

# FMIS SALES ORDER PROCESSING

Efficient processing of quotes, sales, despatch and  
invoicing



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If your current system is stand-alone, inflexible, or lacks effective invoice production and automatic links to your finance system, then now is the time to adopt the FMIS Sales Order Processing system.



### INTEGRATED INFORMATION AND AUTOMATION

Prospects and opportunities can be brought in from your CRM system as a quote within the Sales Order Processing system. All pricing and margin analysis can be held within a common set of templates. A quote can be turned into a sales order and, within systems such as Deltek Vision where project templates are used, the system can create a new project and customer from that sales order. Sales orders can be sourced from purchase orders or stock allocation. If you have the FMIS Production module then the demand can be fulfilled by a production work order, using a complex BOM assembly if required. Quotes and sales orders are subject to version control and full workflow authorisation.

### DESPATCH AND INVOICING

Pick lists, despatch notes and any shipping documents are easily customisable within the system. Drop ship is supported and all delivery and returns are linked into the sales invoice production facility allowing you to easily interface to your accounts receivable or billing systems.

### FEATURE RICH

- Multi-company
- Multi-lingual
- Customisable workflows
- Electronic authorisation
- Complex kitting and assembly
- Drop ship
- Integration with CRM systems
- Quotes
- Sales orders
- Project/job creation from assembly in job cost system
- Auto fulfilment through purchase order, work order or stock/inventory
- Returns from customers
- Sales analysis and margin analysis
- Despatch
- Sales invoice production and finance integration
- Change management and version control

### PRODUCT PRICING AND COMPLEX ASSEMBLY/KITS

- Build bespoke and complex kits and assemblies as sales items
- Hold default vendors and parts pricing
- Record discounts and sales margins

### AUTHORISATION MATRIX

- Role based authorisation limits
- Integration with HR, finance and project roles
- Full workflow management
- Electronic authorisation

### QUOTES

- Customisable quote templates
- Links to Deltek Vision and other job templates
- Integration with CRM packages
- Quote workflow and version control
- Quote generated sales order

## SALES ORDERS

- Final amendment and authorisation
- Auto create any project using templates mapped to sales order in your job cost system
- Tailored sales order print outs
- Electronic delivery of attachments and documents
- Easy status and full history of sales

## DEMAND MANAGEMENT

- Auto allocation of purchase orders to any preferred vendor at agreed discounts and pricing
- Direct pegging of finished goods in Stock or items in Inventory
- Demand generation of production work order/kit build for non-stocked finished goods
- Drop ship management
- Easy drill down for status
- Alerting for any shortfall or problem

## DESPATCH

- Part/full despatch management
- Pick lists, packing notes, shipping and export documentation fully customisable
- Full status visibility

## INVOICING

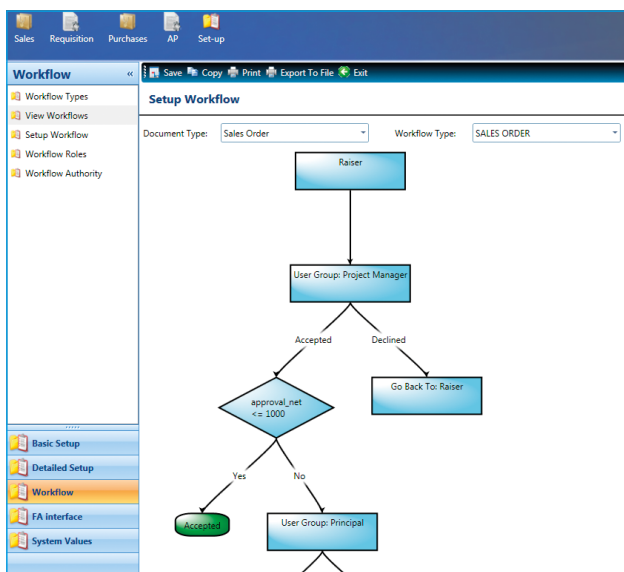
- Full/part invoicing for despatch and drop ship
- Credit note production
- Customisable invoices for multiple needs
- Automatic update to accounts receivable or billing

## REPORTING

- All documents easily customisable
- Base reports can be cloned and modified and marked as customer specific
- Base reports can be linked to particular work flows
- Dashboards and business intelligence

*Workflow management to suit your needs*

*Efficient sales order screens with optional and customisable fields*



The screenshot shows the 'My Sales Order : Sales' screen. It has multiple tabs: 'Order Details', 'Bill / Delivery Address', 'Bill / Delivery Contacts', 'PO Billing / Delivery', 'Internal Notes', and 'Project Analysis'. The 'Order Details' tab is active, showing fields for 'SO Number', 'Version', 'Version Date', 'Customer', 'Name', 'Customer po no', 'Created By', 'Currency', 'Total Cost Value', 'Markup', 'Total Sale Value', and 'Docs Issued?'. The 'Bill / Delivery Address' tab shows fields for 'Project', 'Project Name', 'Phase', 'Task', 'Who Authorises', 'Workflow Type', 'Stage', 'Default Vendor', and 'Default Vendor Name'. The 'Internal Notes' tab shows fields for 'Order date', 'Required By', 'SO T&C', 'opt field 111111111', 'opt field 111111111 222', 'opt field 111111111 333', 'Requester', and 'SO Print Notes'. The 'Project Analysis' tab shows fields for 'Include Notes on PO' and 'SO Print Notes'. Below the tabs is a table with columns: 'Attachment', 'Part No', 'Drop ship', 'Product Details', 'Note', 'Vendor', and 'Vendor Name'. The table contains one row with data: 'FT-910000', 'FT91 New part', 'DML Distribution - S', '11112', and empty cells for 'Note' and 'Vendor'.



*I have found the FMIS Purchasing system easy to learn and really effective in removing paper from our processing. The authorisation and workflow engine has made my life so much easier. The system is really easy to use, efficient and user-friendly.*

Jamie Broughton, **Tesla Exploration International**



*FMIS has provided a very flexible, easy to use and innovative set of solutions for our Seismic Field Operations. Time, Expenses, Rostering, performance statistics and full purchasing and inventory is now available in a very consistent manner cutting out swathes of paperwork we used to use. All of this is accessible in very remote locations with poor web connectivity. We have found FMIS to be a true innovator of solutions to our problems.*

Tracy Bradshaw, **Tesla Exploration**



*The FMIS team has been responsive and enjoyable to work with. FMIS has been collaborative and imaginative in developing solutions for requirements that have evolved during the project.*

Michael Kiess, **Veteran Corps of America**

## WANT TO FIND OUT MORE?

Contact FMIS to arrange a demonstration, ask a question or to discuss your requirements.

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