

"Steel Formed, Steel Specific"

## SALES ORDER MANAGEMENT

**SEMS Sales Order Management provides the tools to capture orders and inquiries for metal products quickly, reliably and accurately to ensure customer satisfaction, with the added benefits of reduced error rates, processing time, paperwork and ultimately cost. Our software gives a customer service representative the tools to enter, price and quote a delivery date for an order while the customer is on the phone. The production or shipping status of any order can easily be tracked by a sales representative or even by the customer via our secure Internet ready interface, 24 hours a day, seven days a week.**

### Features

- Quick response time: Reduction in the time to determine delivery dates for standard products from days to over the phone, or on-line during the order inquiry request.
- Order amendments: Where an order change is requested and approved, we provide the facilities to determine the status of the order (to figure out if the change is feasible), re-plan and reschedule based on the current status of the order.
- Pricing: Reduction of time to price an inquiry for standard products while providing on-line instant feedback during the inquiry process.
- Product definition: A depository of specifications, including AISI, ASTM, custom specifications, definition of grades, product catalogue, and testing rules.
- Standard orders: The order inquiry system is designed to automatically handle standard orders, including pricing, promise date calculation, order entry and order confirmations. The order is then entered into the production plan and production capacity can be allocated, or held waiting for receipt of the confirming purchase order.
- Custom and non-standard orders: The order entry system allows for entering custom orders into the system. As these may require discussions by technical staff they are routed to those areas to address specifics of the inquiry with the customer and allow for easy entry into the production cycle.
- New inquiries can be entered, priced, planned and confirmed while the customer is on the phone. Rapid turn around of inquiries helps to build customer satisfaction, and can lead to higher inquiry capture rates.
- All fields can be validated using user-defined rules, and lists of values are used extensively to virtually eliminate clerical errors.
- Shipping and billing details are entered automatically from the customer's profile.
- Taxes, duties and estimated freight charges are calculated automatically.
- Quickly review customer's credit status. Approvals can be granted automatically, or by authorized users.

- Line items are rich in steel-industry specific detail, including product type, end usage, final product shape, dimensions and tolerances, grade, quality, specifications, special chemistry requests, special tests. Each line item can have a distinct shipping destination.
- Line items can be priced automatically, and the standard cost is calculated to determine the potential profit margin on any order.
- Advanced automatic and manual stock search capabilities to fulfill orders quickly.
- Reserve stock, purchases or Advanced Shipping Notices (ASN) directly to any line item.
- Support is provided to manage third party inventories.
- Create and manage complex Work Instructions for manufactured or value added products. Standardized Work Instructions can be attached to customer parts.
- Corrective actions may be suggested for inquiries that exceed or violate company policy.
- Inquiries can be set to expire automatically if not confirmed within a specified number of business days.
- System handles multiple units of measure.
- Sales orders are generated upon confirmation of the inquiry. The confirmation report can be automatically sent to the customer via email or fax.
- Any existing sales order can be used as a template for new orders or inquiries. Query-by-example search tools are provided to quickly look-up sample orders.
- Inquiries or sales orders can be priced automatically as soon as they are entered into the system.
- Pricing components may be based on any sales order property, including freight, quality, alloys, special packaging, tests, and other surcharges.
- Any number of customizable pricing schedules can be entered with effective dates.
- Pricing schedules can be customer specific to allow for negotiated contract pricing.
- Invoices are automatically printed or sent electronically to the customer when the order is ready to ship.
- Multiple currencies are supported.
- Blanket orders are supported, with the ability to create any number of scheduled releases. Customers can be allowed to manage their releases securely via the Internet.
- Support provided for toll-processing orders and inter-company transfers.
- Real-time production and shipping status is available for any sales order. Status can be queried securely by customers via the Internet.
- Workflow management tools ensure that each step in the order process is completed successfully, every time.
- Maintains a detailed log of all revisions to a sales order.
- Extensive sales and profitability analysis capabilities provided using advanced Business Intelligence tools.

## Benefits

- A reduction in the number of calls per order providing higher customer inquiry and order capture rates with improved customer satisfaction.
- At the order inquiry, order entry stage STEELMAN calculates the probable margin and provides the opportunity to accept, reject or alter order pricing to ensure the order is profitable or meets your profitability standards, all while the customer is still on the phone.
- Enhanced ability to respond and take orders while the customer is on the phone.
- Reduction in clerical errors.
- Improved forecasting with ability to provide reliable delivery dates at inquiry stage.
- Head count reduction.

## Order Control

- Provides all the functions that are required to create, maintain and monitor the progress of orders. It also includes all the functions that are required for on-line pricing, duty and freight.
- Supports many types of orders, including sales orders, blanket orders, transfer orders, inquiries and offerings.
- Supports multiple currencies. Allows the use of standard or variable exchange rates.
- Allows the user to obtain the price history for a given product or material type via a Discoverer Report.

## On-Line Pricing

- Creates pricing categories and pricing elements within a category.
- Creates and maintains price rates for pricing categories and elements. Price rates may be dependent on various factors.
- Creates price schedules for a product with effective dates. Each price schedule may consist of a base price and unlimited, user-defined add-on prices.
- Allows for the creation of customer specific price schedules.
- Price schedules are used during order and quotation entry to calculate the price of an item automatically. Related cost and margin may be displayed at user's option.

## Sales Commissions

- Provides the capability to set up a table of commission rates for outside sales agents. Sales agents are defined as business partners.

## Sales Order Changes

- A detailed log of all revisions to a sales order is kept.
- A change notice report is printed after the change is confirmed.
- Revises production work orders can be issued after confirmation.

## Work Order Instructions

- Technical and commercial instructions are automatically added to a sales order once an inquiry or sales order change has been confirmed.
- Instructions typically support a company's standard operating practices and may include, for example, packaging, finishing, tagging, bundling, manufacturing practice codes, inspection codes, etc.

- Instructions are printed on the appropriate work orders on the shop floor.
- Any instruction can be manually over-riden.

## Production and Shipping Status

- Production status includes completed, current and scheduled work steps, posted weights per step and scrap weights, projected ship date and projected ship weight.
- A summary of shipments can be displayed for orders with multiple shipments.
- A description and the location of all work in process and finished inventory for a sales order or customer can be displayed.

## Offerings

- Provides the capability to query inventory and select inventory items from the list to be included in the offering as line items.
- Automatically expires an offering if it did not turn into a sales order by the expiration date that is specified on the offering. The expiration date will initially be generated automatically based on a configurable system variable.
- Automatically generates an alert when the offering is about to expire. A system configuration variable is used to identify when the alert is to be issued. The system allows the user to change the expiration date.
- Upon expiry or cancellation of an offering, the system will release any stock that was reserved for the offering.

## Invoicing

- Invoices are printed or sent electronically to the customer when the order is ready to ship.
- Invoices can be printed one at a time, or in batches.
- Invoice amounts are posted directly to the General Ledger.

## E-Commerce

- Customers can enter and manage their own orders using a secure connection to the Internet.
- Customers can access the production status of their own orders and shipments, including the current projected ship date.
- On-line Accounts Receivable allows customers to view the status of their accounts, including detailed invoices.
- Support is available for industry standard EDI (Electronic Data Interchange).

*SEMS V4 product features and specifications subject to change without notice.*

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