

SALES

Microsoft® Small Business Financials

Improve efficiency and increase customer satisfaction with Microsoft® Small Business Financials. Streamlined sales processes enable employees to process and fulfill orders smoothly, while robust integration and reporting capabilities turn sales information and customer data into a powerful business tool.

Streamlined sales processes help you serve customers more effectively and ensure efficiency and accuracy.

Handle shortages effectively by canceling or backordering item quantities.

Quickly create a customer invoice from your sales order information without additional data entry.

The screenshot displays the Microsoft Small Business Financials interface. The main window is titled 'Orders' and shows an 'SOP Blank Order Form' for 'Wide World Importers (Sample)'. The form includes fields for Order No. (ORD00021), Date (12/15/2004), Customer ID (CDHOSPOR0001), and Customer Name (Coho Sports). It also shows the address for both the Bill To and Ship To locations: 2345 Center Ave., Arlington, IL, 12345. A table below the form lists items ordered, including 'Authentic Major League Baseball Bat' with a quantity of 40 and a unit price of \$275.00. The interface includes a menu bar, a toolbar, and a sidebar with navigation options like 'SmartList', 'Customer List', and 'Vendor List'.

Purchase Order No.	Customer ID	Salesperson ID	Shipping Method	Payment Terms	Req Ship Date
	CDHOSPOR0001		MAIL	2% 10NET 30	12/15/2004

Ordered	Shipped	B/O	Item Number	Description	Discount	Unit Price	Ext. Price
40	0	0	51520	Authentic Major League Baseball Bat	\$0.00	\$275.00	\$11,000.00
20	0	0	51600	Hockey Stick	\$0.00	\$23.99	\$479.80
20	0	0	51450	Hockey Stick	\$0.00	\$30.00	\$600.00

Provide customers with accurate order details on the order, including quantities ordered, shipped, and backordered.

Send printed or e-mail invoices, which can be personalized to reflect your business identity.

Seamlessly manage sales processes

With flexible sales functionality that includes integrated quotes, orders, back orders, drop shipments, invoices, item receipts, and payments, employees can manage the sales process efficiently and consistently, saving time and reducing the need for data re-entry.

Serve customers more effectively

Enhance customer relationships and reward top customers with multiple pricing levels, trade discounts, and line item markdowns. Fulfill orders promptly using drop ship sales orders, and improve accuracy with packing slips, picking tickets, and the ability to print historical sales documents.

Know your customer

Maintain a complete, customized view of customer data, including credit limits and transaction history. Easily track histories to identify top customers.

Increase sales

Extend sales and marketing efforts by generating personalized letters and campaigns in Microsoft® Office Word and reaching new and existing customers through Microsoft Online Small Business Services, such as Microsoft Commerce Manager.

Access and analyze sales data

View and analyze the exact information you need to manage cash flow, sales, payments, customer activity, and sales commissions, using comprehensive reporting and inquiry tools and robust integration with Microsoft Office Excel®.



Microsoft Small Business Financials can be acquired affordably and maintained as a long-term investment, with software updates, new releases, and full investment credit toward your upgrade to a higher-end Microsoft Dynamics™ application.

www.microsoft.com/dynamics

SETUP**Customer setup**

Input and track customer information at any time, including multiple and unlimited addresses, payment terms, finance charge, credit card, and complete history information.

Customer maintenance

Easily look up existing customer information. View and change information for one transaction, or save changes to update automatically throughout the accounting system.

Credit limits

Define individual customer credit limits and receive alerts when limits are close to being exceeded.

Transaction import

Easily import customer records, beginning balances and transactions into Microsoft Small Business Financials.

DAILY**Streamlined processing**

Easily transfer quotes to invoices, as well as accept deposits.

Customer-specific pricing and trade discounts

Apply multiple pricing levels to sales items and assign a level to a specific customer. Check credit limits, and set up trade discounts for preferred customers.

Line item markdowns

Reduce prices for specific customers on a line item as a set amount or percentage of the price.

Backorders

Create sales orders without having specific line items in stock, with options to backorder or cancel orders. The backorder quantity is tracked and filled when inventory is replenished.

Drop ship orders

Fill orders quickly by shipping directly from your vendor to a customer without receiving or selling from inventory.

Apply payments

Apply receipt of payment via cash, check, or credit card to a specific invoice or to the overall customer balance. Assess NSF and finance charges according to your business rules.

Packing slips and picking tickets

Print packing slips to accompany each order and invoice, as well as picking tickets for orders, invoices, and returns. Print or e-mail slips and tickets individually or as a group.

Partial invoicing

Transfer partial kit quantities to an invoice while tracking component backorders and fulfillment.

PERIODIC**Customized statements**

Tailor statements using a step-by-step wizard, which allows you to preview and verify information before printing.

Letter Writing Assistant

Integration with Office Word lets you quickly generate collection, thank-you, and survey letters or create your own letter templates.

Reminders and alerts

Automated reminders prompt you before customer payments are due or when they are overdue, while alerts prompt you about bills to pay or overdue invoices.

REPORTING**Flexible reporting options**

View unposted, posted and historical transactions, plus complete customer data, period sales, and yearly sales information in reports such as Customer Balance, Customer Contact List, NSF Customers, and This Month's Sales. Easily print historical sales documents.

Sales tax reporting

Track state, local, and other sales taxes for full sales tax reporting.

Sales commissions

View commissioned sales and generate up-to-date commission reports using Office Excel.

Export to Office Excel

Export reports and SmartList query results to Office Excel for advanced sales analyses and create graphical reports using pie graphs, charts, and other visual tools.