



**SALES ORDER** The success of any business relies on keeping customers happy. From initial contact to product delivery, successful customer relations depend on effective and accurate handling of each step of the sales cycle.

Visual Dolphin Sales Order takes better care of the company's most valuable asset, customers. It is the solution for streamlining the sales cycle and significantly enhancing customer service. Immediate access to up-to-date inventory and customer account information empowers the sales team to provide accurate and quick responses.



## General Features

Visual Dolphin Sales Order offers the following advantages:

- Manage your client quotes until it is confirmed into a sales order
- Define special pricing conditions depending on your client's profile
- Issue your clients invoices based on the preset sales terms and conditions
- Generate automatically purchasing needs based on pre-set rules and reordering conditions
- Manage your receivables based on agreed payment schedules
- Define and apply salesmen commissions schemes
- Query your sales trends based on client, date, item, etc.

# CLIENTS CATALOG

In Visual Dolphin, third party accounts (suppliers, customers & salesmen) are created as contacts in the address book. This option eliminates redundant data entry and reduces errors. It simplifies the management of enterprise-wide information by using one central database.

Depending on the business relation with the organization, a contact is identified as a client, a supplier or both at the same time. Information is consolidated at the same level and made available to all the modules, where required.

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## Price List and Discounts

A default price list is defined at the level of the client. It will be used automatically during the invoicing process. An additional price list, or special price list, can also be specified. It will probably contain special pricing for a limited number of items. While invoicing, Visual Dolphin will check first if the item price is defined in the special price list before proposing the default item price.

A discount can be entered as default for a client. It will be proposed on the sales order or an invoice. An additional discount, if specified, can also be taken off after the first discounted amount is computed.

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## Credit Limits and Payment Terms

With Visual Dolphin, identifying adequate credit conditions ensures a prompt and efficient follow-up of the cash collection activity. Visual Dolphin provides a flexible definition of the credit conditions, like the credit limit or payment terms, to accommodate with a diverse customer base. The client credit limit is controlled when preparing a sales order or a direct invoice. Payment terms, when entered, helps reducing bad debts and increasing cash flow.

# Inactive Client

With Visual Dolphin, clients' records are flagged as inactive when regular use is prohibited. This feature helps organizing clients' records effectively by identifying them as inactive and restricting transactions. Clients are not deleted to allow historical reporting.

## SALES

Visual Dolphin provides a comprehensive ordering and invoicing solution that can fit any type or size of business. The usage of extensive automatic features simplifies the ordering process, saves time, eliminates errors and facilitates cost-efficient operations which keep management and customers satisfied.

Moreover, Visual Dolphin helps management in making decisions using the most up-to-date business intelligence solution that puts information needed at the user's fingertips.

## Quotes

Visual Dolphin proposes an integrated order management system that handles the sales process from its early stages. Entering a quote is an element of the solution for streamlining the sales cycle and significantly enhancing customer service.

The elements of a quote define information about the client, the salesman, the preferred warehouse and the list of items required, quantities and prices. Prices and discounts are generated using the flexible multiple pricing scheme supported by Visual Dolphin.

Quotes that are entered in Visual Dolphin are subject to a validation process that moves the initial quote through a cycle of internal validation until it is confirmed by the client. At that time, the initial quote becomes a confirmed sales order. In other words, Visual Dolphin converts automatically confirmed quotes to new sales orders.

Moreover, Visual Dolphin keeps track of the status of an order to generate statistics about quotes that were lost, postponed or confirmed.

## Sales Order Processing

With Visual Dolphin, processing sales orders is easy and efficient. Once a sales order is confirmed, it could be delivered after checking item availability in inventory and client credit information.

Items quantities are specified in any of the unit of measures that were previously defined in Inventory Control. Visual Dolphin proposes an unlimited number of units of measure (UOM) with fractional conversion factors.

Depending on the packaging of the item and the type of the transaction, industry-specific measurement units may be defined for an item. For instance, items may be bought in containers, inventoried in pieces and sold in boxes.

Sales orders, depending on requested item availability, can be delivered partially, in more than one delivery. Sales orders are kept open indefinitely until all items are delivered. Remaining ordered items can be cancelled at any time and the sales order closed.

