GREAT PLAINS
Dynamics

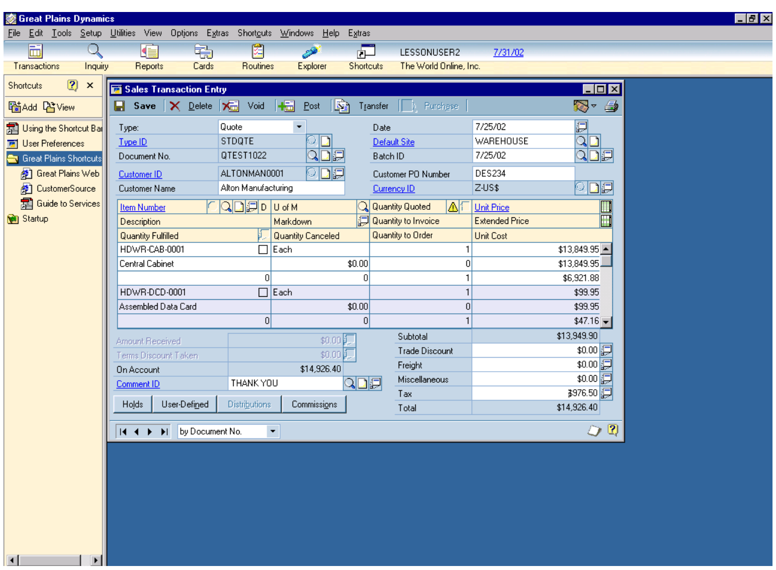
# Sales Order Processing with Advanced Invoicing

Dynamics Sales Order Processing with Advanced Invoicing combines the powerful features you expect from a world-class sales order system with the hallmark technological advancements of Great Plains Dynamics.

With Sales Order Processing, you'll be able to efficiently manage complex multi-step orders and quickly respond to changing demands. As a result, you'll have greater control over the quality of your order cycle, increasing customer satisfaction and improving user productivity.

Dynamics Sales Order Processing works seamlessly with the other Dynamics modules, such as Receivables Management, Multicurrency Management, Bank Reconciliation for Cash Management, General Ledger and the Dynamics electronic commerce applications-eView and eOrder.

## Time saving data entry procedures increase office productivity




*Sales Transaction Entry enables you to quickly enter quotes, orders, back orders, invoices and returns in one window. Each area of the window can be expanded to change or add information.*

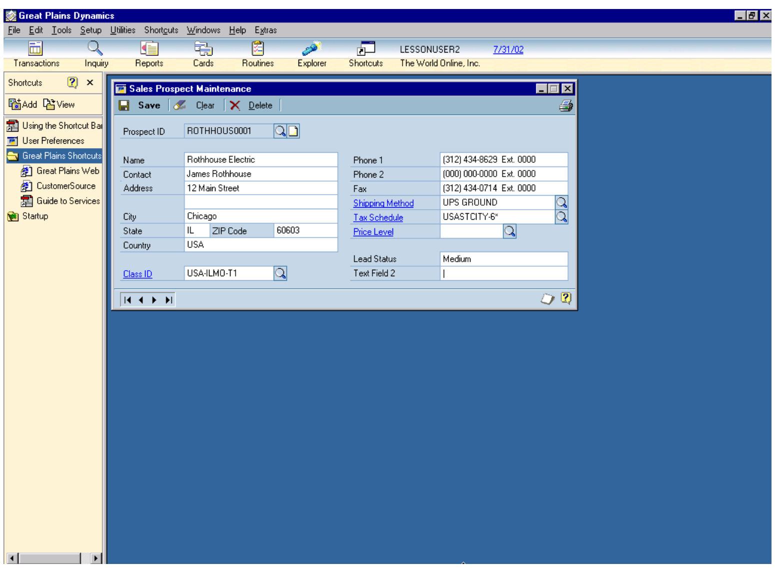
**One window entry:** All transactions-quotes, orders, invoices, back orders and returns-are entered in the same window for easy document management. One-window entry also provides immediate access to all related information.

