

Sales Order



Quoting, order entry, picking, tracking, billing ... and beyond

Intrust Win Sales Order offers a host of features to improve your efficiency and increase your flexibility.

Sales Order helps improve your customer relationships by handling their orders promptly and correctly. Remaining inventory quantities appear on the screen. Backorder information is right at your fingertips so you'll know exactly what's ordered and when it will ship. And, you can print an online invoice or picking slip with just a click.

With **Intrust Win** Sales Order, you'll have quick lookup based on customer or transaction. You can enter, edit, and view invoices from a single screen, and you'll have access to all Accounts Receivable reports and inquiries. In addition, Sales Order provides the option for two-way split commissions and multiple tax locations per tax group.

Add, change, or delete codes for your general ledger distribution accounts or set up a selection of different receivable accounts. These general ledger accounts are used when transactions are posted for the customer. Sales Order provides the capability to assign distribution codes to customer records; then when you post transactions that involve the customers, transaction information moves directly to the accounts you specify for the associated distribution code.

Create a Bill of Lading form that is based on standard shipping documents. Sales Order also provides commission assignment by line item.

Additional Sales Order Features:

- batch processing
- transaction numbers generated automatically or manually
- convert quotes to live orders
- inquire on backorders
- optional tax-on-freight and/or miscellaneous
- tax-on-tax reporting (for example, GST/PST in Canada)
- plain paper or preprinted picking slip formats
- commissions payable on booked or paid invoices
- two-way split commissions
- ability to reapply payments and credits to specific invoices
- multiple tax locations per tax group
- customer comments fields
- comprehensive online help
- scrollable, detailed descriptions for each item
- lot tracking
- link to shippers such as UPS and FedEx for online tracking of shipments
- look up sales order transactions of any status, including orders already posted to history
- maintain separate, unique series numbers for credit memos and invoice numbers
- print or email an order acknowledgement form
- packing slip with quantity shipped and backordered information
- enter open-ended recurring entries
- print an acknowledgement, picking slip, packing slip or invoice for orders of a certain status price matrixes
- user-defined invoice and dunning messages
- quick lookup based on customer or transaction
- invoice entry, editing, and viewing from a single screen

- recurring entries setup
- change distribution code per transaction and cash receipt

Sales Order Reports:

- Recurring Entries List
- Backorder Allocation Report
- Customer Levels List
- Price Structures List
- Customer Pricing List
- Promotional Pricing List

Item ID	Description	Qty Ordered	Qty Needed	Unit	Ext Price
HCS04C00125Z	1/4-20 X 3/4 Hex Cap G15 Zinc	1,250	1,250	EA	87.50
WUS25	1/4" USS Flat Washer	10	10	LB	83.30
SB0400125Z	1/4-20 x 3/4 Step Bolt Steel Zinc	200	200	EA	232.00
2000-3/8	Irwin Speedbor 3/8" Drill Bit	6	6	EA	36.00

The Sales Order form lets you quickly and easily enter your customer's orders. The Sales Quote and RMA forms offer the same features and flexibility.

Inv. #	Date	Item ID	Description	Location	Unit	Qty	Unit Price	Ext Price
05120000026	5/12/2006	HCS04C00125	1/4-20 X 3/4 Hex.C.	TX0001	EA	500	36	30.85
04240000027	4/24/2006	HCS04C00125	1/4-20 X 3/4 Hex.C.	TX0001	EA	100	36	3.67
04240000030	4/24/2006	HCS04C00125	1/4-20 X 3/4 Hex.C.	TX0001	EA	2,500	36	129.50
04160000021	4/16/2006	HCS04C00125	1/4-20 X 3/4 Hex.C.	TX0001	EA	1,200	37	86.40
04160000022	4/16/2006	HCS04C00125	1/4-20 X 3/4 Hex.C.	TX0001	EA	1,250	37	85.50
04160000023	4/16/2006	HCS04C00125	1/4-20 X 3/4 Hex.C.	TX0001	EA	750	37	48.75
04240000028	4/24/2006	HCS04C00125Z	1/4-20 X 3/4 Hex.C.	TX0001	EA	100	37	45.90

You get access to the important information that you need to accurately fulfill the order including complete information about the items, as well as the customer's sales history.