Sales ERP: Should be Features

In the backdrop of online/quick customer responses, changing laws and accounting requirements, it became essential for each enterprise to look for automation and simplification of processes. Enterprises are now require to adopt comprehensive ERP solutions for its Sales function, to overcome traditional way of working in a way to match with current requirements of quick solutions to the customers. Thus it became critical to select the ERP which have all inbuilt functions and features.

Customer Order Management: Required features-

1. Order capturing
   a. Facility with on field sales team to punch orders using handheld devices/Computers.
   b. Unique code for all sales agent which may be their employee id.
   c. Ability to capture all the necessary order details such as customer name, address, Product subscribed, agent name and city, multiple payment modes, reference numbers against such multiple payment modes, etc.
   d. Unique order ID to be generated against each order.
   e. Automatic system driven checks, such as to ensure that no duplicate payment reference numbers are used
   f. System to check using parameters that duplicate orders are not punched.

2. Data flow
   a. Common database access to all stakeholders – finance, sales, logistics and customer support.
   b. Data should be visible to users based on their role, department, designation and hierarchy.
   c. Real-time updation of data upon actions by any single stakeholder.
   d. Cases pending at individual levels, should be tracked.
   e. Cases marked for modification should flow back to the concern level with a notification to the concerned manager/HOD.

3. Data processing
   a. Reference numbers to appear at the correct places on the finance screen to help checking of the payments.
   b. Facility to put comments against cases where further information is required or which are incorrectly punched. Sale person should be able to view these comments and make necessary changes.
   c. Cases modified after original punching to be highlighted separately and audit trail to be maintained.
   d. Should be provision to approve in bulk, if required.
   e. Cases approved from all level should automatically reflect on dispatch team's panel.
   f. An alert to be generated by the system to highlight the pending cases over TAT at each level.

4. Inventory Dispatch
   a. Facility to download the report for cases pending for dispatch at any point of time.
   b. Invoice to be generated, in sync with Finance ERP, as soon as dispatch team marks any case as processed.
   c. Inventory should be auto linked and accounted on each dispatch.
   d. Dispatch details such as tracking number or to be captured by the system and the same and should be visible to all stakeholders.

e. The system should capture inventory movement in a particular period and should be able to generate reports for the same.

f. Return Goods, inventory should be marked by concerned team as usable or non-usable.

g. In case damages are reported in the hardware, amount recoverable from customer to be punched into the system and intimated to all stakeholders.

5. Cancellation and Returns
   a. Facility with customer support team to flag the cases for cancellation which will then be pushed by the system for approval and refunds, if any.
   b. System to generate credit notes as soon as a case is cancelled whose invoice has already been generated.
   c. System to mark the status of orders as cancelled/refunded once cases are cancelled/refunded.
   d. Customer support team to take acknowledgement from the customer and close the case.

6. Reporting
   a. System to have an ability to sort, filter and segregate data with all possible permutation combinations. This will require the panels visible to all the stakeholders to have multiple filters and sorting options.
   b. System to have a dynamic reposting system which can generate multiple reports based on various customised parameters.

   Routine reports will include order booking report, invoicing report, cancellation report and credit notes report.

7. Should be flexible to handle future changes due to change or new processes.