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## For Your Information

Sage Software offers informative and free Web seminars. Current offerings include:

- ▶ Preparing Your Business for Future Technologies
- ▶ 5 Keys to Hiring Great Employees

For the current Sage BusinessWorks Webcast schedule or to register

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**Improve Your  
Cash Flow**

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for more info!

## Increase Efficiency With The Order Entry Module

**A**re you still writing out customer orders by hand on three-part forms, sending one copy to the warehouse and another to accounting? And when you're out of stock of an item, does that piece of paper sit around in somebody's in basket waiting for the product to arrive? Do your quotes get typed up in Word, calculator at the ready to factor in discounts and calculate tax? Does determining how much of a particular item you need involve manually tallying up your orders? If you answered yes to any of the above, perhaps it's time to consider how automation can dramatically increase your productivity and profitability.

The Sage BusinessWorks Accounting Order Entry module can automate your ordering and invoicing procedures, while adding convenience and efficiency to minimize overhead and speed order processing times. Your business success relies on your ability to get your products into customers' hands as quickly and efficiently as possible. The Order Entry module used in conjunction with the Accounts Receivable module can deliver huge efficiency gains. Let's take a closer look at the Order Entry module.

### Powerful Features

The Order Entry module has the same look and feel of the Accounts Receivable module, making it easy for users to master the entry of quotes, orders, and invoices. They will be able to create custom quotes for your customers including part numbers, non-stock items, and labor charges, then either print and fax them or e-mail them directly from within the software. When a new customer calls, your staff can enter their information on-the-fly from within the Order Entry module, saving the step of opening up a separate Maintain Customers window.



Automating your order entry process can save time, save money, and improve customer satisfaction.

You can create a template of parts, labor, or comments that normally appear together on an order, quote, or invoice to save the effort of rekeying common configurations.

The Order Entry module allows you to record payments or deposits against an order at the time of entry—a great way to improve your cash flow.

The Order Entry module performs credit limit and on-hold checking and alerts you if your customer has exceeded their credit limit or has been placed on credit hold. If you need

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Compliments of:



# Increase Efficiency With The Order Entry Module CONTINUED

to include a note in the lines section, but you don't want the comments to appear on printed forms, choose *Hidden Comments*. When you are ready to invoice and ship orders, you can either invoice each order individually or select a series of sales orders to invoice.

## Informative Reports

More than a dozen informative reports put crucial information at your fingertips. *Picking Tickets* will assist you in collecting inventory parts prior to shipping, and *Packing Lists* can be included with the shipment to your customers. You can even e-mail a PDF copy of the Packing List to your customer, effectively providing an advance shipping notice.

A *Back Order Fill* report details which parts are now available and which orders contain parts that can now be shipped (either fully or partially) due to receipt of parts into inventory. The *Gross Profit* report allows you to review sales and profit information on an invoice-by-invoice basis, including gross profit and profit margin. You can produce a commission report including only paid invoices and sorting by sales representative. The *Sales Analysis Report* offers similar data, but the data is sorted by inventory part, which allows you to quickly identify sales and profit information on a part-by-part basis.

The *Order Entry Business Graphics* reports give you the option of producing customized full color charts and graphs providing a high-level view of your order entry data. You also can e-mail these reports for efficient distribution of your company's business data.

## Ship-To Addresses

Your customers may request that you ship their order to an address different from their billing address. The Order Entry module enables you to enter and maintain up to 500 separate shipping addresses for each customer. Select the address from a list during order entry or choose to enter a one-time shipping address.

## Partial Shipments

Using the Order Entry module, you can ship part of an order, leaving the remaining items back-ordered on the open order. This feature

allows you to ship parts faster, resulting in happier customers and an increased cash flow as now you can invoice for the parts you are able to ship.

## Kit Functionality Adds Convenience

If you sell two or more items grouped together, you'll find that the *Kits* feature in the Order Entry module is a big time saver. Kits functionality differs from *Subassemblies* in the Inventory Control module in that the on-hand quantity is not maintained for Kits, and each item in the kit appears on quotes, orders, and invoices as a separate line item with a separate quantity. In other words, you do not build Kits like you build Subassemblies. Kits are simply collections of parts, which are typically sold together, often with special pricing. Setting up predefined Kits saves time and helps to ensure accuracy; there's less to enter, so there's less opportunity for error.

## Inventory Integration

The Inventory module is not required to operate the Order Entry module; you may continue to sell the Standard Items maintained in the Accounts Receivable module. However, the Inventory module does add tremendous functionality and should be considered as part of your complete distribution solution.

With integration to the Inventory module, users can inquire into part information with the click of a button when entering Quotes, Orders, and Invoices. The Part Information screen presents pertinent information such as: committed, back-ordered, available, on-hand and on-order quantities, ship weight, substitute parts, and even an image of the part.