**Customized transactions:** Your sales order process can be as simple or sophisticated as you desire because you can identify specific business rules (such as requiring sales manager approval) that apply to different types of orders.

**Batch processing:** Save time by entering  groups of similar transactions that share a common attribute into a batch, and then print, transfer, or post them at the touch of a button.

**Customer options:** Look up existing customer information or enter new records as you enter transactions. You can view and change customer information for one transaction, or save changes on customer cards that will be incorporated throughout the accounting system.

**Prospective customers:** Enter potential customers as prospects and track them separately. Records can be easily and quickly transferred to the customer file when a prospect agrees to order. A separate database also helps you manage prospect mailings and call back activities.




*Sales Order Processing enables you to track prospects separately from customers for marketing uses.*

## Sales Order Processing provides process control, customization, verification and security

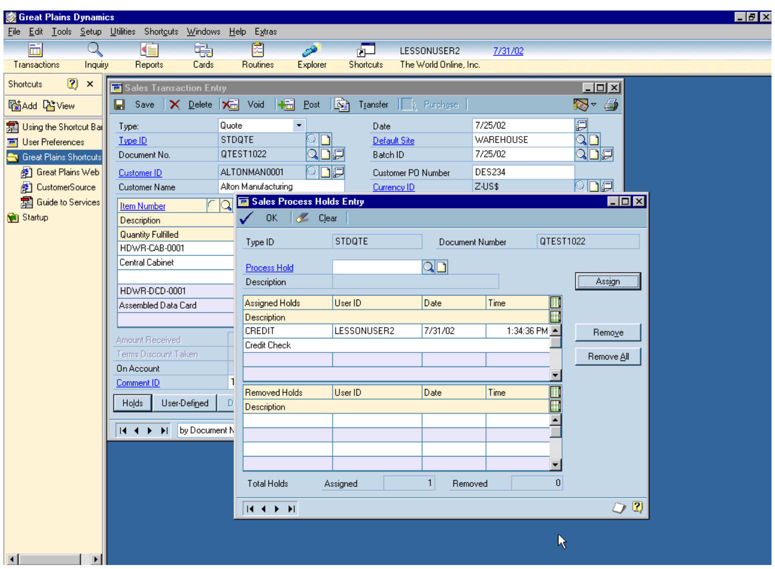
**Master numbers:** Define and use master document numbers to tie together related quotes, orders, invoices and other documents. Using master document numbers makes it easy for you to quickly drill down from a customer's most current invoice to all related sales documents.

**Set business rules:** You determine how the transaction flow should proceed. For example, you decide whether all quotes must be turned into orders first, or if they should be transferred directly to invoices.

**Repeating documents:** Make use of repeating quotes and sales orders to record those transactions that occur on a regular basis, enabling you to save transaction entry time and increase accuracy and consistency.

**Definable fields:** Customize the type of information that's important to you, using up to 10 definable fields. Text, date and list fields are available so you can track lead origins, call back dates and order methods.

## Process holds give you precise control over the flow of your sales process




*Sales Process Holds allow you to have precise control over the flow of your sales process. You define the holds, identify the documents they apply to, and verify their completion at any time throughout the sales cycle.*

**Unlimited process holds:** Define an unlimited number of process holds that can be assigned to your sales documents. You can apply holds to documents to ensure the proper procedures are followed at different stages of the sales cycle.

**Flexibility:** Review, add or remove process holds you as complete individual transactions, allowing you to make last minute changes to documents. You also can assign holds after-the-fact for selected ranges of documents. For example, place a hold on all orders for a particular customer, or for orders containing a specific item. After the situation is resolved, you can remove the hold from those documents.

## Comprehensive item entry and tracking gives you information you need to process documents and handle exceptions as they occur

**Item information:** Easily look up item numbers, enter new items into Inventory or sell non-inventoried items. Display three lines for each item entry, or for quick verification, you can choose to show only the first line of each item entry.

**Default information from Inventory:** Simply select an item and information about the item will be displayed. You can then change virtually every facet of the line item record.

**Inventory allocation:** Specify whether item allocations will occur at the moment you enter an item, or as a group at the document or batch level. You can determine if you want to deal with quantity shortages upon line item entry, or at a later time.

