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Keep your sales team one step ahead

At SI we recognise that one of the biggest issues food manufacturers have is spotting when customer orders are changing slightly. With common sale practices to entice new customers with offers or trials of product lines, you need to be able to spot order and delivery trends quickly, to address any potential loss of customers.

Keep your sales team one step ahead

With so many customer groups, orders, trends and seasons to deal with, understanding who is buying what, when and how fast they need their products is critical. You need data insights that will keep your sales team one step ahead of the competition and your production team informed.

SI's SOP module has been designed to provide all the buying insights you need as well as the functionality you expect from a leading sales order processing system.

Its dynamic menu-driven system adapts to whatever task the user is performing, displaying only those options applicable to the items that are being manipulated.

If you have 2,500 customers our system will show you who's spending the most, who's stopped spending, where spending has dropped off for a particular product line. This analysis could be the early indicator that a competitor has encouraged your customer to trial one of their lines.

Make every customer a priority with reporting and analysis from SI

With business insights delivered by one system from SI, you can:

- know your customers' buying behaviours, spend, order cycle and product preferences;
- detect changes in purchasing habits, for products or core lines, that could be the early indicators for a new supplier being trialled;
- understand what products are trending;
- Fast-track customer shopping baskets, by managing complex orders and quantities with ease;
- build customer loyalty and improve daily operations to deliver great service, every time;
- spot opportunities to sell new product ranges to existing customers.

By default, and according to the rules you have set up, you will only get a view of products that are set up by customer rather than everything available. Using product overrides, set up order comments and unique descriptions, to provide specific instruction details, such as packaging requirements.

Other options include product overrides, to set up order comments and unique descriptions, and provide specific instruction details, such as packaging requirements. There is also the option to bar products if it is known that some customers will not take certain products. And when your food service customers regularly change their orders, for seasonal menus or key events (such as Christmas), products such as turkeys can be removed from templates.

Order management

Our logical **customer template driven orders** are designed to manage those products most frequently ordered; with its drag and drop customer shopping baskets, simply select quantities and then complete the order. Whether you receive orders by

EDI or telesales, as each order is generated it will include delivery details, stock lines, comments and date offsets. And any existing template orders can be set to automatically update whenever they are altered.

Once the order is saved, it also highlights any problems. For instance, it can alert the user if a future order is already in place that could be used to amend and add the new orders.

With SOP, you can customise permissions according to roles or individual applications. Show, hide or lock off as read-only any information based on user permissions. And if your operation is multi-site one, use the dropdown menu feature to select the permissible site to view.

The **si** effect

- Analyse customers' spend**
Know when customer spend has reduced or dropped off against a product line.
- Improve your service and increase customer loyalty**
Create customer sales forecast based on historic information, purchasing cycle and trending data.
- Sales Order Processing (SOP)**
Manages entire process, no matter how high your daily order volumes.

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Invoicing and reporting

SOP calculates the total value of invoice based on stock pricing, relevant taxes and any miscellaneous charges created on the order. Editable invoices also include the option to include credit and debit notes, and can also be configured for multi-currency.

Our SOP module also includes full sales analysis tools, together with real-time and on demand reporting (generated by customer, sales history, product, or product group) and can quickly identify reduced spending levels or patterns of behaviour that could indicate any customers at risk. And with live reporting, prevent over-selling on sales v on-hand stock or accepted purchase orders.

Free text notes

SOP provides multiple areas for free text notes stored against customers, products for use by sales. By selecting the appropriate check boxes, chose whether show notes on the order, the despatch note and/or the invoice itself. For products, notes can be shown on one off or as standard information. For your sales team, notes are ideal for call scheduling and account status details. Notes are controlled by user permissions and options can be turned off through the application.

Price list maintenance and rebates

SOP allows for comprehensive pricing to be applied, including by stock code, standard and promotional pricing and by each customer.

Against each customer record, set up multiple price lists, variances, review dates and templates to expedite sales order processing. Then, through permission based rules, set up restrictions for the users who can override or change any prices. SOP will automatically maintain a full audit of when changes have been made and by which user. Even when multiple lists are in place, SOP will always automatically pick the valid price.

In addition to maintaining price list details in MS Excel and importing any changes, within SOP global price changes can be applied by product (for instance +/-%). Global changes are achieved by setting up price list name, effective from/to dates (dates can be broken down by product) and assigning price list by customer/s or group.

You can also select the customers that will be offered any promotion pricing and allocate the specific stock for these discounts. Once these promotional products are sold, instructions will direct the picker to select only from the allocated batch.

Within the reconciliation section of price list, rebates or mark ups can be applied for products by setting up rules, that are assigned by either customer, groups of customers or by buying groups. Rebates and accumulations can be managed by either customer turnover or rebate.

Despatch management

To manage your deliveries, you can set up default transport routes, your non-delivery days and even assign the driver. When default routes aren't available, SOP also has "allowed routes". If delivery priorities change, routes can be edited to allow for re-prioritisation of customer order drop off.

All customer despatch details can be set up within the customer maintenance record. Select preferences for delivery default days or a specific delivery date against the order (Any non-delivery dates will automatically be shown but these can be overridden). SOP will automatically flag up a warning if, due to the time when the order is put on to the system, delivery cannot be accomplished in the allotted time (for instance, same day). For your food service customers, non-delivery days can be selected and minimum order value applied to their records, any flags up when delivery charges will be applicable.

When combined with our **Proof of Delivery (POD)** application, deliveries can be electronically signed for by customers and details sent in real-time to accounts for invoicing. If any items are rejected and returned by customers, products can be booked back into stock and automatically recorded.

Empower your food production business to manage sales orders more effectively with SOP's feature-rich software and run a system that:

- features **CRM** to track and schedule events, customer calls and timings of orders together with customer notes and statuses for sales team. It also maintains an "Outlook" type calendar view;
- with user permissions by application, select which options your users can view;
- manages **customer hierarchies**, including group, master and delivery points;
- displays **static product notes** and information;
- data entry can be driven by keyboards, hot keys or by mouse control;
- **tools taskbar**, based on permissions, provides access tools to view;
- **"fuzzy search"** ability to filter lists as details are typed (including by customer or product name, contact details, telephone numbers);
- manages and stores details of trade agreements;
- SOP's flexibility also provides for **integration with customer portals and third-party software packages**, including as Microsoft AX Sage 200.



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