# AppFinity "On-the-Go" Order Entry System

AppFinity's "On-the-Go" Order Entry System is a smart client Windows Mobile based application, it offers a data-collection functionality perfect for salespersons on-the-go to create orders and apply payments to outstanding invoices while talking to their customers onsite. It's fully-utilizable even without Internet. Designed with easy configuration, your salespersons can easily keep the records updated in three easy steps:

1. Download the information from SAP Business One database onto the PDA device via WiFi or as Internet becomes available.
2. While at the customers' premises, create or update sales orders, process invoice payments, perform inventory checks, among others. You do not need to have Internet in order to run these functions; the orders and payments data will be temporarily stored in the PDA device.
3. Upload orders and payments from the PDA device onto SAP Business One database when Internet becomes available.
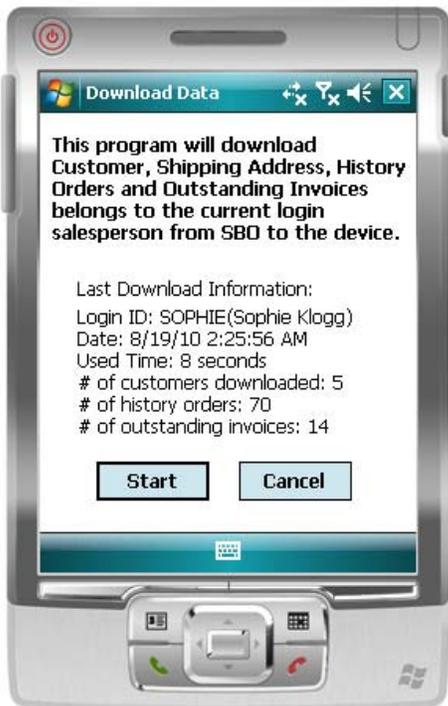
This system is designed to provide your salespersons essential information as they carry out their regular sales calls. Its simplified interface allows your sales team to instantly download inventory status and customer information such as history orders, shipping addresses and outstanding invoices from SAP onto the PDA in no time.

Keeping this information handy enables them to respond to customer inquiries and complete the entry of sales transactions in as few steps as possible. As opposed to a manually-driven system, AppFinity's **"On-the-Go" Order Entry System** drastically reduces the customers waiting time thereby improving customer relationships. Apart from increased productivity, your sales team can focus on addressing other areas of the business.

Key Benefits

- Enables salespeople to create or amend sales orders, process payment transactions, perform inventory checks via a PDA handheld device.

- Fully-utilizable even without Internet connectivity.

- Replaces duplicated manual efforts with automated processes, thereby increasing sales, while maintaining or reducing costs.

- One-step synchronization with SAP Business One database at any time or when Internet becomes available.

www.appfinity.com

Key Features

Place Orders In Few Clicks

Use the "Enter Order" function to create an order for the selected customer. The system displays a list of items with their sales prices under different tabs: Favorite and Other Items. Items in the "Favorite" tab are items that were previously ordered by the customer. The "Other Items" tab shows a list of all items available for sale and maintained in the SAP Business One database. To add an item, simply update the "Qty" column. The sales rep can simply also update the unit price when necessary. The "Calculate" button gives you a running total of the sales order and the number of items as they are added. Once the sales rep or customer has completed the order, use the "Save Order" button to save the order.

Process Customer Payments

Outstanding invoices are available for each customer by clicking the "Enter Payment" function. While at customer's site, your salesperson can process payments and quickly update customer's account balances. This process lessens disputes and possible reconciliation issues typically caused by incorrect payment applications. As the salesperson posts the payment, the customer can verify the transaction and know his updated balance. The "Enter Payment" function accommodates Check and Cash payments. For check payments, enter the check number in the "Chk #" column. For every payment transaction uploaded, SAP Business One creates an Incoming Payment – Draft.
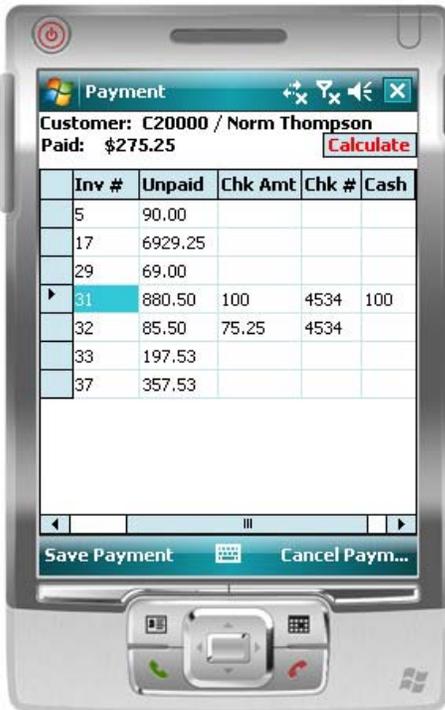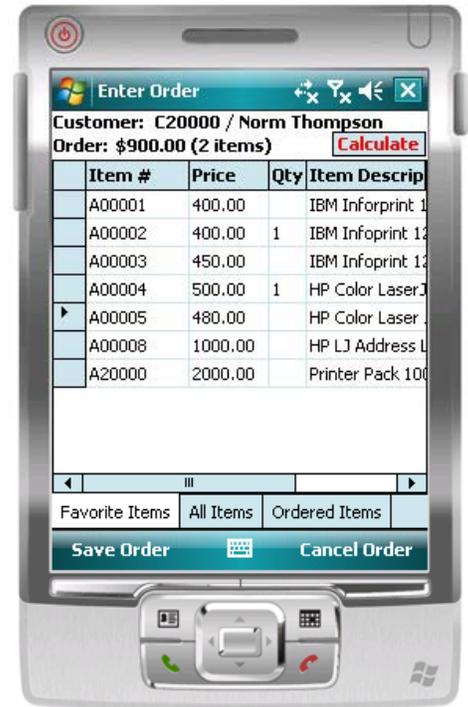
View Balance Summary

