

Sage Line 500 - Scheduled Orders

This functionality is part of the Sales Order Entry module.

Records Kept

Schedules

- Scheduled order numbers can be generated automatically or manually entered.
- Schedules can be generated for goods and/or services and can have pre-set comments for when invoices are generated.
- Pre-set customer details, schedule start and end dates, pricing and settlement discount terms in advance on the order header.
- Pre-set choice of order acknowledgement.
- Pre-set status of created orders, for instance define that stock is automatically allocated when the order is created.
- Use your own or the customer's product code.
- Type in prices inclusive or exclusive of VAT.
- Store stock items in one unit, sell in another and despatch in yet another.
- Allow comments to be attached to schedules and/or to individual schedule lines.

Delivery schedules

- Store delivery schedules against each detail line.
- Generate delivery schedules manually or automatically.
- Define multiple daily deliveries that can be time based.
- Schedules can be provisional or confirmed.
- Allows for delivery supersession, for instance an existing monthly delivery can be converted into 4 weekly deliveries.

Tasks Supported

Sales order generation

- Generate all or a range of sales orders from schedules that are due.
- Automatically generate comment containing delivery time, for time-base delivery schedules.
- Automatically record ongoing schedule status information such as last despatch, total order value, total invoice value.
- Maintain an audit trail of orders generated.
- Allows for "trial" generation to evaluate orders that will be generated.
- Optionally use the same numbering sequence as normal Sales Orders, or a special numbering sequence defined by values on Scheduled Order header.

Schedule and order acknowledgements

- Flag schedules to print scheduled acknowledgements.
- Produce acknowledgements at point of order generation or at a later date.
- Print scheduled order acknowledgements for ranges of customers, schedules, territories, industrial classes, regions and schedule dates.
- Print acknowledgements for specific order detail line status.

- Choose the amount of detail to be printed on acknowledgements

Reporting

- On-line enquiries include:
- View schedules in both summary and detail.
- List summarised schedules by customer number or alpha code.
- Enquire on the total required quantities for a selected product or schedule.
- Standard Reports provided include:
- Summary of schedules for ranges of customers orders.
- Schedule detail information.
- Audit report of generated sales orders.
- Invoice schedule details.
- MRP schedule forecasts.

Housekeeping

- Clear down completed schedules and, optionally, completed schedule lines.

Integration with other modules

MRP

- Generate MRP forecasts for provisional or confirmed schedules.

Sales Order Processing

- Update schedules with invoice details for associated orders.

Features for International Use

- Record foreign currency values on schedules for foreign customers.

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