

Invoicing/ Order Entry

The entire accounting cycle begins with the order, making this one of the most critical parts of your business. DataWeld's ORDER ENTRY SYSTEM makes sure you get started on the right foot.

To begin with, you have two choices. You can process the order when the driver returns the hand written delivery tickets at the end of the day. The other option is to create and print a delivery ticket prior to the driver leaving on his route.

If you elect to process the delivery tickets after the driver returns from his route, you simply enter the customer name or account number, the number and type of cylinders shipped and returned and any hardgoods sold. From this one transaction, the customer's receivable account is updated, cylinder transactions are updated and stored for end of month Rental Invoices and Inventory is automatically reduced.

If you want the system to create a delivery ticket, you follow a similar procedure. You start by typing in the customer's name or his account number. The ORDER ENTRY SYSTEM is also very easy to get along with. You can type in part of the customer's name and the system will let you scan through the customer base until you find the correct customer. The same procedure can be followed if a customer has multiple ship-to addresses. It's easy, quick and you don't have to remember account numbers.

The ORDER ENTRY SYSTEM also makes life simpler in several other ways. If the ship-to address is different than the sold-to address, it automatically begins tracking cylinders by the ship-to address. This is very helpful when you have one company with cylinders in several locations.

Blanket purchase order numbers are also maintained and displayed on the screen for verification. Taxes are automatically calculated based on where the product is being shipped.

When you begin entering line items for the order, the flexibility of DataWeld's ORDER ENTRY SYSTEM really begins to shine through.

I DON'T REMEMBER THE STOCK NUMBER.

No problem, simply type in part of the description and the system will show you all stock numbers with description similar to the one you entered. Scan through the choices on the screen to find the one you want and select it by pushing one button. That item is automatically entered into the order. You NEVER have to enter a stock number!

This feature also gives you the choice of scanning through your inventory by stock number, description or vendor, whichever is easiest for you. If your customer will only buy Lincoln welding rods, you could enter the description, tell the system to scan by vendor and all of your Lincoln rods would be conveniently grouped together.

HOW MANY DO YOU HAVE IN STOCK?

Each time you enter a line item on an order, the system automatically checks the available balance and displays it on the screen. To help maintain a high level of customer service, substitute stock is also shown on the screen.

What if you don't have enough stock to fill the customer's needs? Simple. Displayed at the bottom of the screen is the quantity available for sale from the next order you have coming in from your supplier and when you expect to

receive that order. This makes it easy for the salesman to confidently say "I can give you 5 of those now, and deliver the remaining 4 to you on Friday".

CAN I HANDLE SPECIAL PRICING FOR A CUSTOMER?

Not only does the system handle level pricing and pricing based on quantity breaks, but the ORDER ENTRY SYSTEM offers simple to establish, yet very flexible special pricing options.

Customer Special pricing can be established in a multitude of ways. First, you can establish the special pricing for the Sold To Account or even have different prices for different Ship To Account locations. This feature is valuable when you quote special prices for different job sites for the same customer.

You can establish pricing for a customer on all the items he buys: items he buys from a selected vendor, items he buys in a special inventory class or category, or a special price just for one item. The special price you set up can be a unique price, a percentage off retail or above cost, a dollar amount off retail or above cost, and many more!

The best part of special pricing is that the ORDER ENTRY SYSTEM will automatically select the correct price for you! The program will even blink a special message just below the price to let the salesman know that this is a specially quoted price. Automatic pricing like this speeds up the order entry process and insures you and your customer of accurate pricing.

HOW MUCH DID I PAY FOR THAT LAST HELMET?

A simple, common question but the answer may not be so easy to find....Unless you have

DataWeld's ORDER ENTRY SYSTEM. Each time you enter a stock item or cylinder, the system will show you the last time you sold the customer that item, how much he paid for it, even how many he bought! No more searching through months of delivery tickets. The information is there each and every time you enter an order, without even having to ask. This type of flexibility will simplify day to day activities, speed up your order processing and help you maintain the high level of customer service you desire.

SHIP ME TWO CYLINDERS.

Sometimes a customer wants you to ship him more cylinders but he doesn't know what you shipped him last time. No problem. Push one button and in seconds you see that you have been shipping him 251 cubic foot Oxygen cylinders. Depress one more button and the Oxygen cylinders become part of the order!

Once the order is complete, the delivery ticket is printed. The delivery ticket can be sent to any printer in the building. Should you decide to put a printer in the warehouse, you can enter the order and print it in the warehouse, allowing orders to be filled quickly and efficiently.

All delivery tickets confirm to the Department of Transportation guidelines regarding transportation of hazardous materials. A description is printed below each gas, indicating whether it is flammable or non-flammable. An X prints in the Hazardous Materials column and the appropriate DOT number for each gas appears in the correct format.

When the delivery ticket is returned at the end of the day, all you have to do is enter the number of cylinders you picked up and any adjustments. It then becomes an invoice.

CAN I SCHEDULE FUTURE OR RECURRING DELIVERIES?

