



Order Entry/Invoicing

More sales, less administration

Customer orders and invoices drive most businesses, and are the centre of the service, billing, stock control, sales analysis and credit control systems. To minimise administration, Order Entry/Invoicing provides many automated features, plus the ability to customise the software to your needs, so staff can spend more time generating sales and less time accounting for them.

Key benefits include:

- Customised entry screens and document layouts
- Automatically fax and email documents (with Alex option)
- Virtually unlimited pricing flexibility
- Powerful backorder capabilities, with the ability to sell negative stock when needed
- Alternative product suggestions, if a requested item is unavailable
- Unlimited delivery addresses, run numbers and head office accounts
- Advanced sales analysis, and much more

Customise to your needs

The ability to easily create and customise your entry screens and documents means you can tailor the system to suit your needs.

- Tailor order entry screen layouts, with as much or as little information as you need
- Customise “zoom in” screens for extra information (for example, stock status)
- Use unlimited form designs for invoices, statements, picking and delivery dockets
- Choose the number of decimal places in prices and costs, and much more

Customer Invoice Entry - New Product Line

Customer: Abel Sound Systems Pty Ltd

Delivery Address Code: 001
 25 Burwood Street
 CARINGBAH NSW 2017

Invoice Form Code: [] GST Number: 5300408561E

| Line | Prod Code | Description | Quantity | Unit | Price | Discount | GST | Line |
|------|-----------|---------------------------------|----------|------|--------|----------|-------|--|
| 1 | CD | CD Player with Remote and Progr | 1 | each | 262.70 | 13.14 | 24.96 | |
| 2 | DVD | DVD Player | 1 | each | 510.00 | 25.50 | 48.45 | 532.95 <input checked="" type="checkbox"/> Yes |
| 3 | | | 0 | | 0.00 | 0.00 | 0.00 | <input checked="" type="checkbox"/> Yes |

Payment Details:
 Payment Amount: 0.00
 Amount Remaining: 807.47

Total less Tax: 734.06
 Total Tax: 73.41
 Invoice Total: 807.47

Order Entry provides powerful order management options including advanced back orders and more. If orders aren't required, during invoice entry you can print invoices and receipt payment immediately.

Customer Special Pricing option

Attaché provides enormous pricing options with six standard selling prices, and three discount levels. For virtually unlimited pricing flexibility, add the Customer Special Pricing optional extra to create special prices and discount records for customers and products. This automates:

- special contracted or negotiated prices
- date-based specials, for example for catalogues
- quantity breaks
- special offers on specific slow moving products, and much more

Customer Price Test

Customer Code: ABEL, Abel Sound Systems Pty Ltd
 Location: SYD, Sydney
 Product Code: CD, CD Player with Remote and Programmi
 Order Date: 16/08/2006

Normal Pricing Details

| | | | |
|-------------------------|---------------|------------------------|--------------|
| Cust. Special Price Cat | Price Code: 2 | Product Price Category | Disc Code: 1 |
| Customer Category: WH | Price: 320.00 | Product Group: ENT | Disc %: 5.00 |

Special Pricing Details

| | | | |
|--------------------------------|------------------------|---------------------|---------------------|
| Customer Code: (All Customers) | Valid From: 01/08/2006 | Price Code: 0 | Start Price: 320.00 |
| Location: SYD | Valid To: 31/08/2006 | | |
| Product Code: CD | Quantity: 70 | Disc Code: 0 | Minus: 20.00 |
| | | Disc %: 0.00 | Disc Amnt: 0.00 |
| | | Final Price: 300.00 | |

No more “out of stock” lost sales

What do you do if you're taking a customer order and there's too little stock to fill it? You might know of similar products that you could suggest, but do new staff or casuals? With Attaché, you can easily look up a list of alternative products, complete with stock levels, prices and comments. Particularly if your business employs casual staff or deals with thousands of product lines (for example, spare parts) being able to link alternative products can turn enquiries into sales. (Requires Attaché Products & Services.)

