

Sales

Microsoft® Business Solutions Small Business Financials North America Edition

Improve efficiency and increase customer satisfaction with Microsoft® Business Solutions Small Business Financials. Streamlined sales processes enable employees to process and fulfill orders smoothly, while robust integration and reporting capabilities turn sales information and customer data into a powerful business tool.

Streamlined sales processes help you serve customers more effectively and ensure efficiency and accuracy.

Handle shortages effectively by canceling or backordering item quantities.

Quickly create a customer invoice from your sales order information without additional data entry.

The screenshot displays the Microsoft Business Solutions Small Business Financials software interface. The main window shows an 'Orders' form with the following details:

- Order No.: ORD00021
- Date: 12/15/2004
- Customer ID: CDHOSPOR0001
- Customer Name: Coho Sports
- Address: 2345 Center Ave., Arlington, IL 12345
- Item List:

Item Number	Description	Quantity	Unit Price	Ext. Price
S1320	Authentic Major League Baseball Bat	40	\$275.00	\$11,000.00

Below the order form, a 'Screen Output - SOP Blank Order Form' window is open, showing a printed invoice for 'Wide World Importers (Sample)'. The invoice includes:

- Customer Address: 1234 Main St., Fargo ND 32801
- Bill To: Coho Sports, 2345 Center Ave., Arlington IL 12345
- Ship To: Coho Sports, 2345 Center Ave., Arlington IL 12345
- Order: ORD00021
- Date: 12/15/2004
- Page: 1

At the bottom of the invoice, a table summarizes the order items:

Purchase Order No.	Customer ID	Salesperson ID	Shipping Method	Payment Terms	Req Ship Date			
Ordered	Shipped	B/O	Item Number	Description	Discount	Unit Price	Ext. Price	
40	0	0	18	S1320	Authentic Major League Baseball Bat	\$0.00	\$275.00	\$11,000.00
20	0	0	0	S1600	Hockey Stick	\$0.00	\$23.99	\$479.98
20	0	0	20	S1610	Hockey Crosse	\$0.00	\$30.00	\$600.00

Provide customers with accurate order details on the order, including quantities ordered, shipped, and backordered.

Send printed or e-mail invoices, which can be personalized to reflect your business identity.

Seamlessly manage sales processes

With flexible sales functionality that includes integrated quotes, orders, back orders, drop shipments, invoices, item receipts, and payments, employees can manage the sales process efficiently and consistently, saving time and reducing the need for data re-entry.

Serve customers more effectively

Enhance customer relationships and reward top customers with multiple pricing levels, trade discounts, and line item markdowns. Fulfill orders promptly using drop ship sales orders, and improve accuracy with packing slips, picking tickets, and the ability to print historical sales documents.

Know your customer

Maintain a complete, customized view of customer data, including credit limits and transaction history. Easily track histories to identify top customers.

Increase sales

Extend sales and marketing efforts by generating personalized letters and campaigns in Microsoft Word and reaching new and existing customers through Microsoft bCentral Web services, such as bCentral Commerce Manager.

Access and analyze sales data

View and analyze the exact information you need to manage cash flow, sales, payments, customer activity, and sales commissions, using comprehensive reporting and inquiry tools and robust integration with Microsoft Excel.

SETUP**Customer setup**

Input and track customer information at any time, including multiple and unlimited addresses, payment terms, finance charge, credit card, and complete history information.

Customer maintenance

Easily look up existing customer information. View and change information for one transaction, or save changes to update automatically throughout the accounting system.

Credit limits

Define individual customer credit limits and receive alerts when limits are close to being exceeded.

Transaction import

Easily import customer records, beginning balances and transactions into Microsoft Small Business Financials.

DAILY**Streamlined processing**

Easily transfer quotes to invoices, as well as accept deposits.

Customer-specific pricing and trade discounts

Apply multiple pricing levels to sales items and assign a level to a specific customer. Check credit limits, and set up trade discounts for preferred customers.

Line item markdowns

Reduce prices for specific customers on a line item as a set amount or percentage of the price.

Backorders

Create sales orders without having specific line items in stock, with options to backorder or cancel orders. The backorder quantity is tracked and filled when inventory is replenished.

Drop ship orders

Fill orders quickly by shipping directly from your vendor to a customer without receiving or selling from inventory.

Apply payments

Apply receipt of payment via cash, check, or credit card to a specific invoice or to the overall customer balance. Assess NSF and finance charges according to your business rules.

Packing slips and picking tickets

Print packing slips to accompany each order and invoice, as well as picking tickets for orders, invoices, and returns. Print or e-mail slips and tickets individually or as a group.

Partial invoicing

Transfer partial kit quantities to an invoice while tracking component backorders and fulfillment.

PERIODIC**Customized statements**

Tailor statements using a step-by-step wizard, which allows you to preview and verify information before printing.

Letter Writing Assistant

Integration with Microsoft Word lets you quickly generate collection, thank-you, and survey letters or create your own letter templates.

Reminders and alerts

Automated reminders prompt you before customer payments are due or when they are overdue, while alerts prompt you about bills to pay or overdue invoices.

REPORTING**Flexible reporting options**

View unposted, posted and historical transactions, plus complete customer data, period sales, and yearly sales information in reports such as Customer Balance, Customer Contact List, NSF Customers, and This Month's Sales. Easily print historical sales documents.

Sales tax reporting

Track state, local, and other sales taxes for full sales tax reporting.

Sales commissions

View commissioned sales and generate up-to-date commission reports using Microsoft Excel.

Export to Excel

Export reports and SmartList query results to Excel for advanced sales analyses and create graphical reports using pie graphs, charts, and other visual tools.