**Kit items:** Create kit items in the Inventory module and sell them through Sales Order Processing. Kits are groups of items commonly sold as a single unit, allowing you to set a single price for the group of items in the kit. Filling orders is easy because you can substitute kit components to account for item shortages at the point of order entry.

**Drop ship items:** Reduce the need for keeping excess inventory on hand. You can order items from your supplier to be sent directly to your customer by entering drop ship items on sales transactions.

**Discount management:** You specify how discounts should be managed, then enter markdowns as percentages or amounts. You also can choose to enter trade discounts for an entire document.

**Returned items:** You control how return items will be handled by accepting return items at the current item cost, or entering the original cost for that item. You also can return quantities to multiple quantity types; for example, part of the shipment can be returned to Quantity on Hand, while the rest could be considered Damaged Inventory.

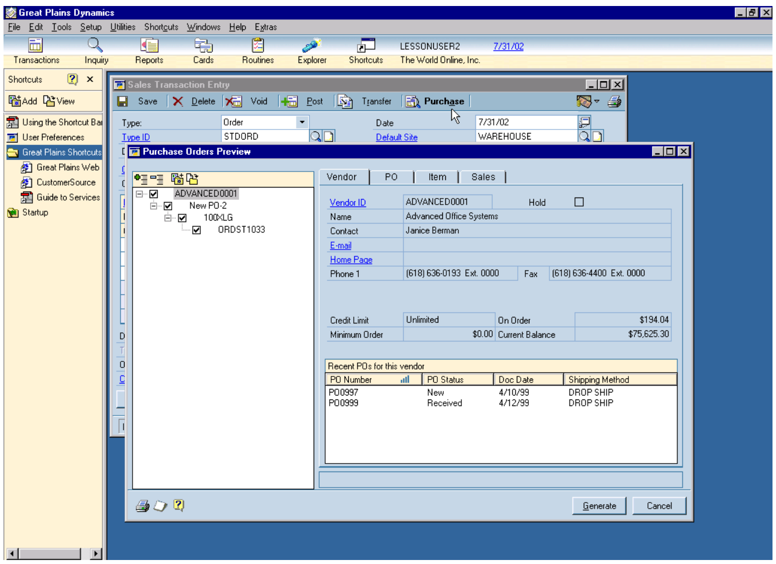
**Multiple site allocation:** If a shortage occurs, you can allocate inventory from multiple sites for the same item. Additional shortage options include substituting, overriding or selling the balance, allowing you to decide the most efficient method of handling shortages.

**Information availability:** You can easily locate quantity ordered, back ordered, previously invoiced, canceled and allocated information about an item because item quantity information is available in the Sales Quantity Status window.

**General Ledger accounts:** Modify General Ledger distribution accounts for each item, and view all transaction distributions at the same time.

**Special instructions:** Customize instructions by entering extensive item descriptions, comments or special handling instructions for each item. You also can print those comments-up to 50 characters each-with your sales documents.

## Automate your distribution process with integration to Purchase Order Processing




*Quickly and efficiently generate a purchase order for your item shortages directly from Sales Transaction Entry window.*

**Generate purchase orders:** Quantity shortages on back orders and orders can quickly be acted upon at the touch of a button. Tailor the process to your own business practices; sales clerks can create a purchase order for a single document in sales transaction entry, or purchasing agents can create purchase orders for an entire range of sales documents.

**Commit existing purchase orders to sales documents:** Link new sales line items to purchase order line items already in the system for easy tracking throughout the life cycle of the sales process. Flexible setup options allow you to direct whether this link is created automatically to save you time or if manual decisions are required, giving you full control over the pairing of documents.

