



Order Entry

the sales order, backorder, and quote management system

CertiflexDimension



Certiflex Dimension Order Entry is a powerful sales order origination, tracking and fulfillment system. Integrating directly with Accounts Receivable, Order Entry provides reporting and control of back orders, shipping documents, and quotes. Quotes and orders can change anytime before they are invoiced. When an order is completed, it automatically becomes an invoice in Accounts Receivable without any duplication of data entry.

The flexible shipping system included in Order Entry adapts easily to your business. Partial orders, shipment tracking, multiple carrier options, complex carton labels and automatic e-mail confirmations with PDF attached packing list and/or invoices can now be just part of the routine day for your shipping department.

Correctly recording, fulfilling and shipping customer orders in the most efficient and cost effective manner can be instrumental in maximizing your profit margins.

The Order Entry system includes an advanced Order Analysis System dedicated to identifying unproductive delays in orders, product lines and shipments. Comparative analysis by day, week and even months can be critical to recognizing potential pitfalls before they become very real troubles. With the Certiflex Dimension Order Entry system, all the answers can be at your finger tips!

Cash Receipts Planning

Anticipated Shipment Schedules

Split and Reschedule Orders

Convert Quotes to Orders

Open Order Histories

Requested Ship Date Tracking

Freight Billing Management

Picking/Packing Slip Generation

Back Order Reports

Carton Label Generator

Change Order/Quote

Unlimited Ship-to Locations

Online Interface to Inventory

Online Interface to Job Cost

Import Outstanding Orders

Email Shipping Confirmations with Attached Packing Lists/Invoices

Record Shipments

Access Contact List

Sales Order Analysis by Period, Week, and Day

Record Shipments

Order No. 0812-002.1 | Allen Disc. Store-12/5/2008 [0812-002.1] | Start

Customer: Allen Rental Store | P.O. Number: 100-134
 Terms: Net 30 Due by 1/17/2009 | Description: Invoice - Order No. 0812-002
 Instructions: Ship Two Day | Ordered On: 12/5/2008 | Salesperson: JJ | Cancel On: 12/25/2008

Shipping & Handling Charge: \$35.25 | Shipping Notes: You may ship UPS Ground since local.
 [F4] Ship Complete | [F5] Carrier/Cartons

Line	Code	Type	Description	UM	Unit Price	Quantity Needed	Quantity Shipped
1	0810	Item	SKU [01-020-100] Hending Ceiling Fan	EA	\$69.95	6.00	5.00
2	0810	Item	SKU [01-020-200] Lang Track Lighting Kit	EA	\$42.95	6.00	6.00

Totals: 2 Line(s) Shipped | 12.00 | 11.00

Options

Email Confirmation: Email with Packing List | Print/Update Options: Print Packing List | Forms | Print/Update Invoice | Forms
 Show Lines: Backorder Only

Buttons: Review Shipping Log, Save, Cancel

Company - 00 | OE24.9a | 12/15/2008

Order Entry: Record Shipment



Transaction Entry

Certiflex Dimension Order Entry data input screens have been optimized to be easy to understand and efficient to operate. The transaction entry screens allow each user to customize the flow of information so that unnecessary key strokes are eliminated.

- › Unlimited orders, quotes, customers, companies
- › Fast, efficient data entry customizable to each users flow of entry.
- › Unlimited ship-to locations per customer
- › Import orders and quotes from third party applications
- › Online interaction with inventory
- › Unlimited sales tax entities
- › Customer specific terms and overrides
- › Sales taxes calculated by customer, item or invoice
- › Spreadsheet, document, and graphic files may be attached to each order or quote
- › Order/Quote archival and reprinting system
- › PDF archival and attachment features
- › Default freight amounts
- › Custom forms generator
- › Duplicate PO checking
- › Default Order/Quote forms by company
- › Preview Order prior to printing
- › Attach a media file to any order/quote

Shipments and Conversions

Certiflex Dimension Order Entry streamlines the process of converting orders to invoices, and quotes to orders.

- › Set order cancellation dates
- › Split and reschedule orders
- › Requested ship date tracking
- › Picking/packing slip generation
- › Carton labeling system
- › Forms Generator
- › Automatic order to invoice conversion
- › Record shipments by line or by total order
- › Calculate quantities available to ship

Reports & Analysis

Certiflex Dimension Order Entry provides a myriad of reports and analytical screens that can be sorted by many factors. The following list identifies a few of the key reports.

- › Sales Orders
- › Quotes
- › Forms Generator
- › Open Orders (by order number, customer number, expected ship date, sales code, inventory item, job)
- › Carrier Report
- › Shipping Labels
- › Completed Orders (by order number, customer number, expected ship date, sales code, inventory item, job)
- › Quotes (by quote number, customer number, sales code, inventory item)
- › Sales Order Analysis by Period
- › Unusual Days to Complete
- › Unusual Days to Ship

Customer Management & Maintenance

Listed below are but a few of the many customer management and maintenance features available when Order Entry is integrated with Certiflex Dimension Accounts Receivable.

- › Unlimited customers, invoices, history, company entities, and jobs
- › Zip code to city verification
- › Drill down on history to see complete detail on corresponding transactions or transaction legs
- › Quick Notes database for each customer
- › File and internet links for each customer
- › Easily copy customer history to spreadsheets
- › Intellitrans feature included to import customer master data
- › Flexible transaction import feature
- › Unlimited contacts on each customer
- › Supervisor only credit hold option
- › Retainage receivables
- › Customer default discounts and early pay incentives
- › Default printing terms
- › Copy customer record to another company
- › Collection messages on statements
- › Commissions by net sales or gross profit made on invoice or payment
- › Complete salesperson commissions system

Order Entry requires the Certiflex Dimension Accounts Receivable and can be integrated with:

- General Ledger
- Job Cost
- Inventory