Perhaps you've lost a sale when a customer ordered an out-of-stock item. Using the Order Entry module, entry clerks are presented with a list of substitutions for out-of-stock items and can easily select these substitute parts while processing quotes, orders, and invoices. Customers appreciate the extra care this shows, and it means orders get shipped and invoiced today.

A convenient *Part History* button appears once you enter a part number on an Order,

Quote, or Invoice. Press it to display the customer's purchase history for the item. You will see the invoice number, date, quantity, price, discount, and the sales representative. This provides an excellent reference when your customer asks, "How many of these did I buy last time?"

The Order Entry module also offers an interface with the powerful freight manifesting software, StarShip. To learn about StarShip, please read our story on page 3 of this newsletter.

If you've been relying on spreadsheets, notes, and the invoices you enter in the Accounts Receivable module, resolve to improve the service you offer your customers and increase the efficiency involved in getting your products out the door. The Order Entry module is both powerful and easy to use. Please give us a call for further information. ★

## Did You Know?

### Sage Software Online

Did you know that Sage Software Online ([www.sagesoftwareonline.com](http://www.sagesoftwareonline.com)) has several Sage BusinessWorks Accounting tutorials available to you?

These tutorials are designed to walk you through common tasks within the software and are excellent to help bring new employees up to speed, or to refresh your memory before you take on an unfamiliar task.

Available tutorials include:

- ▶ AP Credit and Debit Memos
- ▶ AR Credit and Debit Memos
- ▶ Accounts Receivable Customer Refunds
- ▶ Adding a New User
- ▶ Backup and Restore
- ▶ Install Service Packs
- ▶ Releasing Stranded Users and Tasks
- ▶ Vendor Refunds

Give us a call for more information. ★

# StarShip—A Freight Manifesting Solution

An integrated freight manifesting solution can help you distribute your company's products more efficiently and at the lowest possible cost. StarShip, engineered by V-Technologies, Inc., is one of the most comprehensive freight manifesting systems available today for small to medium-size companies. It is capable of processing shipments through several different carriers, including: UPS, FedEx, USPS, and Airborne Express.

StarShip handles all of the manifesting tasks that your shipping department requires. Not only does it calculate the freight charges and produce bar-coded shipping labels, it can even shop for the lowest rates to your customers' shipping destination. StarShip interfaces with dozens of popular accounting packages—including Sage BusinessWorks Accounting. Let's learn about the many advantages of using an integrated freight manifesting system.

## Complete Shipping Solution

StarShip is a complete shipping solution, supporting multiple carriers in one user interface while storing shipment history in a central location. StarShip offers tight bi-directional integration with Sage BusinessWorks making your shipping process more efficient and error-free.

## Easy To Use

Simply type in the quote, order, or invoice numbers into Sage BusinessWorks and StarShip retrieves the ship-to name and address, P.O. number, weight of the parts, ship via, and more. StarShip can process shipments from the Sage BusinessWorks *Maintain Sales Orders*, *Maintain Quotes*, *Select Orders to Invoice*, or *Direct Invoice* functions. Simply double-click on the Sage BusinessWorks freight field and StarShip opens with the ship-to information populated. StarShip makes your accounting department more efficient by automatically updating freight charges.

This real-time integration will write the actual freight cost back to your order, enabling you to invoice orders immediately after they are shipped. Customer Service gets a boost as you can quote actual freight charges as you take orders or build quotations.

## Always Up To Date

You'll never have to worry about updating Sage BusinessWorks when a carrier's freight charges change. A yearly subscription plan is available that covers you for 12 months of carrier rate/service changes, interface changes, and enhancements. StarShip typically has at least two major releases per year.

## Informative Reports

Several informative reports are included to give you an accurate picture of the day's shipping activity as well as shipping history: Daily Shipment By Customer, Shipment History By Customer, COD Remittance, Insurance Report, History Freight Report, and the Daily Freight Report.

## Multiple Carrier Support

The standard StarShip module processes shipments using UPS, FedEx, and FedEx Ground. Functionality for processing shipments via the U.S. Postal Service, Airborne Express, Spee-Dee Delivery Service, and a user-definable carrier are available as options.

## Carrier-Specific Features

UPS shippers will appreciate that StarShip is UPS Online certified, which means you can electronically upload shipment files and reference data to the UPS Data Center. This enables your customers to track their own packages over the Internet.

FedEx Ground users can electronically upload an end-of-day file to FedEx. Electronic Package Data Information (E-PDI) is used by FedEx Ground to more rapidly and accurately capture shipping information used within the billing process. With a compatible printer, you can print the RPS Code 128 labels and COD tags needed.

FedEx Express shippers can calculate freight charges based on published or custom rates. Companies shipping a high volume of packages can optionally link StarShip directly to the FedEx Ship Manager (FSM) to process shipments.

