

You are able to cross reference your part number with your customer's part number. Orders can be entered using either number. Cross-references are also maintained by supplier and by manufacturer.

"Available To Promise" at a Click

As you enter a sales order the system confirms product availability. If the product is on backorder you can click the "ATP" button and a pop-up form shows you when it will be available. The ATP calculation considers scheduled purchase order receipts, as well as future sales order demand based on scheduled shipments.

Support for A Wide Variety of Pricing Schemes

An unlimited number of price lists can be entered. Each list has its own schedule of products. Each product can have its own pricing method (Unit Price, Cost Plus, List Minus and $Achievement). Quantity breaks (unlimited) can be specified.

The "$Achievement" method allows you to give discounts based on cumulative purchases over a set period of time. Price lists can be associated with each individual customer, or with a group of customers. Price adjustment records allow additional discounts from the customer's list price.

Promotions can be applied to standard pricing rules. A promotion can be associated with a group of customers and/or products. Multiple methods are provided for calculating the promotional discount (e.g. percentage, $ per ordered unit). The system automatically attaches promotion records to the order as it is entered. The promotion tracking facility allows you to measure bottom-line results.

Keep Internal Notes and Attachments with the Order

Notes can be added to an order or a line item. Support is also provided for attachments including pictures, drawings, spreadsheets and word processing documents. Notes can also be automatically associated with a group of orders. For example, add a promotional message to the acknowledgment whenever a certain type of product is ordered.

Line types Control Shipping and Billing Processes

Standard Line Item Types include: Ship&Bill, ShipOnly, BillOnly, Return&Credit, ReturnOnly, CreditOnly and Quotation. New line types can be "user-defined". An Order type can be associated with a default line type and a group of "valid line types". This powerful capability allows you to support multiple fulfilment paths on a single sales order. For example, receive a defective item from the customer and ship a replacement on a single sales order.

Shipment Control at the Order Line Level

The sales order management module defaults information from the order but allows you to override most controls on each line item. Ship-from and Ship-To addresses can be set on each order line along with a shipping schedule (multiple dates). Fulfillment rules (Ship Complete, Auto Cancel Back Order) can also be set for each line item. Support is provided for drop-shipments, which can also be specified for each line item.

Package Tracking Facility

A tracking identifier is maintained for parcel shipments. Click the number and the system will link to the carrier's web site and display the current delivery status of the parcel.

Customer Hierarchy

Each customer can have one address record or an unlimited number of Bill-To, Ship-To, and acknowledgement addresses. Information defaults from the Customer record to the sales order automatically to speed the entry process, eliminate errors and ensure accurate compliance with customer preferences.

E-mail Documents to "Stakeholders"

You can allow contacts at an address to "subscribe" to emailed documents. Whenever a document is generated, the system checks for subscribers at the addresses associated with the order (bill-to, ship-to, ship-from, sales rep). Each subscriber is emailed a copy of the document in Adobe PDF format.

Configurable Credit Checking

Credit checking can be performed selectively on certain types of sales orders. Credit worthiness is verified when the order is booked and prior to releasing each shipment for picking.

Set credit checking rules for a customer or a particular bill-to address. These rules can include both current exposure and delinquency tests. Current exposure is measured by summing open receivables plus open sales orders. A flag by order type and status determines whether or not the order counts as credit exposure.

The delinquency test considers the account aging. If a specified percentage of the accounts receivable balance is over a specified number of days past due the account is considered delinquent for credit-checking purposes.

Multiple Billing Options

Multiple billing options are supported, including: shipment billing, milestone billing and recurring billing. Multiple invoices for a customer purchase order can be consolidated into a single invoice on a daily, weekly or monthly basis.

The invoice document's format can also be adjusted to meet a customer's specific requirements. Invoices can be posted directly to receivables or held for review and approval. The rules are specified by type of order.

Multiple Payment Methods

A default payment method is kept at the customer level. Options include "On Account", "Credit Card" and "Cash on Delivery". For credit card customers, the company (e.g. Visa) card number and expiration date are maintained.

A standard interface is available allowing the system to be easily integrated with your credit card processor. The card number is verified and an authorization number recorded when the order is posted. The billing is posted to the credit card company as a receivable in eCity Receivables. The billing is settled by applying the remittance in the normal manner.

"Alerts" Keep You On Top Of Customer Issues

Slingshot's Alerts allow you to define conditions that will be monitored by the system. For example, an Alert can be triggered when a large order is received or cancelled, an important customer falls into a "credit hold" position or, the order rate falls substantially below forecast.

Any number of Alerts can be defined. Your "User Role" determines the alerts available to you. You receive an alert by "subscribing" to it on your home page. If the Alert condition is true you will receive a message when you sign in to the system. You can also request delivery via email.

Integrated Report Writer

The sales order management module provides a complete set of order, shipment and sales reports, and table listings. All reports and documents were developed using SAP Business Objects Crystal Reports toolset. Formats can be easily modified to meet your specific requirements. New reports can be developed and easily added to the application menus.

Microsoft Office Integration

All reports can be exported into a range of different formats including PDF and CSV files. They can also be downloaded into MS Excel or MS Word documents.

SLINGSHOT™

Over the past 3 decades, Slingshot has helped companies just like yours achieve the next level of efficiency, growth and profitability.

Our innovative approach to ERP software development, implementation and ownership allows you to extend your ERP systems without programming.

This lowers your costs, ensures scalability, decreases time to return on your investment and lowers your overall risk.

When it comes to ERP software – we innovate.

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