

Improving productivity and cost control with easy entry and accurate order processing

Typical Applications

TREQSO Sales Order / Job Order Module provides you with a feature rich system for preparing quotes and orders. Effectively tracking orders, job costs, and profitability, the software is specifically designed for the job shop environment that includes:

- Customization
- Maintenance
- Repair
- Manufacturing

Functions

- Quotations
- Streamlined Order Entry
- Automatic Pricing & Costing
- Inventory Commitment / Backorder Processing
- Order Processing
- Reporting

Benefits

TREQSO Sales Order / Job Order Module provides the ability to turn accepted quotes into orders. Accepts quotes from TREQSO quoting module.

View gross profit amounts and percentages during order processing. Individual item pricing can be adjusted or fine-tuned for flexible pricing options.

The ability to reserve or “commit” inventory promised to customers also improves customer service. Backorder processing features linked to the purchasing module help process and monitor backordered items.

Your sales staff can immediately inquire into item availability as well as the customer’s previous buying history and credit status. Access to information prior to a sale helps you make smart selling decisions.

Entry of textual information on orders such as bid specifications or shop instructions allows information to flow between functional departments of the company, reducing communication errors. Disclaimers, warranty and other information for the customer can also be setup one time and included in your custom order form.

Actual costs and profitability can be analyzed while the order is still in progress. Accurate, up to the minute job status is automatically maintained and viewable. Estimated versus actual costs can be summarized and variances reviewed by part, part category, job, job phase or order type.

Features

STREAMLINED ORDER ENTRY

Order entry screens can be tailored by each user to omit unnecessary questions, speeding data input.

Inquire or lookup customers and items by partial entry of the name, description or order ID. This eliminates reams of customer and parts lists.

Reduce collection problems by optionally requiring a PO for certain customers and by automatic customer credit checking.

Record cash or credit card payments during order entry.

AUTOMATIC PRICING & COSTING

A pricing matrix allows for automatic pricing options by customer and product criteria and almost unlimited flexibility in pricing by item, product line, vendor, customer and quantity purchased.

Orders are accurately costed according to your costing method (LIFO, FIFO, AVERAGE) as inventory is reduced.

Flexible sales tax computation by destination (i.e. ship-to address) or origin (your branch location address). Sales taxes can be defined by state/province or by postal code.

ORDER PROCESSING

TREQSO quotes are quickly converted to job orders upon customer acceptance.

Schedule your jobs using date required and estimated completion date.

Interfaces to TREQSO Labor Module to accept actual labor hours on time & materials jobs.

Reduce inventory daily or periodically as needed.

INVENTORY COMMITMENT / BACKORDER PROCESSING

Inventory can be automatically committed to sales orders as they are entered, preventing inventory promised to one customer from being sold to another.

Backordered items can be "attached" to purchase orders to track out of stock items.

Receiving a PO for a backordered item automatically triggers the completion of an order, eliminating additional delay.

REPORTING

A flexible report writer allows a virtually unlimited number of reports for daily sales, open orders, commissions, sales tax or margin analysis.

Standard reports include a Job Order Status Report showing each job's percentage of completion or a Completed Job Analysis showing gross margin percentages and variances from estimates.

Labor analysis available in summary or detail.

Print orders or invoices in detail, summary, textual or combination format.

Maintain and report on order history for unlimited history years.

Interfaces

- Inventory
- Kit Processing / Bill of Materials
- Purchase Order
- Accounts Receivable
- Accounting (General Ledger)