

# L A K E

## Sales Order Management Infor SunSystems

The Infor logo, consisting of the word "infor" in white lowercase letters on a red square background.

### Take complete control of sales order management

Infor SunSystems provides full sales order management through its Sales Management module, which delivers functionality for sales invoicing, sales order processing, including picking and despatch processes if needed, as well as sales quotations. In addition, SunSystems allows organisations to create product packages or bundles to deliver profiling specifically for customers, along with advanced pricing.

The solution ensures that organisations can streamline sales, order, and distribution operations, and deliver high levels of customer service.

The SunSystems Sales Management module is fully integrated with SunSystems Financial Management and includes flexible sales cycles, numerous user-defined analysis codes, and extensive user-defined value calculations.

#### Sales order entry

- Review order details with full revision history using order amendment
- Convert quotes into orders using the quotation system, update inventory balances with sales orders and create online inventory inquiries
- Take advantage of an unlimited number of definable sales order types
- Create standard, scheduled, blanket/contract, and back-to-back orders; create scheduled invoice payments based on payment rules
- Perform credit checking and credit warnings, and set overdue limits
- Set up credit approval and tolerance checking
- Make credit approvals based on security

#### Sales order processing

- Sequence or eliminate sales stages to match business needs
- Create user-defined views and extensive drill-paths to associated information
- Facilitate easy access to sales procedures for printing or converting quotations, or printing acknowledgements and invoices
- Avoid arbitrage differences between currencies that can occur from successive conversions via a flexible conversion process
- Hold invoices in their actual value according to the time they were created at a user-defined rate in up to three currencies

# LAKE

## Customer management

- Utilise a flexible system for maintaining extensive customer details
- Store multiple addresses per customer - each with definable characteristics, such as minimum sales order value or default despatch warehouse

## Advanced pricing

Leverage the power of the SunSystems price book when prices are driven by a number of factors, such as campaign, salesperson, customer group, timeframe, region, or discount level.

## Pricing management

- Take advantage of sophisticated and flexible pricing capabilities for structured price bands
- Create a price book hierarchy of up to ten levels for complex requirements
- Set selling prices that can be maintained and changed by authorised users

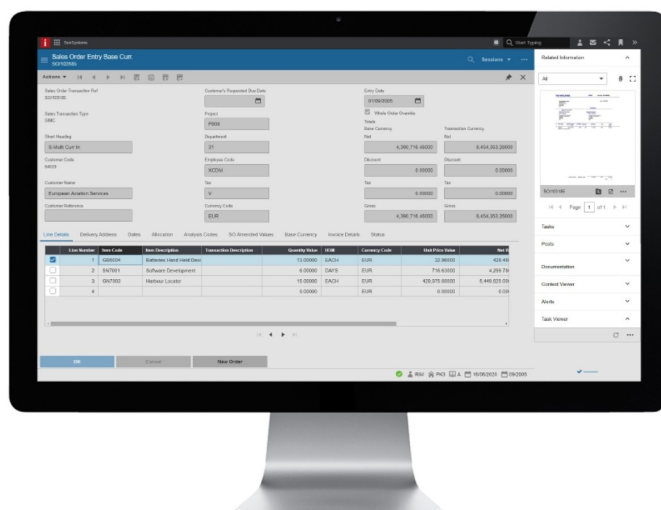
## Call-off statements for blanket orders

## Credit management

- Take action on orders that are on credit hold
- Report patterns of credit usage with automated credit-limit warnings at order-entry
- Review payment monitoring to highlight changes in patterns

## Reporting on sales

- Create standard reports on customer listings, order statuses, and sales performance
- Base sales analysis on item, location, address, and user-defined analysis codes
- Build user-defined reports on quotations, orders, credit notes, and invoices
- Set up margin analysis based on costs captured at order entry
- Perform quotation analysis, such as quotes converted to orders or cancellation reasons



- Produce performance reports for deliveries, quantities, and pricing
- Meet local UK and international requirements for tax reporting and e-filing with the optional [MTD for SunSystems](#) module
- Generate simple and rapid reporting in any combination of currencies

## Integration

- Create custom workflows and alerts via Infor OS
- Export sales orders to or from other systems using XML
- Export sales transactions into Excel to facilitate offline analysis and review
- Map order and invoice details to the ledger with integrated processing
- Leverage integrated mobile functionality

## Complete business processes control

With SunSystems, you can configure and control the complete business process for receiving and processing customer sales orders - regardless of receipt method - from order creation, through invoice generation to final revenue recognition in the Profit and Loss Account.

**LAKE FINANCIAL SYSTEMS**  
+44 (0)113 273 7788  
info@lake.co.uk  
www.lake.co.uk