

Sales Management: Streamlining Your Sales Process from Prospecting to Invoicing



Streamline your sales process and gain efficiencies allowing you to focus on growing your business.

Every sale has a cost related to processing orders from the time you make first contact to the moment you send an invoice. Minimize the time required to process orders and maximize the time spent finding new business or maintaining satisfied repeat customers. Maximize your sales with INDUSTRIOS.



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“INDUSTRIOS has been an invaluable tool, allowing us to be more efficient, accurate and productive. We no longer manually type in shipping instructions into UPS; we can simply import the data from INDUSTRIOS. This means fewer mistakes being made in delivering orders on time”

Cynthia Kern, Shipping Manager, Pratt and Larson Ceramics.



1 Customer Management

Wish you had a seamless way to change a prospect into a customer?

Keep your prospect's history intact.

You worked hard during the prospecting phase with emails and documents going back and forth, you've created quotes and now you've landed a new account. Rather than having to re-key any information, all you need to do is change the account type to a customer and you're ready to process orders from them while retaining all history from the prospecting stage of your relationship effortlessly.

Do you need better account control to avoid costly errors?

Never ship to "credit hold" customers or give the wrong discounts again.

Use INDUSTRIOS's account status to clearly define the disposition of an account and control the type of transactions processed when an account is in a particular status.

With the ability to define account types and set defaults, you not only streamline data entry on new and prospective accounts you also ensure the accounts are set up consistently. The account type lets you control credit check rules, discounts allowed, pricing, payment and taxation rules, etc.

Giving you control will save you costly errors during processing later.

2 Quoting & Estimating

Need streamlined, comprehensive quoting?

Integrated quoting speeds up the process.

When a prospect contacts you looking for a quote, they don't want to wait days or even hours to get pricing and delivery dates. With INDUSTRIOS' Quoting, you can quickly take your customers' requirements and easily produce quotes with pricing and delivery dates. Whether you need to quote standard, custom, configured items or services, our quoting module has the tools you need to enter the quote quickly, manage it through its life cycle and win new business.

Want to know when quoted items can ship?

Get the answer immediately.

At the click of a button, generate the date a quoted item will be available to ship; easy! If you need to know if you can get the item earlier, drill down into the component details and see what materials may be causing a delay. Informative and fast, your prospect will appreciate it.

Do you need quotes to create sales orders and production jobs?

Streamlining the win process.

They can. Enough said.

3 Sales Order Management

Looking for faster and more consistent sales order entry?

Reduce the keying time.

Get your sales orders into the system quickly and easily. With INDUSTRIOS, defaults established on the customer account and item master automatically populate the sales order so you always have consistent data without having to key. All you need to do is identify the items and the quantities of each and your order is entered. With the ability to email your sales order confirmations right from INDUSTRIOS, you'll be able to get your orders confirmed quickly and ready for fulfillment, fast and efficiently.

Do you need sales orders integrated with the rest of your system?

Keep your sales data flowing.

INDUSTRIOS sales orders flow seamlessly to material planning, and shipment planning, and if needed you can easily create a job or a purchase order on the fly right from the sales order. In addition, if the items ordered are covered by a warranty or a service plan then those are automatically added to the customer account for service reference later on. Where company policy dictates a deposit at time of ordering, you can attach a prepayment to the sales order and apply it later to the final invoice. Integrated sales orders, count on it!



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“For us, implementation of the EDI module has allowed us to better service our customers by handling more orders in less time and without error”

Mark Bedford, Vice-President Finance, HPI.

4 Shipping

Need a better way of managing your outbound shipping?

Keeping shipments on time.

Whether you ship from stock or as finished goods come out of production, one thing is certain, you need effective tools to manage the flow of inventory from your shipping area.

With the shipment planning functionality you can plan your shipping days and weeks into the future. You'll know what to ship and when and can even organize by carrier if needed. You'll also be able to anticipate where you may potentially have shortfalls long before they impact your ability to ship on time.

Want an entire list of components included in a shipment of finished goods?

Our Shipping BOM lists it all.

If you're a manufacturer that ships products in parts for final assembly at the customer's site, or if you ship loose parts with your finished goods, then the INDUSTRIOS Shipping BOM is the tool you need. You can identify materials on a BOM list that will be shipped loose when the finished goods ships.

The Shipping BOM identifies any loose parts shipped and the list is also kept in history should you need to reference it later. Know what shipped in detail.

5 Invoicing & Credit Memo Processing

Want invoices automatically created after goods are shipped and inventory is relieved?

Streamlined invoicing, accurate inventory.