As orders and payments are created in the PDA system, the values under the "Enter Order" and "Enter Payment" functions are kept updated. These values indicate the transactions that are yet to be uploaded and synchronized with the SAP Business One database.

View Transaction History

Click on the "Details" function to see the details of the most recent order of the customer. The "View History" function gives the salesperson a detailed listing of the orders placed by the customer. The list shows the sales order numbers and dates, item codes, quantities, and sales prices. You can create a new order in a snap by placing tick marks under the "Ord" column and then clicking the "Enter Order" button.

View Mobile Orders And Payments

To keep track of transactions, the salesperson can click the "View Mobile Orders and Payments" function. This generates a list of all orders and payments regardless of their status as to whether uploaded or not. It can be filtered by transaction dates. This can serve as the salesperson's daily summary report.
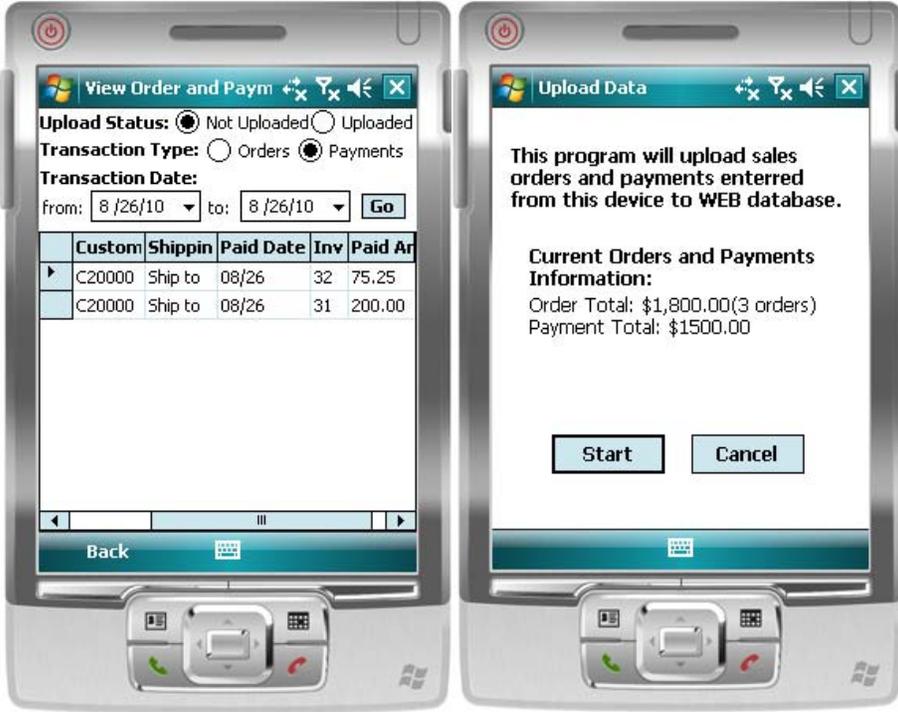
Synchronize In No Time

Your salesperson can download information belonging to him such as customer, shipping addresses, history orders and outstanding invoices from SAP Business One database onto the PDA handheld device. Sales orders and payments entered onto the PDA device can be uploaded and synchronized with SAP Business One at any item or as Internet becomes available.

The accounting staff can review all the uploaded orders and payments thru the Web System Administrator program. The report can list transactions for all salespersons or selected salesperson and can be filtered by date when transactions were uploaded onto the system.

Visit our website at www.appfinity.com to get more information about the AppFinity "On-the-Go" Order Entry System.