CONTROL – Order Entry & Invoicing

INTRODUCTION

CONTROL Order Entry & Invoicing is a comprehensive system that is simple-to-use, requiring minimal keystrokes for any operation and thus enables fast and efficient processing of all orders.

Daily benefits include the ability to easily track and manage orders, deliveries, repairs, invoices, returns, and more – while giving you full access to customer details at the touch of a button.

Important business benefits include improved cashflow and more satisfied customers.

The CONTROL Order Entry & Invoicing module **integrates fully with the Merchandising, Inventory Management, Online Store, Replenishment, Customer Management and Accounting** modules.

CONTROL Order Entry & Invoicing module provides extensive functionality such as:

> Customer Based Functionality
> Customer Orders and Repair Orders
> Easy Item Selection
> Enquiry Facilities
> Item Pricing & Promotions
> Special Product Types
> Discount Vouchers
> Deliveries
> Returns
> Transaction Docket Printing
> Credit Control
> Quotations
> Operator Restrictions
> Management Functions
> Other Features

CONTROL Order Entry & Invoicing can operate on standard PC equipment as well as on Ipads and Android tablets, and even Iphones and Android phones.

CONTROL ORDER ENTRY & INVOICING FEATURES

Sophisticated Customer Management

Order Entry& Invoicing comes with extensive customer functionality, such as

> Customers already in the system can be selected by:

– "Customer code"
– Company name
– Contact name,
– phone number,
– town or city,

or any part of these fields. If the entered details match more than one customer in the database, then you are presented with a list of matches and can choose one.

> A customer can be selected at any time during a transaction

> There can be an unlimited number of delivery addresses pre-recorded for customers, or you can alter the delivery address for a special delivery.

> New customer accounts can be created (with zero or limited credit) while processing a transaction. Details you can capture include:

– name,
– address,
– phone numbers,
– email address,
– configurable customer demographics, e.g. mailing list subscriber, favourite colour, etc.
– birthdays and anniversaries

> Depending on configuration options when a customer is selected, you are immediately prompted with:

– credit status
– details of the customer's most recent purchases
– current public notes on the customer
– details of any birthday or anniversary around the current date
– customer specific and customer group pricing
– loyalty points accumulation, redemption and reporting

Easy-to-use yet advanced Customer Order and Repair Order facility

> To reduce training requirements and errors, customer order, invoice and cash sale entry are very similar.

> Specifics of an item can be recorded by selecting the item and then choosing from the lists of options available, or if allowed, by altering the description of the item. Any altered description will only affect the current transaction.

> Other special requirements can be recorded by adding detailed notes or even images (diagrams, etc.) to the order.

> CONTROL will calculate a default order completion date which can be altered if required. CONTROL can be configured to allow order completion dates to be specified per line.

> For items available in multiple options, you are prompted to select from the list(s) of available options, after choosing such an item. The price of the item is determined after all the options have been selected.

> While entering a customer order line, you can:

  – Commit stock on hand to the customer order line,

  – Commit stock on purchase order that is not already committed to other customer orders, to this customer order line

  – Don't commit any stock to the customer order line

> Customers can be automatically notified by SMS or email of a change in their customer order, .e.g. when the customer order is ready for collection.

> CONTROL allows for a customer order to be cloned and altered. For example, a stationery supplier creates a "standard" customer order for the stationery requirements for students for each year of the local primary school. If a parent of a year 6 student contacts the stationery supplier, they clone the "standard" order for year 6 and make alterations if required (and take payment for the customer specific order). The order can be assembled and then sent to the school, or picked up by the parent.

> Items can be marked as "taken" while entering the customer order. After completion of the customer order, including taking a payment and printing the details of the customer order (including the items marked as taken), the taken items will then be marked as sold and no longer outstanding in the customer order.

> The status of customer and repair orders can be maintained, queried and reported on by staff responsible for this area.

> Supplier purchase orders or inter-location (store or warehouse) transfer requests may be generated to fill customer orders.

> When processing stock received from a supplier, warehouse or other store, you are also prompted when processing an item required for a customer order, and the subsequent receipts summary will include details of all customer orders waiting for the items just received.

> Depending on management policy, customer orders can be part supplied.

> Powerful and yet easy-to-use customer order/purchase order enquiry facilities are available to authorised personnel.

> Comprehensive reporting of customer orders is available including outstanding customer orders sorted by transaction date or due date, orders ready to finalise, part-supplied orders, etc.

> Orders placed through our integrated online e-store will appear as fully paid customer orders, and can be handled like any other customer order.

> When a customer order is cancelled, a cancellation fee can be calculated based on configuration parameters and deducted from the payments made. The balance of the amounts paid can be refunded to the customer or a credit voucher can be generated for the balance.