Item Code	WHS	S-6	KB	RZ Desc	uom	extra Desc	Qty	Free	Price/uom	Disc. %	Total	Reason	R. Qty	R. Free Qty	Details
S-SEC-4-CR	MW			PCS			50.00	0.00	74.000	0.00	3,700.000		20.00	0.00	
S-SEC-6-CR	MW			PCS			60.00	0.00	100.000	0.00	6,000.000		12.00	0.00	
046.540	MW			PCS			10.00	0.00	300.000	0.00	3,000.000		0.00	0.00	
046.541	MW			PCS			20.00	0.00	200.000	0.00	4,000.000		0.00	0.00	

# Web Sales Order

Web Sales Order helps editing and keeping track online of the sales orders. It is completely flexible and easily tailored to suit the needs of the clients. Visual Dolphin Web Sales Order is an innovative module developed to enhance your sales order cycle. Its mission is to help you create, edit and keep track of your customer orders, through your web browser, anywhere you are.

Every step of the sales order process has been designed to give maximum efficiency. The WSO module is completely flexible and adaptable, and can easily be tailored to suit the needs of the individual user. It takes into consideration all the features of the Visual Dolphin back office ie credit limit, overdue balance, available quantity, special price list per customer, special customer discount, salesman catalogue etc.. WSO is completely integrated with all Visual Dolphin modules. This means that all required information is at the fingertips of the user, to generate unhindered productivity.

## Invoicing

Visual Dolphin offers a flexible and quick solution for the processing of high-volume invoices. It provides a rich invoicing environment for updating inventory and customers accounts through the issuance of invoices and returns.

Invoices can be entered directly or generated after being referred to an existing sales order or delivery. A control on the client credit limit is processed while saving the invoice. The user can accept to overwrite the credit limit if he has the appropriate rights.

Default discount for the client is displayed and can be modified by the user, if allowed.

Item Code	Unit	Price	Qty	Total
HP-4520	PC	100.00	1.00	100.00
HP-4520	PC	20.00	2.00	40.00
HP-4520	PC	30.00	3.00	90.00

Date	Amount	Balance
15/01/2009	500.00	500.00
15/01/2009	500.00	1000.00
15/01/2009	474.00	526.00

## Payment Schedule

Visual Dolphin accommodates the need for accurate and timely receivables.

Based on the payment schedule prepared in the sales invoice, Visual Dolphin generates the adequate transactions in the Accounts Receivables to keep track of the clients' payments. Due dates are established as per the agreed credit terms that were previously defined for each client.

## SALESMAN COMMISSIONS

Visual Dolphin offers a very powerful tool to calculate salesmen commissions. Set-up of the commission rates is very flexible, since commissions' rates are defined per family of items, per brand or a combination of a family and a brand.

Commissions' calculation is based on the quantity sold or the net sales with respect to pre-defined brackets of percentages or target amounts. Visual Dolphin even proposes the possibility to attribute a lump sum amount depending on the quantity sold.

The end of month calculation generates the commissions per salesman in a grid-like screen. The computed values can even be reviewed and updated if necessary.

## VAT

In countries where Value Added Taxes apply, Visual Dolphin enables the entry of a VAT rate at the level of each item. The predefined VAT rate is applied at invoice entry time, and facilitates the calculation of the VAT.

## FORECAST

Sales & purchase forecast are essential parts of any business. Based on historical data analysis of market surveys & trends, sales persons' estimates and buyers' budgets, the forecasts can be established. Accurately forecasting the sales & purchases help you unforeseen cash flow problems and manage your financing needs more effectively.

## REPORTS

Visual Dolphin proposes a variety of industry-standard reports to produce critical information on sales orders, expected deliveries and sales statistics.

The usage of a standard reporting tool provides the required flexibility to produce effective reports and enables the users to export all report data to an external file, utilizing most of the standard supported data types, like ASCII, RTF or Microsoft® Excel.

## Sample Sales Reports:

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 Daily Sales Orders

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 Journal of Sales Orders

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 Printing Invoice Slips

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 Daily Sales

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 Journal of Sales

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 Delivery Report

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 Royalty Sales Report





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