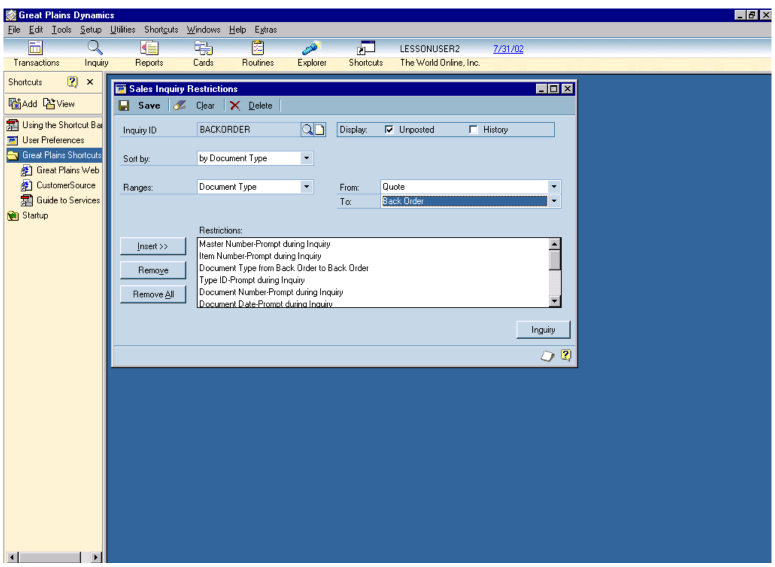
**Automatic fulfillment improves customer satisfaction:** Receiving shipments in Purchase Order Processing automatically fulfills the corresponding orders in Sales Order Processing, allowing you to quickly move forward with the customer's request. This ensures that the sales items receive priority, satisfying the customer demand in a timely manner.

## Powerful inquiries and drill downs put information at your users' fingertips

**Cross-module inquiries:** View information instantly by zooming from a customer's outstanding balance in Receivables Management back to the originating Sales Order documents that made up that balance, providing an instant, on-screen audit trail.

**Online information availability:** Take advantage of fast, intuitive data access. Sales Order Processing enables you to view document, item, serial/lot number, salesperson, and process holds information online.

**Sales range inquiry:** Define multiple restrictions and indicate date ranges and items for documents you wish to view. Only the information you specify will be displayed; for example, you can set up a document inquiry that includes only back orders within a range of dates and containing a specific item.




*Sales Order Processing allows you to set up "Inquiry Ids" similar to Report Ids, so you can define common inquiries you use often, giving you quick access to the information you need.*

## Rich reporting capabilities provide in-depth activity tracking and analysis

**Routine documents:** Easily print quotes, orders, invoices, back orders, returns, picking tickets, packing slips, and mailing labels, along with a broad array of reports you can use to help you monitor sales activity.

**Analysis reports:** Print sales analysis reports to determine exactly which customers are purchasing the most, which salespeople are generating the greatest sales volume, and which inventory items are selling the best.

**Historical reports:** Historical reports provide you with audit information whenever you need it.

**Report options:** Create reports that present the information you need in the best format for your business. You can save unlimited versions of each report, and group reports for consistent analysis. Reports can also be added to the individual’s Work Buttons, enabling them to print their own reports whenever needed.

**On-screen reporting:** Quickly print any report to your screen and electronically search for specific information you need.

**Financial intranet:** Share reports with authorized employees anywhere, any time by posting reports on your intranet.

**Custom reports:** For complete reporting flexibility and power, the Dynamics Report Writer and Crystal Reports enable you to modify existing reports or create entirely new reports, including graphing capabilities, and the ability to export data to spreadsheets and other applications.

## Multicurrency functionality for your growing business

**Multiple currency options:** Efficiently enter and view multinational transactions in originating or functional currency, translated using exchange rate tables.

**The euro:** With the introduction of this new trading currency, Sales Order Processing allows you to enter, track, inquire, and report euro denomination transactions for your European customers as easily as national currency transactions.

## Delivering the power of the Internet to your business

**Extend the reach of your information:** Employees throughout your organization can share accurate and up-to-date Sales Order Processing information without having to access the accounting system because eView provides business intelligence by securely connecting your Dynamics information with the Internet. With eOrder, your established customers can securely enter orders directly and can check on the status of their orders any time.


*With eOrder, you can allow your customers to enter orders and view order status anytime, anywhere.*

**Internet URL addresses:** Integrate the web throughout your accounting information, attaching Internet addresses to items, customers, vendors and employees.



GREAT PLAINS
www.greatplains.com