

# Supply Chain Management

## BENEFITS

**Build strong customer relationships.** Delight your customers and increase retention with optimized invoicing and distribution capabilities that expedite inquiries and order deliveries, reduce errors, and minimize costs.

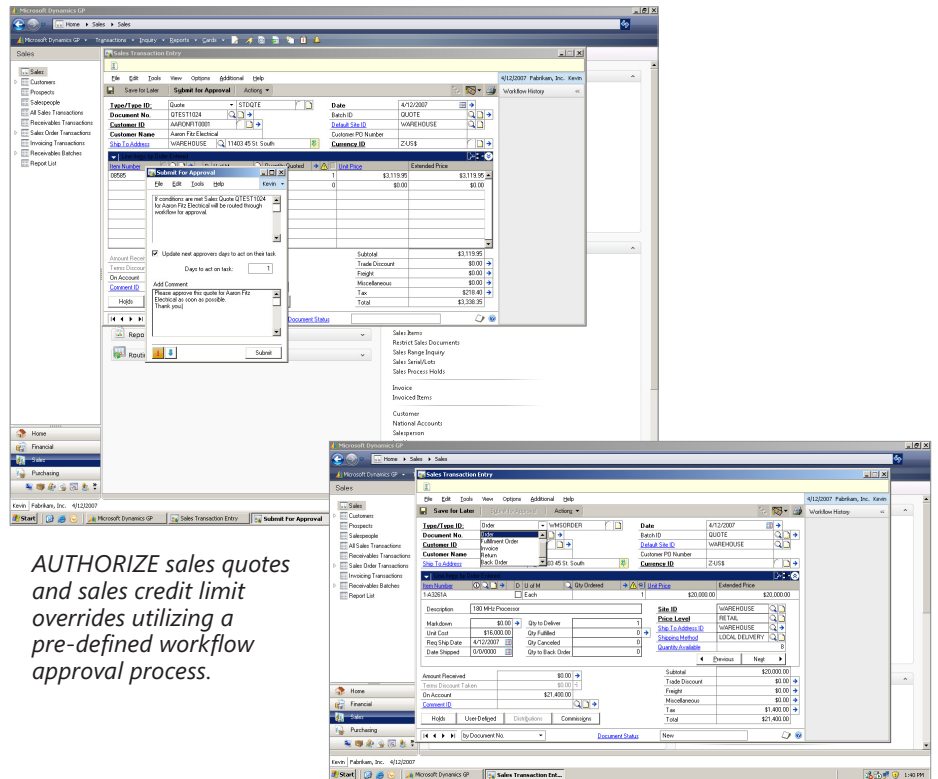
**Increase sales success.** Improve service and boost revenues with customer priority ranking. Expand your customer base and close more sales by tracking and managing potential customers as prospects, separate from existing clients.

**Increase office productivity.** Improve employee effectiveness and speed through invoice entry in a single window, with the ability to view all orders, invoices, back orders, and returns in one location.

**Fully automate your invoicing.** Expand your distribution capabilities and gain flexibility in reporting, order management, inventory control, and general ledger entry with smooth integration with other Microsoft Dynamics GP modules.

## Sales Order Processing in Microsoft Dynamics GP

By managing the entire sales process—from start to finish—with pinpoint accuracy, Sales Order Processing in Microsoft Dynamics™ GP helps you serve top customers more effectively, monitor fulfillment and invoicing more precisely, and streamline processes to minimize shipping costs and labor.



*AUTHORIZE sales quotes and sales credit limit overrides utilizing a pre-defined workflow approval process.*

*ENTER QUOTES, ORDERS, back orders, invoices, and returns from one central location.*

## SALES ORDER PROCESSING

---

### **Customer Priority Ranking**

Improve service efficiency—with an eye on profitability—by quickly identifying your top customers based on their priority rank. With customer priority ranking you can:

- Assign each customer or customer class a ranking of 1–99, or none.
  - Target specific customer information with restrictions by priority ranking assignments.
  - Use Advanced Distribution capabilities to direct allocations to specific customers based on priority.
- 

### **Flexible Order Processing Capabilities**

Modify sales documents to accommodate your company's unique business needs. With flexible order processing capabilities you can:

- Tailor the sales process with custom business rules.
  - Route Sales Order Processing quotes and other documents for approval before they're processed or shipped.
  - Enter negative quantities and prices on invoices to record and manage promotional giveaways and other sales transaction exceptions.
  - Control picking from expired lots when entering sales transactions.
  - Remove or replace line items without special editing actions by simply retyping over the current line.
  - Customize document fields to tailor the type of information to your business.
- 

