

Order Management

BENEFITS

- **Consolidate data entry**
Order Management is tightly integrated with Microsoft Dynamics SL financial management and distribution modules to provide single-point data entry and a solid foundation for managing orders efficiently and cost-effectively.
- **Manage workflow**
Boost order management productivity and help improve customer service by automating workflow procedures. Microsoft Dynamics SL Order Management gives you precise control over the flow of order information.
- **Schedule flexibly**
Place large orders for best unit pricing, yet have goods shipped in small increments for production lines. With unlimited shipping dates per line item, you can easily schedule 1,000 units to be sent in 10 shipments of 100 units.
- **Work efficiently**
A single Sales Orders screen lays out information logically for everything from quotes to invoicing. Simply click to move through areas of customer order information or to launch other functions.
- **Find accurate information fast**
Enter orders and look up information quickly to boost staff productivity and lower your cost per transaction. Enter simple orders with only three pieces of information: customer ID, inventory ID, and quantity.
- **Monitor credit risk**
Apply your credit rules to orders to determine whether or not they should be accepted or shipped. The system constantly monitors customer credit and automatically contacts the credit manager when an order violates policy.

Microsoft Dynamics™ SL

Improve customer satisfaction by keeping order management employees on task and on top of the entire sales order process — under any circumstances — with Microsoft Dynamics SL Order Management. This core Distribution module provides comprehensive capabilities for a range of industries, such as distribution, service, and manufacturing, to help improve efficiency and customer service now and as your business grows.

Configuring unique order types is simple and helps streamline sales order management in your organization.

| Sequence | Description | Status * | Invoke Automatically | Hold on Credit Failure | Print A |
|----------|-------------------------------|----------|-------------------------------------|-------------------------------------|-------------------------------------|
| 1 | 0100 Enter Order | Required | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | 0110 Release Order | Required | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 3 | 0200 Print Order Confirmation | Bypass | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | 0230 In Process (See Shipper) | Required | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 5 | 0300 Enter Shipper | Bypass | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 6 | 0610 Print Packing Slip | Optional | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 7 | 0720 Confirm Shipment | Required | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8 | 0800 Release for Update | Required | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 9 | 0810 Update Shipper | Required | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 | 0920 Print Invoice | Optional | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

| Line Item | Description | Quantity | UOM | Unit Price | Discount Pct | Extension |
|-----------|-------------|----------|------|------------|--------------|-----------|
| 1 | ORCHAIN | 200 | S FT | 23.000 | 0.00 | 4.600 |
| 2 | ORCRANK | 200 | S EA | 34.000 | 0.00 | 6.800 |
| 3 | ORHANDLBAR | 200 | S EA | 56.000 | 0.00 | 11.200 |

| Date | Quantity | UOM | Price | Discount % | Price Type |
|------------|----------|-----|---------|------------|------------|
| 01/24/2000 | 1 | EA | 380.000 | 0.00 | |
| 01/24/2000 | 1 | EA | 400.000 | 0.00 | |

Provide exceptional customer service with instant access to pricing information and more while negotiating an order.

FEATURES

BENEFITS

Workflow Management

Help eliminate unnecessary steps in the order process, set up required steps, and automate routine steps. Procedures are determined by order type to accommodate many pre-defined and configurable order types.

Online Price Negotiator

Negotiate prices with immediate access to costs and pricing information. With "what if" capabilities, the system can automatically calculate the correct selling price according to pricing rules defined in sales order setup.

Automatic Adjustments

Manually change quantity, units of measure, price, discount percent, extension, commissionable cost, or gross profit percentage. When one field is changed, the system automatically adjusts the remaining fields accordingly.

Customizable Calculations

Historical pricing by customer is provided for reference. You also can calculate markup from cost and discount from list.

Comprehensive Order Types

Work with a variety of sales order types, based on the way your company does business. Nineteen pre-defined order types allow you to create order types and define the order process based on your business needs.

Pre-Configured Order Types

Pre-configured order types are entered at the order level and are central to the workflow orientation of the system. Each order type helps determine the steps taken during the life of an order.

Manual Overrides

Override shipping priorities and control what happens when orders exceed quantity on hand. Hold an order for completion or ship available quantities, with the remainder designated as backordered or canceled.

Multiple Sites/Dates per Item

Ship orders to multiple locations and on multiple delivery dates using Order Management support for unlimited addresses and dates per line item. For example, you can ship orders of the same item to separate stores across the country.

Powerful Search Capabilities

Track lot/serial numbers and look up order details by part number, industry part number, customer or vendor part number, competitor part number and more.



This document is for information purposes only.

MICROSOFT MAKES NO WARRANTIES, EXPRESS, IMPLIED, OR STATUTORY, AS TO THE INFORMATION IN THIS DOCUMENT.

© 2007 Microsoft Corporation. All rights reserved.

Microsoft, The Microsoft Dynamics Logo, are either registered trademarks or trademarks of Microsoft Corporation or Microsoft Business Solutions ApS in the United States and/or other countries. Microsoft Business Solutions ApS is a subsidiary of Microsoft Corporation.

South Anna, Inc
PO Box 3568
Glen Allen, VA 23058-3568
804-316-9660
www.southanna.com

Microsoft