Softland ERP
Commercial Area//

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Mobile Sales Module

Softland ERP's Mobile Sales module makes the work of the delivery people or company vendors more flexible and efficient by enabling them to conduct the work of presales and generate orders from mobile devices integrated with Softland ERP; which are Windows Mobile, known as Personal Digital Assistant (PDA), smartphones and tablets with Android operating system.

Features:

- The application consists of two components: one is mobile (for pre-sales, billing and collection) and a desktop one (for administrating routes).
- Integration with Inventory, Invoicing, Accounts Receivable, General Accounting and Banking.
- Allows the use of bar code scanning to enter items.
- Supports multi-company delivery people serving several companies.
- Mobile base, wireless, telephony or web publishing synchronization.
- Allows consignment sales.
- Optional dual-currency handling (local and dollars).
- Allows discounts and bonuses management for price levels or exceptions per customer.
- Allows the identification of devices with a GPS; the geolocation from where information is taken.
- Updated application version from the device without the need to reach the offices.

Mobile Sales (FRm)

With this module, you will be able to:

- Relate general characteristics of the truck to the route prior to the start of the working day.

- Synchronize the mobile device with the routes administrator allowing the loading, shipping and erasing of data.
- Check the customers to visit according to a pre-configured route.
- Perform the following processes during the sessions with a client:
  a) Process physical inventories. Allows checking the details of a customer's inventory, adding and modifying items, as well as their corresponding search and query.
  b) Collections. Offers a series of options for managing collections, for example:
     o Record collections by the total balance of a customer or by selecting specific invoices, enabling two forms of payment: cash (records the amount and currency) and checks (records the information regarding bank name, check number, amount and currency).
     o See credit notes that can be used in the payment of bills. Supports the selection of one or multiple receivable invoices indicating the amount to be paid and the available amount in credit notes.

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o   Print a receipt once the payment has been made. This document includes a receipt number, date of payment, payment total, payment breakdown, documents involved, amount of movement and outstanding balance.

o   Order-taking and/or billing. Allows the creation of orders indicating the price list, payment type to be used and relevant comments, as well as ordering and delivery dates, editing of discount percentages and bonus amounts, if permissions are granted.

o   Guarantee deposits. This concept applies when the client does not have returnable containers and packaging must be paid; such money enters the accounts payable module as a liability. If the customer returns the container, their money is reimbursed.

o   Closing day. Sets the start and close of a working day for the registration of documents during that time, thus making it easier to control documents registration after the closure.

o   Vary the price list used and the type of payment originally allocated to the order, recalculating the amounts, in addition to validating the credit limit of the customer in an order.

o   Once the application has been generated, it allows printing a document with details.

o   Returns of merchandise with or without an associated document in accordance with the policies of the company.

o   Void or print documents.

o   Create queries that have relevant information for the person in charge of sales and collection, such as customers queries, inventory, invoices, generated orders, invoices, returns and general queries of articles.

o   Generate a series of reports, such as visits by amount sold and charged, closure of collections, visits carried out, inventory stocks in the truck, rebates, working day closure and inventory settlement (packaging control).

Desktop Mobile Sales (FRd)
With this module, you will be able to:

•   Configure the necessary factors for the implementation of sales and collection routes, such as PDA (mobile devices), agents (sellers and collectors), customers to visit, items, groups of items (integrated by sets of items available for sale in each route), routes, reasons of visits' effectiveness, warehouses for returns and groups of telephones.

•   Use the packaging control for those companies that sell a product in returnable packaging or containers.

•   Generate a load process for items, customers and agents to avoid reentering information that is already a part of other applications of Softland ERP. There is also a process of the allocation of routes to record, edit, and delete the necessary information to specify a route: a group of items to sell, an agent that will create the route, PDA to be used and customers to visit.

•   Synchronize the transmission of information captured by the driver/collector to the corresponding modules with Softland ERP.

•   Monitor documents through a screen that can show the routes and documents generated by each driver from the main offices; which can be used to establish controls to generate your information.

•   Cash closing. When the driver returns to the main office, the cashier receives the documentation and the money in cash; which must be reconciled with the documents posted on the mobile device.

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