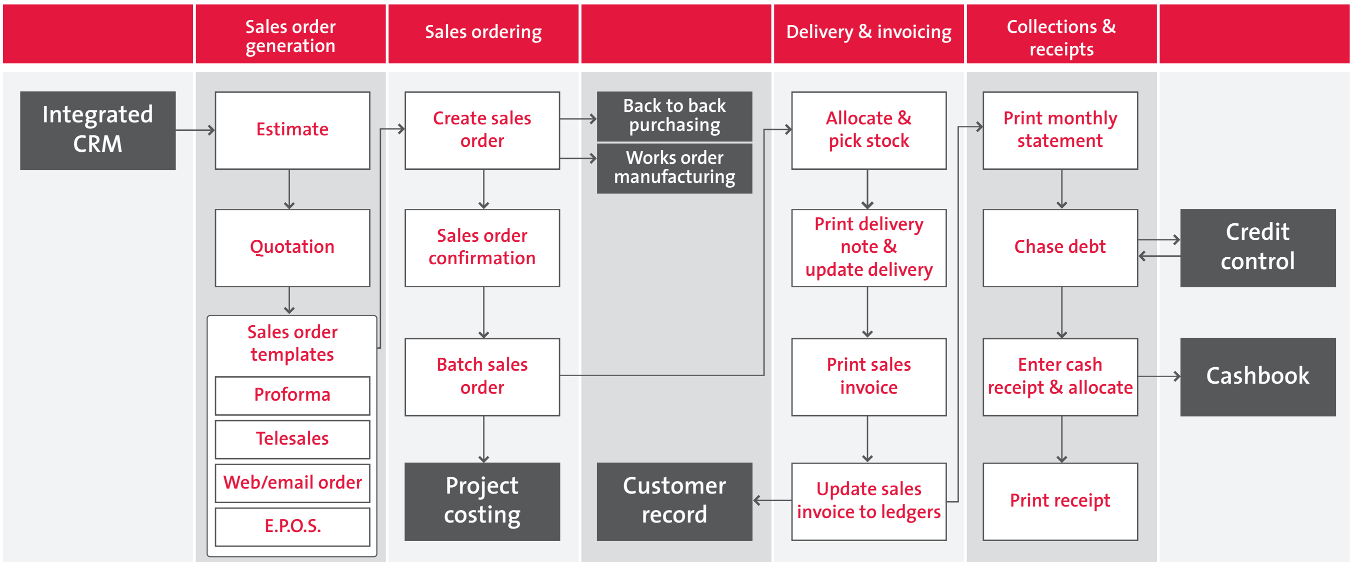
SOP & Credit Control

When it comes to sales, you want to know that every effort is being made to maximise sales opportunities, increase profit and improve customer relationships. Dimensions' Sales Order Processing (SOP) module helps you do just that. Accompanied by a range of easy-to-use tools, you have the visibility of information you need to take every order quickly and efficiently, control pricing and identify when profit can be made. At the other end of the process, our interactive Credit Control module is specifically designed to reduce your debtor days and improve cash flow.



Taking sales orders

Find customers by their postcode, customer code or name, or pick from a list sorted by region or salesperson – in fact, using any information that speeds your selection. Similar flexibility enables fast entry of each line item and stock code on the order. Multi-selecting many items from a list or duplicating part of a previous order adds hundreds of detail lines within seconds.

Using the SOP module, customers enter their own orders on websites and self-service forms, which are brought into your central system without any re-keying. Quotes and estimates are converted into sales orders with a single command, and immediately reserve stock as they enter your workflow.

Quotes & estimates

Pro forma invoices, quotes and estimates are converted into live orders with a single command simultaneously reserving stock and if appropriate, checking the sales commitment on projects. First-time orders convert prospect status to be customer status eliminating re-keying and improving the accuracy of pipeline reporting and sales management.

Cross-selling

Replacements are automatically proposed for superseded items. Alternatives are proposed for a current item that is out of stock or unavailable and you have opportunity to search by attributes such as colour, size or price if the alternatives proposed do not suit.

Contents

Stock codes can refer to a series of items which are all required to complete the sale (e.g. some products require packaging and accessories that are generic to many other stock items and only allocated at the point of sale).

Up-selling

You can create a list of associated products and services for any stock item and prompt your operators to cross-sell them. For example, products that benefit from accessories (such as a computer) can be associated with a selection of goods that could also be considered (such as a monitor, keyboard or cables). Promotional templates can be configured to include lists of 'sale' or 'slow moving' items that guide your staff through the sales process.

