

ACTIVANT CUSTOMER ORDER MANAGEMENT



MANAGE SPECIAL ORDER FULFILLMENT SMOOTHLY AND EFFICIENTLY

Are you using manual processes to create and fulfill special orders? Without an integrated solution, managing special orders can be costly, time-consuming, labor-intensive and error-prone.

Customer Order Management (COM) integrates and streamlines the special order process so that you can easily source items, track delivery and fulfill orders. The order flow is straightforward: when a customer requests an item that is backordered or not stocked, the system displays a sourcing menu with a variety of options. You can buy the product outside, transfer it from another location, place the item on the Buyer's List, create a new purchase order or substitute a similar item. You can charge a deposit, and have the item shipped directly to the customer or received into inventory.

COM provides detailed history for each order, including price changes and delivery dates. You can also add electronic notes that are permanently "attached" to the order. Build customer relationships by individualizing customer accounts with shipping preferences and instructions to allow substitutes, back orders or partial shipments.

In addition, COM helps you proactively manage orders through system alerts that notify you of important changes and events. COM automatically places orders on hold if the customer exceeds his credit limit or if the item is delayed beyond an established date.

With COM, you'll no longer view special orders as a time-consuming headache. Instead, you'll eagerly order what the customer needs, track the order and answer status inquiries without delay. COM brings smooth, efficient automation to the special order process that encourages customer loyalty, builds supplemental revenue stream and increases profits.

BENEFITS

- Create special orders easily with an automated sourcing menu
- Place items on the Buyer's list to take advantage of volume discounts
- Ship directly to customers to reduce time-to-pay and eliminate receiving tasks
- Increase customer satisfaction by eliminating uncertainty and dropped orders

KEY **BENEFITS** OF CUSTOMER ORDER MANAGEMENT

Raise Service Levels by Ordering What Your Customers Need at the Best Price

- Special order individual items within an estimate, a quote or even a POS transaction
- Check your available inventory automatically
- Follow prompts for special orders when items are not in stock
- Automatically display Sourcing Menu for not-in-stock items
- Choose source from buyout, transfer, Buyer's List, purchase order or substitute an equivalent item
- Add sales order description lines that automatically follow the item throughout the special order process

Manage Customer Balances to Protect Profits

- Calculate available credit for customers based on their order balance
- Automatically calculate deposit amount at the time of sale
- Hold orders when credit limit is exceeded, the price is below expected margin, or the order is past due, etc.
- Print the customers' part numbers on customer-facing documents
- Invoice the customer immediately after fulfillment or as part of a batch

Track Orders and Respond to Customer Inquiries Quickly Using the Viewer Screens

- Track salesperson information for accountability
- View all order information including item description, order date, due date and receipt details
- Add unlimited free-form notes, including the name of the customer requesting changes
- Quickly add special order items to your inventory file for future sales tracking

Receive Special Orders with the Same Ease as Your Regular Inventory

- Add notes to each order, such as date and time customer was notified that the order arrived
- Add warehouse storage location codes in receiving for merchandise retrieval
- Specify delivery dates at the item level, even for projects spanning several months
- Customize shipping preferences for each customer
- Auto-post freight to an order with markup based on your customized freight table

Manage Orders and Backorders with Greater Accuracy Using Powerful New Options

- Take advantage of customer-level flagging that indicates whether a specific customer allows substitutes, back orders or partial orders
- Respond to alerts on events such as item received, item not sourced, etc.
- Print special order labels
- Improve efficiency and accuracy with automated processes
- Automatically place back-ordered items on the Buyer's List
- Move back-ordered items to "on order" status only when the quantity available meets demand
- Automatically place quantities exceeding availability on back order

ABOUT ACTIVANT

Activant, a leading technology provider of business management solutions serving small and medium-sized businesses, offers customers tailored proprietary software, professional services, content, supply chain connectivity, and analytics. Activant's systems are designed to help customers increase sales, boost productivity, operate more cost-efficiently, improve inventory turns and enhance trading partner relationships.

To learn more about this or other Activant products and services, please call 800.538.8597.



ACTIVANT

Activant Solutions Inc. • 7683 Southfront Road • Livermore CA 94551
Phone: 888.448.2636 • E-mail: industry.marketing@activant.com • www.activant.com

© 2006 Activant Solutions Inc. All rights reserved. Activant, Activant Eagle and the Activant logo are registered trademarks of Activant Solutions Inc. All other company or product names are trademarks or registered trademarks of their respective companies.

07EDSCOM