> An online "form" containing the additional details that need to be recorded for a repair order (e.g. condition of item being repaired, any accessories attached, etc.) can be completely configured without any programming.

Item Selection made fast and easy

> Items can be selected by:

    – Entering any part of the barcode, internal product code or supplier's product code

    – Scanning a barcode (manufacturer's or internally printed barcode)

    – Entering one or more words or partial words, in any order, from the item description, (or "comment" field)

    – Entry of one of the product groups that the item belongs to

    – Entry of combinations of the above

> If the entered data results in more than one match, then a list of matching items, complete with images of the items, if available, is displayed and you can choose the required item.

> If the selected item comes in multiple variations, e.g. multiple colours and/or sizes, then you are shown the list(s) of available variations and must choose specific option(s) from the list(s).

> Panels of buttons containing product images (or product names) can be displayed on a touch screen and you can choose one of these by simply pressing the appropriate button.

> If the button represents a single item, then that item is selected. If the image represents multiple items, then a new panel of product choices will be displayed.

> There is no limit to the level of nested item panels.

Provide great customer service with Comprehensive Enquiry facilities

While entering customer transactions, CONTROL's enquiry facilities include:

> Stock availability in the current store and other stores, warehouses and associated companies

> Detailed notes on products e.g. warranty conditions, care instructions, etc.

> Associated products – other items in the family, spare parts, etc.

> Detailed notes on customers which can also be updated while entering a customer transaction

> Details of other customer orders for the selected customer

> Alternative/superseded product information.

> Special customer pricing.

Item Pricing and Promotions – fully controlled across different stores

> The "standard" price for an item can vary based on the store, the state, the customer purchasing the item or on a current promotion.

> Prices can be inclusive or exclusive of tax. Specific items and customers can be set as tax exempt.

> Special customer pricing is applied automatically.

> Promotions can be applied automatically

OR

> You can be prompted when the conditions of one or more promotions have been met. You can then consult the customer to confirm that a promotion should be applied, and if more than one promotion is available, to choose one.

> Staff-initiated discounts and price overrides, either on a per line or whole transaction basis can be controlled as follows:

– A discount beyond an individual sales assistant's limit (which may be zero) requires the authorisation by a person that has the authority to give the discount.

– The maximum discount that can be offered may be based on the customer buying the item.

– The sales assistant can be forced to enter a discount reason for any 'operator initiated' discount or price override.

Use Discount Vouchers to increase sales

> Discount vouchers can be for a discount amount or a discount percentage.

> Discount vouchers can be generated as a result of a sale that meets the conditions of a discount voucher promotion.

> Discount vouchers can be delivered to a customer by SMS, email or printed.

> Discount vouchers are validated at time of redemption, and can only be redeemed once.

> Groups of items can be excluded from the effect of a discount voucher.

> Sales assistants or managers with the appropriate authorisation level can override the total value of a transaction or apply an overall discount.

> When the transaction is completed, overall discounts will be applied on a pro-rata basis across all discountable items.

> The reporting available for discount vouchers is similar to the reporting available for gift vouchers

CONTROL Enables a Variety of 'Special Product' Types

> You have access to full style, colour and size (and sub-size) facilities. If you choose an item (style) that is available in multiple colours and/or sizes, CONTROL will prompt you to choose a colour and/or size. All colours and sizes can be the same price, or particular colours and/or sizes can have different prices.

> Items specified as serial numbered stock require the entry of a valid serial number.

> You have the ability to sell product packages or kits made from other products. This includes configuration options that control whether kit components can be substituted at the time of recording a sale or customer order, and also adjust the price of the package or kit based on the substituted components.

> You have the ability to sell a customised product by specifying a base product and then selecting from lists of possible options or attributes.

> Services or generic products can be sold by selecting a representative product and then entering or modifying the product description and/or price.

> Groups of items can be configured so that when such an item is sold, the operator receives a message on the screen, e.g. "Don't forget to offer extended warranty with that item".

> The warranty period can be defined for a group of items. When one of these items is sold, CONTROL will calculate the warranty expiry date for the item sold.

> Items such as service or labour can be configured as non-diminishing, which means the quantity will never go below zero or appear on any reorder report.

> If you select a batch controlled item and there is more than one batch currently with stock then you must specify which batch the sold item is from.

Ensure accurate, prompt and quality delivery

> Instructions can be retrieved from customer record, if these details exist, or they can be entered or altered for a specific delivery.

> Corporate customers can have multiple delivery addresses established in the system.

> The total weight and or size (volume) of a transaction can be calculated and displayed while the transaction is being entered.

> You can enter a delivery charge or CONTROL can suggest a delivery charge based on the delivery zone, the total weight or size of the items to be delivered, or a combination of these. This delivery charge can be modified by you.