Customer Order Entry - New Product Line

Customer Details: ABEL, Abel Sound Systems Pty Ltd, Order Number: 1053, 25 Burwood Street, CARINGBAH NSW 2017, Deliver To: 001, Send Confirmation? No

Order Details: Reference: 21/08/2006, Date: 21/08/2006, Delivery: 21/08/2006, Customer ABN: 53004085616

| Line | Prod Code | Description | Ordered | B/Order | Price | Disc |
|------|-----------|------------------------------|---------|---------|--------|------|
| 1 | CD | CD Player with Remote and Pr | 1 | 0 | 262.70 | 1 |

Alternative Product information

| Alternative Product / Comment | Description | Qty Avail |
|-------------------------------|---------------------------------------|-----------|
| CDR | CD Player with Remote and Programming | 33 |
| Similar to Pioneer Model | | |

Total less Tax: 0.00 Total Tax: 0.00 Total: 0.00

While completing an order you can instantly view alternatives, complete with stock levels, prices and comments. You can then choose to use an alternative if, for example, stock levels are low or the customer prefers one of the suggested alternatives.

With Attaché Products & Services you can associate an unlimited number of alternatives with each product or service.

Powerful back-order facility

The comprehensive back-order facility handles items that are not available. Back-orders can be manually or automatically generated into orders once stock is received, and selected by product, delivery date range, location, customer range or selected customers.

Invoicing negative stock

Attaché removes one of the major frustrations of some “off the shelf” systems by allowing you to sell stock that you know you have, even when the system says you are out of stock, without the need to adjust stock levels first.

Alex option

The Attaché Alex document delivery service lets you send documents, such as invoices, by fax or email directly from your Attaché system. Using Alex leads to massive time and cost savings as well as faster, more reliable communication with customers. And for businesses with multiple locations or warehouses, Alex is great for emailing or faxing documents such as picking slips and delivery dockets.

Attaché Contacts option

Unlimited contacts details at your fingertips

With Attaché Contacts you can store an unlimited number of contacts for each of your customers, including their name, position, mobile phone, direct line, email and additional information.

Standing orders

Reduce re-keying by saving your regular customer orders and invoices as standing orders for future re-use. You can also use the same standing order for other customers and amend as required.

Preferred products lists

Preferred products lists help staff to know what a client typically orders. So, if a customer calls saying “send me some oil quickly”, you can easily see what brand and size they usually get.

Kits

Kits let you group a collection of products and services with their quantities, such as a home theatre system. When inserting a kit into an order, invoice, or quote (when Quotations is used), pricing and discounts are automatically calculated for the customer using any special pricing that applies to them.

Advanced sales analysis

Any combination of customer code, location, product group and three customer sales categories can be selected to provide simple or complex sales reports.

Customised reporting can be developed using Attaché ODBC to extract data into spreadsheets or specialist reporting tools such as PowerLink or Presenter.

SalesMatrix adds instant on-screen analysis to answer questions such as “What sales opportunities are we missing?”, “How is the sales team performing?” and “What customers and products are crucial?”.

Services

Attaché lets you standardise the descriptions of services by creating service items. This speeds up data entry, reduces errors, and assists with the reporting and sales analysis of services provided. You can even add additional descriptions using comment lines.

Run numbers

Attaché enables you to print picking slips, delivery notes and invoices in run number sequence. This makes it easier to pick and deliver goods to customers, saving time and delivery costs, plus it provides drivers with more time to sell.

Multiple delivery addresses

Each customer can have an unlimited number of delivery addresses from which you can select during order entry.

Head office accounts for split delivery/billing

The head office facility means that goods can be delivered to a branch while the invoice and statement are sent to the head office. Sales details remain by branch.

| | | | | |
|-----------------|------------------|-----------------------------|-------------------|-------------------|
| Customer Code | HOMEBR | | | |
| Name | Home Stores..... | | | |
| Street | Business Number | Delivery Point ID. | BSP | |
| P O Box 2265 | 53004085616 | | | |
| Suburb | Comment | | | |
| GRANVILLE NSW | Freight - COD | | | |
| Postcode | Country | Run No | Location | Territory |
| 2142 | Country | 1 | Location | NSW |
| Telephone | Fax Number | Discount Percentage | Sales Rep | Price Category |
| (02) 9625 2039 | +6129625 5621 | 0.00 | 2 | 2 |
| Contact | Sort Detail | In dispute | Category | Discount Category |
| Edward Ward | GRANVILL | <input type="checkbox"/> No | WH | 1 |
| Website address | Credit Limit | Terms Code | Special Price Cat | |
| | 60000.00 | 1 | | |
| | Payment Terms | Days | | |
| | Number of days | 21 | | |

Many other essential features

- Links to Powerlink standing orders
- automatic printing of picking slips and delivery dockets
- multiple barcodes
- official stationery for laser and continuous printers
- automatic GST/VAT calculations
- four different trading terms
- can print the number of packages
- forward dated orders and reserve stock
- promotional messages on invoices
- all reports can be printed or displayed on the screen at any time.



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