Absolutely! With the Scheduled Delivery feature of order entry you have a tool which promotes top-notch service and keeps your clerical work to a minimum at the same time. You can enter a standing customer order which will automatically generate a delivery ticket on the day or days you specify.

For example, one of your customers wants you to deliver 500 pounds of welding rods on the 1st of each month. Enter the order once, specifying the delivery schedule, and the system will generate a delivery ticket on the first of each and every month.

The Scheduled Delivery feature is flexible, too. You can specify deliveries to be made on a specified future date, days of the month, or even days of the week. You don't have to worry about a future delivery falling through the cracks, you'll be on time every time!

WE CHARGE FOR DELIVERY.

Then you'll love the way DataWeld's ORDER ENTRY SYSTEM takes care of delivery charges. You selectively establish what delivery charge will automatically be applied to a customer based on distance or other variables you select.

For cylinders you have just as much flexibility. You selectively charge the rate you want based on cubic footage of gas sold, the number of cylinders delivered, or the number and type of cylinders delivered. Of course the system will calculate and add the delivery charges to the invoice automatically for you.

WHAT ABOUT QUOTATIONS?

Quotations are fully integrated with the ORDER ENTRY SYSTEM. In fact, delivery

tickets, charges sales, cash sales, and quotes are all entered using the same easy to use program. Need to change a quote to an order? No problem. In just seconds you can change the ticket type from a quote to an order.

WE SHIP A LOT WITH UPS.

DataWeld's UPS Processing feature allows you to generate UPS shipping labels and automatically interfaces into the billing system. By keying in the delivery ticket number, quantity of boxes and weight, the system will generate the necessary shipping labels for you. Standard and C.O.D. labels are both handled by the system.

Regular, next day, or 2nd day shipments are all handled easily and quickly. The system calculates the correct UPS charges and updates the customer's invoice automatically! Need to expedite your shipping process and make sure changes are accurately posted? The UPS Processing feature can do the job.

DataWeld's ORDER ENTRY SYSTEM speeds up and simplifies the order entry process. In a day and age when everything seems to be getting more complicated, isn't it nice to find something that makes a part of your business less complicated?

ADDITIONAL FEATURES

1. Unattended nightly processing of end of day updates is available. Multiple companies and branches can all be easily updated using the nightly processing feature.
2. Up to 100 line items are allowed on each invoice or quote. Both stock and non-stock items are efficiently handled by the system. Any number of lengthy comment lines can be inserted at any place on a ticket.

3. Serial numbered items can be entered at point of sale and tracked by the system. Inquiries and reports are available to allow you to quickly see when an item was purchased, who bought it and what invoice number it was billed on.

4. Material Certification Sheets, detailing the specifications on items such as welding rods, can be printed by the system. The Order Entry program will alert the operator when a sheet is required.

5. Both Kit and Assembly items are handled by the system. The Order Entry program can quickly display all the components which make up a kit or assembly. It will even alert the operator if insufficient components are in stock to assemble the number of kits being ordered.

6. A Delayed Billing Feature is improved. This allows you to group multiple delivery tickets for a customer on one invoice. The length of time between billings is determined by you. This feature can significantly reduce the number of invoices sent to a high volume customer, thereby reducing paper handling and postage.

7. Extensive audit features are provided. At any time you can key in a ticket number and find out where it is in the system. For example, after keying in a ticket number you are looking for the system might respond that it is a Cash Invoice. When it was originally entered into the system, and at which terminal it was entered would also show. Any changes to the ticket will update the audit record.

8. Complete invoice details maintained for each invoice. An invoice can quickly be reprinted to provide another copy if requested by the customer.

9. Total integration with the backorder and purchasing modules is provided. At point of order, any backordered item will immediately show up in the purchasing system.

10. Automatic credit checking is provided at point of order to alert the salesman that the account is past due and/or over their credit limit. Customers can be coded to disallow any further sales activity on their account.

REPORTS

1. **DAILY SALES REPORT** The Daily Sales Report shows a summary or detailed recap of each days business. The number of invoices processed, total sales, total cost, gross profit, and profit percent are shown. You can select to look at one day or a range of days for any month or year.

2. **BILLING HISTORY REPORT** The Billing History Report shows every item that a customer has been buying from you and how many they have bought over the last 12 months. This is a great tool for a salesman to see exactly what a customer is and is not buying. You can also input an inventory stock number and the report will show you every customer who has ever purchased the item.

3. **SALES ANALYSIS** There are multiple versions of the Sales Analysis Report. Each report can provide detailed sales by individual invoice line item. Item sold, quantity, cost, selling price, gross profit, and profit percentage are all reported. The report allows you to evaluate sales from these perspectives:

Salesman Analysis
Territory Analysis
Customer Analysis
Product Analysis
Vendor Analysis

Summary or detailed reports can be printed for the current and prior month's business.

4. SALES ANALYSIS BY CLASS The Sales Analysis by Class report offers a summary look at sales performance and profitability by inventory classification. The Analysis can be printed in one of three ways -- in customer order, in salesman order, or in inventory class order.