United States Postal Service (USPS) support is available as an option. Delivery Confirmation barcoded labels have been tested

for accuracy and approved on a national level, ensuring that StarShip is delivery-confirmation certified. StarShip automatically uploads shipment detail to the USPS so delivery confirmation of Priority and Standard Mail (B) shipments can be sent. In addition, StarShip is MAC (Manifest Analysis Certification) certified, ensuring the accuracy of permit labels, and manifest reports and postage statements.

## Save Time And Increase Efficiency

Today's shipping is very information intensive, and there is no better place to access this information than directly from your financial system.

In addition to increasing the efficiency of your warehouse staff, StarShip makes your accounting department more efficient by automatically updating orders with freight charges. This real-time integration allows you to invoice orders immediately after they are shipped and ensures you are accurately charging for freight. StarShip for Sage BusinessWorks provides the most efficient and error-free way to ship your orders.

## StarShip Features And Benefits

- ▶ Seamless interface to Sage BusinessWorks requires minimal user setup.
- ▶ Reads shipping data from Sage BusinessWorks automatically.
- ▶ Writes freight charges back to your quote, sales order, or invoice.
- ▶ Automatically calculates freight charge based on the parts' Inventory or Purchasing weight.
- ▶ Prints carrier-approved shipping labels.
- ▶ Allows rate shopping among carriers.
- ▶ Supports third-party parcel insurance.
- ▶ Optional electronic scale interface eliminates manual entry of parcel weight.
- ▶ Additional handling allows you to add a per-package service fee.
- ▶ History button allows easy access to shipment status and tracking.

Would you like see StarShip in action? Call us for more information or download a working demonstration from [www.vtechnologies.com](http://www.vtechnologies.com). ☆



## In The Spotlight Improve Your Cash Flow

**D**id you know that more businesses fail for lack of cash flow than for want of profit? The root cause is simple — you assume the cost of goods or services in advance of receiving payments from customers. The solution, while not quite as straightforward, is achievable with a little effort. Here are our top suggestions:

### 1. Invoice More Frequently

If you sell products, mail—or better yet, e-mail the invoice the same day the product ships. And if you are a service-based business, bill your clients twice a month or once a week instead of monthly.

### 2. Request Deposits Or Multiple Stage Payments

For large orders or engagements, it is reasonable to request an up-front deposit of up to 50 percent. Cover your costs before fulfilling the order.

### 3. Offer Payment Discounts For Timely Payments

Encourage customers to pay early or on time by offering a discount for prompt payment. Even a small discount can motivate faster payment.

### 4. Check Credit References

Create procedures to check credit before giving terms and make sure they are followed. Get e-mail addresses with credit references.

### 5. Generate Accounts Receivable And Aging Reports

Regularly graph your total accounts receivable and past due amounts over time so you understand your cash flow trends. This can help you identify potential cash shortfalls and allows you to take early action to mitigate them.

### 6. Add Late Payment Charges

Like early payment discounts, late payment charges can motivate your customers to pay promptly. Send account statements at least once a month. Include the late charge information prominently on your invoices and statements.

### 7. Generate Mid-Month Payment Reminders

Generate e-mail reminders based on criteria within your Sage BusinessWorks Accounting database. Use the Custom Office module to help automate the task.

### 8. Accept Credit Card Payments

Your customers may be having cash flow problems—accepting credit card payments gives them relief while allowing you to collect on time.

### 9. Adjust Your Prices

As the cost of doing business increases through rising fuel, labor, and insurance costs, be sure your prices keep pace. Smaller, more frequent increases are easier for customers to accept.

### 10. Charge For Items That You Now Give Away

Do you go out of your way to process rush orders, but fail to charge extra for the service? What about local delivery services? Think about what other services you are currently giving away for which you could charge fees.

### 11. Add Handling Charge To Freight Charge

The cost of labor and packing supplies is significant. Consider adding a handling charge to actual freight to cover these costs.

### 12. Reduce Inventory/Streamline Product Lines

Excess or obsolete inventory adds a heavy burden to your costs. Can excess inventory be returned to the vendor? Could you reduce the number of SKUs by eliminating low volume or similar items?

### 13. Negotiate Discount/Extended Terms

Suppliers who value your business will often be willing to offer special terms, especially for larger orders, giving you time to collect balances from your customers.

### 14. Renegotiate Bank Service Charges

If you do all your banking with one institution, or hold assets such as certificates of deposit with your bank, your bank may be willing to waive checking account and other service fees.

### 15. Consolidate Debt

If you have several loans related to your business, you may be able to consolidate them into a single lower-interest account.

Your Sage BusinessWorks software contains the tools and features to help you implement many of these improvements. Call us to discuss. ☆



AccuPointe

Charlotte, NC

(704) 283-0311

(800) 598-0311 toll free

Web Site:

[www.AccuPointe.com](http://www.AccuPointe.com)

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