Sales information

The system provides full information, descriptive text, diagrams and photographs as appropriate making it easy for your sales staff to handle multiple campaigns without needing any prior knowledge of the items being promoted.

Repeat billing

Historical orders can be duplicated in whole or in part and scheduled to repeat at weekly or monthly intervals for speed and efficiency. Flexible billing templates provide your customers with flexible payment methods that attract and retain their business and automate your billing schedules, cash receipts and BACS collection. This ensures that each instalment is invoiced, collected and recorded.

Integration

Orders entered by field based sales staff, remote offices and van sales teams are all brought seamlessly into the main order batch for processing. Customers who enter their own orders on web sites or using software you provide for them have their entries added automatically into the batch. EPOS systems and third-party applications deliver orders one at a time or in batches.

Special terms

Ten 'standard' selling prices per stock item, line discounts, total order discounts cater for most customer requirements. Price Matrix (see below), which enables you to set a unique price and unique discount for every combination of customer and stock item, caters for the rest. Promotional prices are restricted to specific dates and can be withdrawn at will.

Every price can be overridden if necessary. Payment can be required within a number of days or by a specified day of the month. Settlement discounts are available at two levels.

Advanced Price Matrix

Pricing structures are, by their nature, complicated. The different data sets needed for each deal change according to customer, special offer, one-offs, price points, location or product. The way you access this data requires a system that is reliable, flexible and adaptable to any parameters you set.

Our Advance Price Matrix (APM) tool provides the best solution. Within a few clicks you can filter customer, product, offer or location to get to the most relevant pricelists for your sale. APM priorities for you – even automatically prompting up-selling through the enquiry window – making this a must-have tool for a competitive sales team.

Colour/size Matrix

Ideal for the fast-moving distribution industry, this tool presents stock and pricing information for product variations (e.g. colour, size) within a single screen, from which you can rapidly create multiple entry lines.

Analysis

Selection of the correct analysis codes is automated. The appropriate code is chosen using a combination of factors including customer type (trade, wholesale, retail) and type of product (hardware, software, consumables). You decide which analysis codes feed into which nominal categories and the level of detail that passes through. All analysis can be overridden if necessary.

Validating orders

Customers are validated against their credit limit and payment history, automatically flagging orders on hold (or where the orders value will take them over their credit limit).
The system checks stock availability, prices, discounts and special offers to ensure each line item is priced correctly. Special promotional prices are controlled such that they are only offered within a range of dates. The system checks and warns if profit is put at risk.

Each order is subjected to rigorous testing and validation prior to being accepted into the batch for processing. Once accepted it passes through a series of checks and tests that you determine.

User definable workflow

One-step workflow routines require one member of staff to validate everything on each order. Multiple steps force each order to be reviewed by many staff or departments, breaking the task into checks based on the customer (e.g. credit check, special terms check), the goods to be despatched (e.g. availability, price), logistics (e.g. available transport, economic routing) and any other factor important to your business.

Authorisation & alerts

Sales staff are alerted when their accounts place new orders. Management is advised when large orders are received. Relevant staff are notified when orders are ready for their attention or action.

As credit limits and due days are breached, a series of reports and alerts prompt the appropriate action. Setting 'next action' dates ensures the system prompts activity.

Making a profit

Profit per line and per order in total is calculated and displayed (can also be hidden) throughout order entry. The system will warn if an item is proposed to be sold for less than cost price. Profit can be reported and explored by customer type, product type and any demographic.

Picking & despatch

Orders are picked to your criteria, from order date, size and value to cost-effective delivery routes and carton size. Picking lists prompt delivery notes so that invoicing follows.
The progress and status of every order

is tracked through flexible enquiry screens and integration with online tracking applications. All documents can be sent digitally or printed as hard copy and an electronic version automatically stored centrally for immediate reference.

Customer requirements

The system gives you the flexibility to hold back or despatch part-orders as required. For example, some customers require immediate despatch the moment an item becomes available (meaning multiple deliveries per order) whereas others prefer the order to be held back until everything is ready for delivery.

Stock allocation

Stock can be kept free (available to any order) or allocated to current (or specific) orders at any time. Preferred customers can have their stock ring-fenced for them alone. Their orders will be picked and delivered in preference to all other transactions. A priority index for each customer creates a hierarchy of urgency enabling orders to be satisfied to pre-defined criteria.