> If you are doing your own deliveries, the current delivery schedule can be reviewed before the sales assistant adds a new customer order to the schedule.

> The customer orders in the delivery schedule will be sorted by the "zone" (can be postcode) of the delivery addresses.

Ensure correct policies and procedures are followed with Returns

> If the original sale number is not known and depending on company policy, a return can be processed without reference to the original sale transaction; or easy-to-use search facilities are provided to find the original sale transaction by customer, or by stock item.

> Depending on the return reason selected, CONTROL may place the returned item into a location other than the current store's saleable stock. For example, if the return reason is "Faulty item", then instead of the item being returned to saleable stock, it is placed in the "faulty stock" location.

> Refunds beyond an individual sales assistant's limit (which may be zero) require the authorisation by a staff member with the appropriate level of authority.

> CONTROL can be configured to allow for an item to be sold while processing a return, e.g. it is an exchange transaction, or a returned item can be processed during a sales transaction.

> Items can be marked as non-returnable.

> Items can be marked as rental, in which case when they are returned the rental fee is not refundable (the security deposit may still be refundable).

> You may be prompted with a special message when certain items are returned, e.g. "check all components are in the box".

Increase visibility, management and control over multi-stores' stock location

CONTROL can be configured to provide:
> Details of stock available in other stores and warehouses.
> Selection of another store or warehouse for fulfillment of one or more items on a customer order (or sale)

Authorised personnel can:
> process a transfer to another store or a warehouse, producing the required documentation.
> generate a transfer request on another store or a warehouse.
> receive stock sent from another store, a warehouse or from a supplier.

Sophisticated Transaction Docket printing

> There are a number of "standard" docket layouts, which can be customised to suit individual requirements.
> Special conditions and messages can be specified for each transaction type. For example, a sale might include a sales message and return conditions; a special customer order could include conditions relating to that transaction type.
> Special notes can be pre-recorded and any one of these can be chosen to print on selected dockets. (E.g. for special warranty conditions, product care details, etc.)
> The docket style and printer used can be dependent on the type of the transaction, e.g. customer orders are printed on a laser printer in an A4 layout, but cash sales are printed on a continuous roll printer.
> The number of copies can be configured for each transaction type.

> You can select to reprint a copy of the most recent transaction, or to send a copy by email. All copies are clearly marked as such.
> Authorised staff can reprint or email copies of previous transactions.

Manage credit control easily

A customer's credit status is checked as the customer's account is selected and as each line is entered.

> Credit checks cover:

– current account balance against credit limit

– the number of days current invoices are outstanding

– whether the customer has been flagged as being on "hold supply".

Only customers that have a credit limit defined and good credit status can buy on credit.

A comprehensive Quotation system

CONTROL comes with a full quotation system including the ability to convert a quotation into a customer order or a sale. Quotations can include a quote expiry date.

Tightly control level of staff authority

Depending on configuration options, a variety of restrictions can apply, including:

> Enter only certain transaction types

> Only operate in a specified location

> Limited or no ability to give a discount

> Limited or no ability to process a return

> Disallow altering of details of existing customers

> Disallow altering or cancelling a transaction after it is commenced

Special features for Store Mangers only

Managers can be authorised to perform any of the following functions:

> Reprint a sale or other transaction

> Provide a higher level of discount

> Enter the transaction date (for entering sales that were transacted away from the system)

> View the gross profit while preparing a quote or special customer order.

Other Valuable features

> A transaction can be suspended, other functions performed, then the suspended transaction recalled for completion. Transactions can be suspended on one workstation and recalled on another, by the same or different person. There is no limit to the number of transactions that can be suspended. CONTROL can also be configured to automatically cancel suspended transactions at the end of the day.

> Notes can be added to individual transaction lines or to the overall transaction.

> CONTROL comes with password control for access to store manager functions.

> You can utilise an operator code with each entry or operate in cashier mode.

> You have the ability to record the operator, salesperson and authorising person on a transaction.

> Sales staff can be required to complete customer survey questions at the end of each sale. Examples of questions might be:

   – Postal code

   – Gender of customer

   – Approximate age group of the customer.

> Hundreds of configuration options allow the Order Entry & Invoicing module to be tailored to your requirements without programming.

SUMMARY

CONTROL's Order Entry & Invoicing module is a centralised system that helps streamline processes from order taking to delivery. Sophisticated, yet easy to use, it can minimise order entry errors and paperwork, reduce costs, improve customer service, increase revenue and provide competitive advantage.

Significantly, CONTROL Order Entry & Invoicing has been designed by Creative Computing, a retail software vendor of more than 25 years where we aim to deliver practical retail software innovations that assist retailers to compete better locally and internationally.