



# Introducing *iMetal* Sales Order / Inquiry

Instant customer purchase history

Integrated inventory

Robust price book

Blank orders and release

Multi-Location / Multi-Currency

Integrated Multi-step process

Production Scheduling

Hard reservations of Inventory / Incoming PO

Flexible Smart Document distribution

Quote tracking with integrated CRM - Tasks/Journals

Embedded Back-to-Back option

Search by Chemical / Physical / Specs of Inventory

Contract Pricing and Review



The screenshot displays a 'Sales Document Entry' window. The top section shows 'Order Reference' details for 'Head Office' with fields for Type, Dimensions, Brh, Pcs, Wgt, Free Pcs, Free Wgt, Price, Price UOM, Date, Profit %, Info, Sale Price, and Sale Price. Below this is a table of items with columns: Item, Description, Quantity, QTY UOM, Price (Pcs), Price UOM, Selling Value, Margin %, Margin Value, and Status. The table contains three rows of data. The bottom section provides a detailed view of a selected item, including fields for Product (GK Steels), Part (T22316), Dimensions (Length: 288.000), Quantities (Pcs, Bars, Lbs), Price and Dispatch Currency (USD), and various pricing and margin fields.

## Sales Process Features

- Specialist order inquiry and entry screens tailored for different sales flows - ex stock, processing, back to back, part number driven, etc.
- Real time Inventory availability at point of order entry.
- Customer and Product based Price Books with quantity extras/discounts.
- Cost Build Up Facilities.
- Rapid access to stock information to determine material availability and commitment or check on outstanding purchase orders.
- Rapid access to Customer and/or Product related sales history.
- Automatic or User Controlled Stock Allocation.
- Enter free form descriptive information for processing, transport etc.
- Review inquiries one item at a time or at the summary level, and then rapidly convert to an order.
- Automated credit check/release/hold.
- Production Planning and Management within Sales Order entry screen.
- Standard customer profile details and instructions are linked to the delivery address chosen for the order.



**Order Reference**

Type	Dimensions	Brh	Pcs	Wgt.	Free Pcs	Free Wgt.	Price	Price UOM	Date	Profit %	Info	Sale Price	Sale Price U...
PRD	MDC	Head Office	43	4458.000	20	2079.000	0.38	Lbs					
STK	288"	Head Office	43	4458.000	43	4458.000		Lbs					
OPO	24"	Head Office	13	1350.000	13	1350.000	0.35	Lbs	31-Jan-2018		Steel Proble...		
SHI													
LST	24"	Head Office	10	1037.000			780.0000	Pcs	25-Jan-2018		95.33 Data Entry Er...		

**Customer Sales Chart** Data refreshed 2018-10-20 at 16:02:03

12 M Sales: Bar chart showing sales volume over 12 months, peaking in 2018.

12 M Sales Margin: Bar chart showing sales margin over 12 months, peaking in 2018.

Weight Tonnes: Bar chart showing weight in tonnes over 12 months, peaking in 2018.

**12 Months Sales Data**

12 Months Sales Data	2018-10	2018-11	2018-12	2019-01	2019-02	2019-03	2019-04	2019-05	2019-06	2019-07	2019-08	2019-09	2019-10	Total
Sales	0	0	0	0	0	0	0	0	37977	72581	25886	23041	0	81385
VAT	0	0	0	0	0	0	0	0	1034	0	0	0	0	1034
Cost	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Margin	0	0	0	0	0	0	0	0	37977	72581	25886	23041	0	81385
Totals	0	0	0	0	0	0	0	0	10604	78742	30322	26044	0	85311

## Order Entry Features

- Win more deals - find and build stronger relationships.
- Track pricing, minimum order quantities and lead times.
- Show available inventory to prevent overselling.
- Comprehensive on-line order status inquiry.
- Start and complete for each process of multi-stage production.
- Automated notification of system event or user action.
- Customer and product sales analysis.
- Ranking reports for customers, products and sales staff.
- Improve productivity and performance.

## Service your Customers

- Create positive customer experiences faster.
- Spend less time searching for paperwork and more time engaging.
- Respond quickly to quality issues, changing customer specifications, and obsolete parts to ensure compliance and mitigate delays.
- Helping Customers help themselves.
- Executive management dashboard.



Our customers don't care how much we know, until they know how much we care.

Our client facing team members have many years of experience working in and supplying the metals sector with functionally specific software. Our consultants are focused on delivering results with minimum cost and maximum attention to detail, ensuring you get a return on your investment, not just a good-looking set of screens.

Equation Technologies and Jonas Metals work together to bring a complete ERP solution by combining Sage Intacct's best-in-class financial management with iMetal's game changing industry functionality in the USA, Canada, and the United Kingdom.



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