Picking

Picking lists dictate the way staff move around the warehouse and the way in which goods are collated in the loading bay. Customer postcodes and routing priorities are catered for to ensure efficiency of transport.

Delivery notes

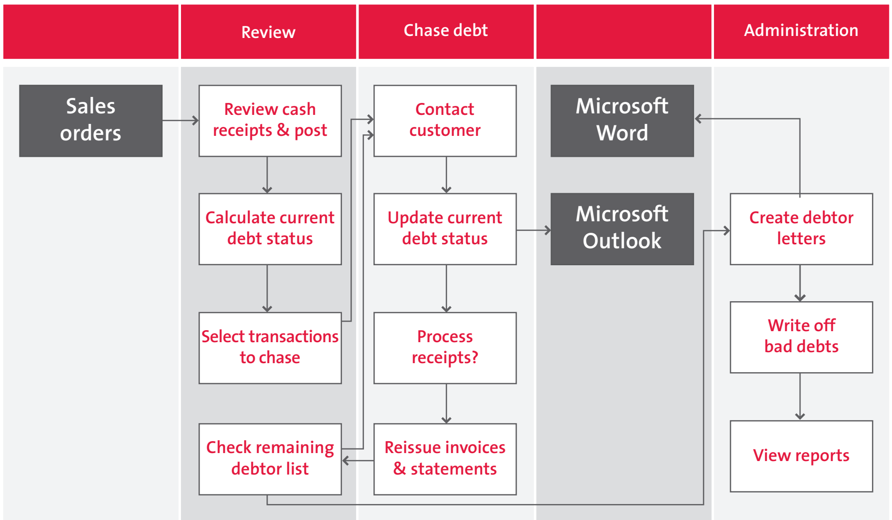
The system raises delivery notes for everything that is picked providing final confirmation that the goods are ready to go.

Invoices

The system raises invoices for everything that is delivered. Multiple deliveries can be combined on a single invoice which can be printed, saved to disk as a PDF and emailed directly to the customer or entered automatically into their own processing system.

Order tracking

Each consignment from every order can be tracked from entry to final delivery using flexible enquiry windows and on-demand reports. Integration with online courier services enables your customers to track this progress for themselves.



Online records

All information of the order and all associated documentation is stored centrally and are readily available to any authorised user.

Credit Control

Our fully integrated Credit Control module empowers your staff to reduce debtor days and increase cash flow. Role-based debt allocations coupled with automated reminders ensure the right action is taken at the right time. Payment promises are immediately visible, and debtors who breach their credit limit are tracked and analysed. While on the phone, staff can drill down to source documents such as invoices and statements and email them direct from the system for on-the-spot resolution.

Monitoring

As credit limits and due days are breached, a series of reports and alerts prompt the appropriate action. Flexible reporting helps you focus in on shorter lists of older debts that may need urgent attention. Debtors can be filtered by salesperson, region, product and a series of different demographics. Updates are available at any frequency required.

Escalation

Older or larger debts can be escalated to account managers or more senior collection personnel. Problem debts can be allocated to specific staff tasked with resolving the issues. An interactive 'chase debtor' screen shows each member of staff a filtered list of the debtors they are responsible for, giving instant visibility and detail of the outstanding balances and all the transactions they comprise.

Full information

A full transactional history including last payment dates is instantly visible. Drill down to re-print invoices, credit notes and sales statements all of which can be reissued immediately, either direct to the customer's email account (increasing the likelihood of on-the-spot resolution) or output to hard copy. A full dialogue audit trail is stamped with name and date so that you can monitor all payment promise dates and whether they were kept. Personalised letters can be sent from screen and recorded to re-enforce conversations.

Next action

Setting next action flags such as 'last call', 'first letter' and 'legal action' makes it easy to organise and prioritise future activity. Setting 'next action' dates ensures that the system prompts activity when it is required.

Posting transactions

BACS payments received by telephone can be entered to satisfy debts. Small amounts that have become uneconomical to chase can be written off. An automated routine is available in the event of bad debt write-off.

Credit reviews

Reviewing actual payment days against terms agreed provides invaluable insight when setting and reviewing future credit terms and orders.

Further information

For further information on the Access software portfolio, please telephone us on **01206 322575**, email **info@theaccessgroup.com** or, alternatively, visit our website at **www.theaccessgroup.com**