



Sales Management

From Prospect to Invoicing

The sales department is the front line in every business. To provide proper service, your customer service and sales teams must be capable of addressing a variety of issues quickly and efficiently. Your customers expect you to know who they are, the status of their orders, be able to prepare quotes quickly and accurately, process shipments according to delivery schedules, and react quickly to nonconforming items. Your future business depends on the service your customers receive today.



“Integration is key here, and Sales Order Fulfillment has allowed us to reduce our shipment error rate substantially while improving our overall shipping process. Customers are now given instantaneous information as to product availability when placing a new order or checking on an existing order,”

— Stanley Kiklica, Vice President of Operations, Computer Process Controls

The INDUSTRIOS Sales Management suite represents a group of modules completely dedicated to managing the sales process from prospects to invoicing. This comprehensive collection of tightly integrated modules ensures a seamless flow of information among departments. The features will enable your customer service and sales teams to stop searching through multiple paper files or flipping through screens to address customer queries.

Our dedication to achieving the highest standards of customer satisfaction for our software and services remains central to our core values. As many others have discovered, we provide you with the solutions you can depend on.

Customer Relationship Management

With today's increased competition, finding new customers and effectively managing their expectations through the sales cycle is not only necessary to grow your business - but required to survive. INDUSTRIOS CRM is your central point designed to assist you in managing relationships with your customers by improving how you are able to manage communications, review transactions, and monitor your ability to meet and exceed their expectations. At the end of the day, you want to ensure your customer service and sales staff is able to maximize every sales opportunity and improve customer satisfaction.

Record

- Appointments, activities and document references are fully integrated to the INDUSTRIOS operations modules. From any of the operations workbenches, you can review and create appointments, activities or documents and associate them with a specific record.
- Capture prospect information then easily change a prospect into a customer and begin transacting without having to reenter the account information or losing account history.
- Attach external documents to the account or contact for quick and easy reference.
- Communications received through email can be updated on the account and contact records directly through the email system.

Classify

- The Account Type allows you to: classify customers and prospects into groupings that are meaningful to your business; define how customer numbers will be assigned; and establish the customer profile defaults.
- The Account Status allows you to define business specific statuses. Each status can have unique business rules, color coding and exception messages.
- Each account can have an unlimited number of contacts associated with it. Contacts can be classified by type, status, department, and job titles. You can also identify which contacts are primary based on the type. Contact addresses may be the same as the account, related to a specific ship to or independent of the account.
- The activity type allows you to classify appointments and communications. You can also associate expected results for appointments.
- Classify the nature of the activity through user defined types. The activity type allows you to manage the nature of the activity, the direction and results. Record the date and time of the activity, the account, contact and the operations it related to.

Manage

- Control the types of transactions that can be performed on an account through the use of user defined account statuses.
- Easily review any of the following documents related to an account: quotes, sales orders, shipments, invoices, production orders, authorized returns and service tickets, and produce a complete account profile directly from the account workbench screen.

Communicate

- Mail merge allows you to send sales and marketing communications to your customers while simultaneously scheduling followup appointments.
- Target your communications based on customer classifications and statuses.
- Track the effectiveness of your marketing communications through the results captured during followup and subsequent reporting of the results.



Quoting & Estimating

Do you offer your customers choices of various features and options when ordering products? Can you manufacture totally unique items for your customers? Do you receive request for quotes from both prospects and customers for standard inventory items? The INDUSTRIOS Quoting & Estimating module is just what you need!

The Quoting & Estimating module allows for the quick preparation of quotations for standard, configured or custom items. The integration to the operations and customer relationship management (CRM) modules provides the estimating staff with the information they need to move quotes to customer orders quickly.

Classify

- Create user defined quote types that represent specific characteristics of the quote. Define how quote numbers will be assigned, identify how user defined fields will be associated and how the status flows for the specific quote type.
- Capture information unique to your business process through user defined fields. Associate a user defined field group with a specific quote type to standardize the data collection during quote entry. These fields can then transfer to the sales order when the quote is won.

Record

- Quickly capture information that may impact the estimating or sales process, such as: Request for Quote Number, source, reply due date, terms and conditions, etc.
- Whether a quote is for a complex custom item or a stocked item, INDUSTRIOS provides integration to inventory, production routers, bills of material, or configuration templates.
- Item availability and bills of material availability provide the information necessary to give delivery dates to the customer or prospect.
- Enter a quote for an item that does not exist in the system; when the quote is won you can easily create the item and the associated process plan.

