

SALES

Microsoft Business Solutions

Microsoft® Small Business Manager 7.5

Improve efficiency and increase customer satisfaction with Microsoft® Business Solutions Small Business Manager. Streamlined sales processes enable employees to process and fulfill orders smoothly, while robust integration and reporting capabilities turn sales information and customer data into a powerful business tool.

Streamlined sales processes help you serve customers more effectively and ensure efficiency and accuracy.

Handle shortages effectively by canceling or backordering item quantities.

Quickly create a customer invoice from your sales order information without additional data entry.

The screenshot displays two overlapping windows from the Microsoft Small Business Manager 7.5 application. The top window is the 'Blank Invoice Form' for 'Wide World Importers (Sample)'. It contains fields for Order No. (01020000), Date (8/14/2002), Address (2345 Center Ave, Arlington, IL 62545), and Customer ID (C0HDSF0R0001). It also shows a table for items with columns for Item Number, Description, Quantity, Unit Price, and Ext. Price. The bottom window is the 'Blank Invoice Form' for 'Wide World Importers (Sample)'. It shows the Bill To and Ship To addresses (Coho Sports, 2345 Center Ave, Arlington, IL 62545) and a table for items with columns for Purchase Order No., Customer ID, Salesperson ID, Shipping Method, Payment Terms, and Item Number. The table shows one item: Item Number 52100, Description Tents, Quantity 1, Unit Price \$229.99, and Ext. Price \$229.99.

Provide customers with accurate order details on the order, including quantities ordered, shipped, and backordered.

Send printed or e-mail invoices, which can be personalized to reflect your business identity.

Seamlessly manage sales processes

With flexible sales functionality that includes integrated quotes, orders, back orders, drop shipments, invoices, item receipts, and payments, employees can manage the sales process efficiently and consistently, saving time and reducing the need for data re-entry.

Serve customers more effectively

Enhance customer relationships and reward top customers with multiple pricing levels, trade discounts, and line item markdowns. Fulfill orders promptly using drop ship sales orders, and improve accuracy with packing slips, picking tickets, and the ability to print historical sales documents.

Know your customer

Maintain a complete, customized view of customer data, including credit limits and transaction history. Easily track histories to identify top customers.

Increase sales

Extend sales and marketing efforts by generating personalized letters and campaigns in Microsoft Word and reaching new and existing customers through Microsoft bCentral Web services, such as bCentral Commerce Manager.

Access and analyze sales data

View and analyze the exact information you need to manage cash flow, sales, payments, customer activity, and sales commissions, using comprehensive reporting and inquiry tools and robust integration with Microsoft Excel.

Microsoft Small Business Manager can be acquired affordably and maintained as a long-term investment, with software updates, new releases, and full reimbursement if you upgrade to a higher-end Microsoft Business Solutions application.

Microsoft®
Business
Solutions

www.microsoft.com/SmallBusinessManager

FEATURES LIST

SETUP

Customer set-up

Input and track customer information at any time, including multiple and unlimited addresses, payment terms, finance charge, credit card, and complete history information.

Customer maintenance

Easily look up existing customer information. View and change information for one transaction, or save changes to update automatically throughout the accounting system.

Credit limits

Define individual customer credit limits and receive alerts when limits are close to being exceeded.

Transaction import

Easily import transactions to Accounts Receivable.

DAILY

Streamlined processing

Easily transfer quotes to orders or invoices, as well as accept deposits.

Customer-specific pricing and trade discounts

Apply multiple pricing levels to sales items and assign a level to a specific customer. Check credit limits, and set up trade discounts for preferred customers.

Line item markdowns

Reduce prices for specific customers on a line item as a set amount or percentage of the price.

Backorders

Create sales orders without having specific line items in stock, with options to backorder or cancel orders. The backorder quantity is tracked and filled when inventory is replenished.

Drop ship orders

Fill orders quickly by shipping directly from your vendor to a customer without receiving or selling from inventory.

Apply payments

Apply receipt of payment via cash, check, or credit card to a specific invoice or to the overall customer balance. Assess NSF and finance charges according to your business rules.

Packing slips and picking tickets

Print packing slips to accompany each order and invoice, as well as picking tickets for orders, invoices, and returns. Print or e-mail slips and tickets individually or as a group.

Partial invoicing

Transfer partial kit quantities to an invoice while tracking component backorders and fulfillment.

PERIODIC

Customized statements

Tailor statements using a step-by-step wizard, which allows you to preview and verify information before printing.

Letter Writing Assistant

Integration with Microsoft Word lets you quickly generate collection, thank-you, and survey letters or create your own letter templates.

Reminders and alerts

Automated reminders prompt you before customer payments are due or when they are overdue, while alerts prompt you about bills to pay or overdue invoices.

REPORTING

Flexible reporting options

View unposted, posted and historical transactions, plus complete customer data, period sales, and yearly sales information in reports such as Customer Balance, Customer Contact List, NSF Customers, and This Month's Sales. Easily print historical sales documents.

Sales tax reporting

Track state, local, and other sales taxes for full sales tax reporting.

Sales commissions

View commissioned sales and generate up-to-date commission reports using Microsoft Excel.

Export to Excel

Export reports and SmartList query results to Excel for advanced sales analyses and create graphical reports using pie graphs, charts, and other visual tools.