



2020 Insight

Sales Order Management

Effective sales order management is critical to remaining competitive when customers prefer customized products over standard offerings, look for lower costs and expect short lead times. 2020 Insight provides flexible product configuration, detailed order management and real-time order tracking, ultimately resulting in an improved customer experience.

Our 2020 Insight Sales Order Management functionality provides a complete order entry, management and tracking solution. It improves your order entry process by allowing you to import design files directly from point-of-sale systems and specify custom products on the sales order. It improves your

customer care by allowing you to manage orders from manufacturing to delivery with real-time status updates. With its flexible work process automation, you can fulfill orders efficiently and effectively—helping you excel in a highly competitive market and match customer expectations.

Benefits

Stronger customer relationships and improved customer satisfaction with accurate and up-to-date information

Alignment of your entire organization

Timely information and insight at your fingertips

Accurate available-to-promise commitment data

Integrated workflow setup that models business processes

Configurable order types

Flexible discount strategies and price lists with price rules

Elimination of duplication and complexity at the point of order entry

Orders are the heart of your business

Implement an industry-specific solution that allows you to administer to the customer while streamlining your order processing workflow from sales desk to installation. Manage sales order types, import sales orders and line items, and set up complex pricing. 2020 Insight includes all inquiry and import functionality associated with managing sales orders.

Pricing

Deliver timely and accurate quotes for any order with our sophisticated pricing logic that allows you to set up unique price structures for combinations of characteristics such as sales markets, product catalogs, catalog versions, products and features. Pricing is automatically calculated and rolled up based on specification during order entry. In addition, you can set up tax rates and rules, specify currencies and define general ledger classes.

Projects

Ideal for multi-family, architectural millwork, and store fixture/shop-fitter business models, manage projects with multiple sales orders and coordinate project-related activities. Create project-specific product feature sets, display history of change statuses, view lists of related file attachments and notes, and create a cost summary for all top-level items on the project.

Centralized Payment Processing

European manufacturers can define buying groups and central payment agencies and their members with centralized payment processing. In addition, manufacturers can create report information in Bewi-Data XML format that can then be transformed into DG-Diskont-Bank format, as needed.

Commissions

Pay your sales teams and representatives quickly and easily with commission calculations that are based on your business processes. Commissions can be date sensitive and can accommodate primary and secondary sales tiers. You can associate sales reps with customers, add multiple sales reps to an order and manage the distribution of commissions between sales reps. Commissions can also be based on catalog versions.

Project Bids

Developed for estimating professionals, the project bidding module is ideal for manufacturing organizations where upfront bidding is critical. Create estimates from bid catalogs based on 2020 Construct or native 2020 Insight BOMs. Manipulate data and deliver accurate bids the way your client wants to receive them. Create good, better and best bid options. Cascade specification changes. Create appropriate unit types and display a value with number of units. In addition, you can manage phased deliveries based on criteria that is important to the organization (e.g., by floor, room or piece) and roll up additional project costs, as appropriate, by industry (e.g., project fees, storage, transportation).

Electronic Order Processing

Eliminate manual entry and reduce order processing times by importing orders directly from our point of sale systems, 2020 Design and 2020 Fusion. In addition, 2020 Insight has integrations with FurnPlan Configurator and pCon Configurator (European based).

Ordering Information

IS.SOM.COR	Sales Order Management	IS.SOM.CPA	Centralized Payments
IS.SOM.COM	Commissions	IS.SOM.FUR	FurnPlan Integration
IS.SOM.PRI	Pricing	IS.SOM.FUS	2020 Fusion Order Entry
IS.SOM.PRJ	Projects	IS.SOM.ITR	EU Intrastat Processing
IS.SOM.PBD	Project Bidder	IS.SOM.PCO	pCon Configurator