Track

- Automatically trigger follow-up activities once a quote is delivered.
- User defined status flow allows you to define the quote review process and automatically notify those involved in specific stages that action is required.
- Quote revisions can be easily created and tracked. Pipeline reporting provides the capability to only include the latest revision.

Integrate

- Track quotes and communications for a prospect using the Customer Relationship Management (CRM) module.
- When a quote is won, easily move the quote to sales and production. Automatically create customer accounts, sales orders, inventory master files, routings, bills of material and production orders.

Price

- Standard pricing tables are used to default pricing for items defined in the inventory master.
- Automatically calculate pricing based on rules within the configuration template.

Configure

- Define the features and options for each product family.
- Establish prompts that clarify the nature of the information required in an entry field.
- Create new, or make modifications to existing routings and bills of material, based on responses to available features and options.
- Formulas can be defined to support the calculation of setup, runtime and pricing. Link the results to other calculations within the configuration.



Sales Order Entry

Customer Service and Sales teams have the responsibility of ensuring that orders for product and services are entered accurately, according to specifications, and identify customer requirements for shipping to ensure that delivery schedules are not jeopardized.

The INDUSTRIOS Sales Order module is designed to assist you in managing the orders you receive from your customers by improving how you are able to classify the orders, review shipping and invoice transactions, monitor and manage communications about the order. At the end of the day, you want to ensure your customer service and sales staff are able to maximize every sales opportunity and improve customer satisfaction.

Classify

- Group sales orders using user defined order types that represent specific characteristics of the order. The sales order type allows you to: define how the sales order numbers will be assigned, identify how user defined fields will be associated and restrict the order to specific types of transactions such as blanket or consignment orders.
- System defined statuses allow you to quickly check the current state of the order. Order statuses include: New, Back Ordered, Fully Shipped and Cancelled.

Record

- Sales order line types allow you to identify the nature of the goods or services ordered. The types include: inventory, non-inventory and comment.
- Record order information using customer specific item numbers.
- Enter the quantity required based on selling units of measure other than how the item is stocked.
- Pricing can be manually recorded, populated using customer specific pricing rules, or by item based pricing. An on-line price look up utility simplifies price history checks.
- Associate the revenue accounts to be charged when the sale is invoiced manually, or based on the following relationships: Salesperson, Territory, Customer Class or Item.
- Charge the appropriate sales tax based on customer or item specific defaults.
- Capture business specific information through user defined fields. You can associate a user defined field group with a specific order type to simplify and standardize the data collection during sales order entry. Associate the fields at the sales order header and at the line level and indicate if these fields will flow to the Shipping Workbench.

Manage

- Confirm sales order details with customers using email or faxing automation.
- Effortlessly manage consignment inventory. Consignment order type rules allow you to manage: whether an invoice will be created for consignment shipments, the transaction types supporting the movement of inventory, and the locations used to manage stock for each consignment customer.
- Easily track releases processed against blanket orders. Rules associated with the blanket order allow you to manage: quantities, pricing, and time horizons for the blanket order.
- Late Orders and Back Order reporting can be automated to quickly identify situations requiring resolution before the customer calls.
- Understand your true customer delivery performance by tracking your actual shipment dates against the required, promised or target ship dates recorded on the order.
- Ensure customer specific shipping rules are followed including Ship Via, Shipping Zone, Service Level, Freight Payment Method, FOB, partial shipments and substitution defaults.

Integrate

- Sales orders can be automatically created from a quote that link back to the quote.
- For make to order environments, production orders can be easily created when the sales orders are entered and status verified with drill downs to the production order details.
- For buy to order environments, purchase orders can be easily created when the sales orders are entered and status verified with drill downs to the purchase order details.
- Associate service and warranty plans, defined in Customer Service Management, with the items ordered to enable automatic updates of items owned and service contracts.



Shipping

From the initial contact to final product delivery, your customer relationships define the basis for your success. Your ability to ship products on time and with the supporting documentation completed accurately and according to customer specification, is as much a reflection of your organization, as is the quality of your products.

The INDUSTRIOS Shipping module provides you with complete online shipping requirements analysis so that you can create your shipment plans, deal more effectively with conflicts, prepare shipping documentation, and ensure that your customers receive their products on time.