Having accurate invoices is as important as having accurate inventory which is why we update inventory when goods are shipped, enabling you to finalize your invoices according to your own schedule and needs.

For some companies, the invoices that are generated can be sent to customers via email automatically, for others that need to add charges or want to apply prepayments to the invoices, the invoices can be modified before sending them to the customers. Either way you get the correct invoices and your inventory is up-to-date.

Are pre-payments required before production begins?

No problem.

Easily create invoices for pre-payments or milestone billings and associate them with the applicable sales orders any time during the order's life cycle. When the order is shipped, you can easily apply the prepayments so the customer receives a correct invoice with all pre-payments listed and the final amount owing. Of course, when the final payment is received, applying it is easy too!

6 EDI

Is EDI a customer requirement?

Fast, efficient order processing.

More and more larger corporations require EDI as a rule. Integrating EDI into your sales fulfillment process couldn't be easier with INDUSTRIOS. Setup your translation tables with your various trading partners and let sales orders, advance ship notices, invoices, warehouse order and warehouse advises flow seamlessly. With robust error checking you can be assured that data issues are trapped and addressed before they become a downstream problem.

Eliminate manual data entry throughout your sales fulfillment process and benefit from quick order turnaround and reduced errors.

INDUSTRIOS can handle your EDI needs when it becomes a requirement.

Need to process orders received via flat or CSV files quickly?

EDI can help with flat and CSV files.

While you may not need full EDI, you can use some of the functionality to easily pull sales order data into your system from CSV or flat files. You'll save time re keying orders and eliminate the associated errors, in addition, you'll also be able to leverage the data validation that is a hallmark of our EDI functionality to ensure data errors in the files don't become a problem.



Streamline Your Process. Maximize Your Sales

Customer Management

- Enjoy faster data entry and consistency.
- Centrally manage account details including: classifications, payment, credit, shipping, taxes, pricing, invoicing, and carrier.
- Effortlessly review customer activity: sales orders, shipments, invoices, credit memos, production and a complete customer account profile.
- Easily record customer appointments.
- Automatically track email using the MS Outlook integration.
- Effectively manage transactions allowed on an account through user-defined account statuses.

Quoting and Estimating

- Effectively manage prospects' and customers' quotes.
- Easily prepare quotations for standard, configured or custom items.
- Quickly provide estimated delivery date using the material availability calculation.
- Enter a quote for a new item and when the quote is won you can easily create the item and the associated process plan.
- Effortlessly notify those involved in the quote process that action is required.
- Easily move the quote to sales and production. Automatically create customer accounts, sales orders, inventory master files, routings, bills of material and production orders.

Sales Order Management

- Effortlessly handle all order types including blanket, consignment, sample and intercompany.
- Speed up your order process with customer, item, shipping and pricing defaults, including customer specific pricing.
- Easily record inventory, non-inventory, warranty and service plans, and comments on each order.
- Sell your inventory in stocking or selling units of measure.
- Effortlessly expedite orders to production or purchasing as required with links back to the sales order.
- Automate your sales confirmations via email.
- Efficiently manage back orders and late orders.
- Accurately measure and review your customer delivery performance.

Shipping

- Analyze and plan your shipping based on required, promise or ship date, order status, or order types.
- Easily create shipments: directly from a sales order, as part of the Shipping Requirements Analysis, or directly from the Shipping Workbench.
- Create shipment paperwork including packing slips, proforma invoices, bills of lading, etc.
- Easily integrate and generate shipping labels using BarTender® by Seagull Scientific.
- Relieve inventory time of shipping and automatically create customer invoices for finalizing or automated emailing.

UPS® and Fedex® Integration

- Automatically send shipment details to the carriers' shipping software and seamlessly update the tracking numbers and freight charges on the shipment.

Customer Activity Query

- Effortlessly review your customers' buying trends.
- Easily review all quotes, sales orders, shipments, invoices, credit memos and cash receipts with drill downs to the transaction details where needed.

Invoice and Credit Memo Processing

- Quickly review invoices generated automatically from shipping and enter additional charges as required.
- Process payments against a sales order prior to the goods being shipped using the Pre-Invoice functionality.
- Easily create one invoice combining multiple shipments for a customer using the consolidation feature.
- Simply generate a credit memo from a historical invoice and include all or selected lines.

EDI

- Enjoy seamless EDI automation for Sales Orders, Advance Ship Notices and Invoices.
- Easily control how data is transferred through translation tables already built into INDUSTRIOS.
- Eliminate data entry and its associated errors.
- Avoid costly processing errors with effective error checking on incoming data.



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