AccountMate

AccountMate 13 for SQL or Express
Sales Order Configurator Module

Complex Orders and Quotes Are Simplified

Sales Configurator is a program that allows companies to develop and enforce ordering rules for the products they sell. It confirms that all quotes and orders entered into AccountMate include only products that the company can deliver. For example, if a company sells multiple lines of garage doors, but one line is only available in black and white, every order for that door can only be entered in a black or white color choice. This is true for every element of the garage door, from door size to available window options.

Orders Can Be Entered with Less Training

By enforcing configuration rules, the person entering an order requires substantially less experience and training to enter valid orders. When pricing is affected by the options selected (i.e., stained glass) the Sales Configurator will automatically increase or decrease the price accordingly.

Creating Complex Orders Just Requires Selecting from Available Options

Time Savings, Greater Order Accuracy, and Increased Customer Satisfaction

The result is that orders are entered correctly the first time and every time. Order entry time will be reduced. Pricing for quotations and orders is completely accurate and the product can be assembled as ordered. Customer satisfaction will improve and wasted expenses from improperly specified orders will be eliminated. This can also lead to a greater percentage of on-time shipments.

An Example of the Module in Use

For example, when an order is placed for a garage door the customer service representative will ask a series of questions that appear on screen to specify the options available for the door. Only valid options are highlighted. If a customer requests an option that adds to the price, the total price is changed accordingly. The order can only be completed when all the available options are chosen.

Integration with the Sales Order and Manufacturing Configurator Modules

• Integration with the Sales Order module facilitates reduction of sales order entry time and errors and increase in product margins through accurate pricing.

• When integrated with the Manufacturing Configurator module, users can copy sales order configurations onto work orders.

These options can be items (i.e., specific color), sizes selected from a list, or sizes typed within an acceptable range (i.e., between 18" and 28").

If both Sales Configurator and Manufacturing Configurator are installed, configurations generated in Sales orders can be passed to manufacturing to become work orders without rekeying any redundant information and will save more time.

Other Features

• Unlimited number of options can be set up per configuration.

• Set up an unlimited number of user-defined formulas, user-defined rules, item definitions, etc.

• Ability to add images to the configurator "list" option choices helps users avoid confusion and helps ascertain that the correct product is being sold.

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