Plan

- Identify which sales orders are to be considered for the shipping requirements plan based on required, promise or ship date, order status, or order types.
- Define the planning horizon to be used when determining how to commit inventory to the shipping requirements plan.
- Determine how sales orders flagged as 'no partial shipments' are to be treated in the requirements plan.
- Automatically trigger shipments based on ship to, ship date or commitment status.
- Review the shipping requirements plan from a sales order or item perspective.
- Shipping Requirements Workbenches provide the planner with visibility to all the orders that qualify in the shipment horizon, and the commitment status or availability to ship.
- Easily prioritize the release of orders from Shipping Requirements to the Shipping Workbench using filters that include: Ship Via, Shipping Zone, City, State, Ship Date, etc.
- Focus shipping resources on orders that are due and have stock available to ship. The shipment planning function allows you to manage which shipments are released to shipping for processing and ensure that time is spent on orders that can be filled.

Prepare

- Depending on your environment, create shipments: directly from a sales order, as part of the Shipping Requirements Analysis, or directly from the Shipping Workbench.
- Generate shipment Pick Tickets to identify the goods that need to be picked, where they are located and special shipping instructions.
- Create shipment paperwork including packing slips, proforma invoices, bills of lading, etc.
- Use BarTender® by Seagull Scientific to easily integrate and generate shipping labels as part of the shipment preparation process.
- Inform customers that their order has been processed using email or faxing capabilities.
- Automatically send shipment details to carrier shipping software such as UPS Worldship® or UPS Connect®, eliminate maintenance of multiple customer databases and automate the update of tracking numbers and freight charges on the shipment.

Record

- Quantities picked for the shipment can be recorded manually or automatically defaulted based on the order. Application settings allow you to define the rules for shipping quantities greater than or less than what was ordered.
- Identify the specific serial or lot number of goods shipped to the customer.
- Document specific shipment details including: package types, number of packages and pallets, weight of the shipment, tracking numbers, etc.
- Identify how freight charges are to be processed and any Third Party billing addresses.
- Correct errors easily after the shipment has been posted using Void Shipment.

Go Mobile

- Eliminate the need for paper pick tickets with the use of hand held PC's.
- Reduce shipping errors by scanning bar code labels to verify that the correct parts have been selected for shipping.
- Initiate the printing of shipping documents and labels.
- Update inventory and sales order status in real time by posting transactions directly from handheld PC's.



EDI

Probably the most dynamic and intricate part of managing the sales process, EDI (Electronic Data Interchange) is the electronic exchange of information between business partners in a structured format. The INDUSTRIOS EDI functionality provides the capabilities to exchange a variety of information critical to the planning cycle including streamlining order management, shipment tracking, and payment processing.

Invoicing & Credit Memo Processing

Invoicing within INDUSTRIOS has been designed with integration from sales order through to shipping and accounts receivable, providing the group responsible for posting revenue transactions with a clear view of what has been shipped, what needs to be invoiced, and an opportunity to validate quantities, prices, and miscellaneous charges prior to issuing the invoice. With INDUSTRIOS, you can ensure that your invoices are accurate and guarantee they are a suitable reflection of your company.

Integration

- Data mapping and communication tools work in the background to transmit and receive information from your trading partners.
- Manage data exchange from Softshare ECS® directly through the INDUSTRIOS EDI module.
- Easily control how data is transferred through translation tables already built into INDUSTRIOS.

Automation

- Define your trading partners in INDUSTRIOS, and have the benefit of seamless EDI automation for Sales Orders, Advance Ship Notices and Invoices.
- Post a shipment or an invoice and the system automatically checks if the customer requires an EDI transaction, such as an advanced ship notice, and stages transmission accordingly.
- Ensure accuracy and timely data exchange.

Analyze

- INDUSTRIOS reporting views provide a unique and dynamic reporting capability based on invoice order details, statuses, time horizons, and user-defined fields.
- Review sales orders and shipments related to the invoice through seamless integration.

Record

- Generate invoices automatically from shipments and enter additional charges as required at time of invoicing.
- Process payments against a sales order prior to the goods being shipped using the Pre-Invoice functionality.
- Create one invoice combining multiple shipments for a customer using the consolidation feature.
- Generate a credit memo from a historical invoice and include all or selected lines.

Execute

- Invoices or credit memos can be entered quickly and accurately by taking advantage of standard customer default tables, customer part number references, pricing tables, selling units of measure, and copy order/line commands.
- Distribute invoices automatically through integration to EDI.

Manage

- Tailor documents to customer specific requirements, develop reports to meet internal operational needs and automate report distribution through event-driven messaging.
- Standard forms and listings include invoice listings in detail and summary, invoice, credit memo, statement of account, dunning letter, invoice history listings in detail and summary.



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