### **Optimized Distribution Options**

Minimize costs, shorten delivery cycles, and ensure that sales items receive priority with flexible shipping capabilities and Purchase Order Processing integration. With optimized distribution options you can:

- Assign fulfillment sites based on their proximity to customer Ship To locations.
  - Send items from a single order to multiple customer sites.
  - Automatically populate Purchase Order Processing receiving shipments with information from corresponding sales orders.
-

## FEATURES

## SALES ORDER PROCESSING

<b>Invoicing</b>	
<b>Single Window Entry</b>	Improve invoicing efficiency with single-window entry for streamlined access to all vital information, as well as batch processing and easy return transaction processing.
<b>Posting and Document Dates</b>	Assign separate document and posting dates and record quote and order dates as well. Assigning separate documents and General Ledger posting dates enables you to post documents to the correct accounting period, which is especially useful when recording after-the-fact invoices.
<b>Definable Fields</b>	Customize the type of information that's unique to your business, using two definable fields on invoices.
<b>Cross-Module Inquiries</b>	Keep the most important information in front of you while drilling down for more details, making inquiries across Microsoft Dynamics GP modules, or displaying customer payment, shipping, and billing information.
<b>Sales Order Processing with Advanced Invoicing</b>	
<b>Discount Management</b>	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.
<b>Drop-Ship Material</b>	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.
<b>Kit Items</b>	Create kit items (groups of items commonly sold as a single unit) in the Inventory module and sell them through Sales Order Processing.
<b>Information Availability</b>	Locate orders quickly by searching for specific order types. Easily locate quantity ordered, back ordered, previously invoiced, cancelled, and allocated item information by accessing the Sales Quantity Status window.
<b>Track Orders with Custom Links</b>	Track orders by entering a tracking number in Sales Order Processing and using the hotlinks to UPS or FedEx sites to track shipments online.
<b>Customized Transactions</b>	Tailor order entry to your specific needs with customizable order defaults, price overriding, special instructions, and control at the line-item level.
<b>Unlimited Process Holds</b>	Define, review, or change an unlimited number of process holds to sales documents.
<b>Repeating Documents</b>	Save time and help ensure accuracy by transferring information from an existing sales order to a new sales order.
<b>Ship To Address by Line</b>	Speed time to delivery through multiple Ship To addresses on an individual order. Send each line item on an order to a different site for that customer, saving order entry time and consolidating tasks for faster throughput.

<b>Sales Order Processing with Advanced Invoicing</b>	
<b>Multiple Site Allocation</b>	Manage inventory shortages by allocating inventory from multiple sites for the same item, as well as options including substation, overriding, or selling the balance.
<b>Prospective Customers</b>	Track and manage potential customers as prospects, separate from existing accounts.
<b>Routine Documents</b>	Create routine documents such as quotes, orders, and invoices, or more complex ones such as sales analysis reports, in print or on-screen formats. Electronic search capabilities help ensure that you find the information you need.
<b>Automated Distributions</b>	Tailor the distribution process to your business practices with automated distribution capabilities available through smooth integration with other Microsoft Dynamics GP modules, such as Advanced Distribution and Available to Promise.
<b>Sales Document Workflow Approval</b>	Route Sales Order Processing quotes and other sales documents for approval before they're processed or shipped.
<b>Customer Priority Ranking</b>	Assign priorities to customers and customer classes, improving service efficiency with an eye toward profitability.
<b>Negative Price/Quantity in Sales Order Processing</b>	Enter negative prices and quantities to track line discounts, rebates, and returns—all on a single document.
<b>Sales of Discontinued Items (Option)</b>	Manage inventory more effectively with optional settings that prevent discontinued items from being entered on a quote, order, back order, or invoice.
<b>Control Use of Expired Lots</b>	Provide flexibility when working with expired lots during sales transactions. Choose to allow the sale of expired lots, require a password to control decision making, or prevent selling altogether.
<b>Ship Complete</b>	Set customer preferences for Ship Complete to default for sales documents, with the flexibility to change preferences at any time.
<b>Default Site per Customer</b>	Speed fulfillment and minimize shipping costs by specifying fulfillment sites based on customer locations.
<b>Sort Pick Ticket by Bin</b>	Optimize picking efficiency with the ability to pick according to warehouse bin locations.

For more information about Sales Order Processing in Microsoft Dynamics GP, visit [www.microsoft.com/dynamics/gp](http://www.microsoft.com/dynamics/gp).