

RELEVANT MANAGEMENT TOOLS



Keeping an Eye on Your Business with TrulinX Quick, Efficient, Helpful Business Tools

SALES / EXPEDITING TOOLS

Gross Margin Management – Immediate e-mail notification upon entry of a quote and/or order that contains an unacceptable margin

Purchase Order Vendor Recap Report – An automated faxed report that requires the vendors to acknowledge outstanding Purchase Orders, so you can better serve your customers

Sales Order Customer Expedite Report – Sales Expedite report by Sales Order, Part, and then PO, so you can contact those customers which may no longer get their items when promised

Customer Service Level Report – Lists the number and percentage of orders shipped on time or late.

A/R Aging by Sales Rep – An Excel based query that you can give to your outside sales staff as a tool

ACCOUNTING TOOLS

Credit Hold Notification – Immediate e-mail notification upon entry of a quote and/or order that contains a Credit Hold Customer

A/R Aging by Customer Report – A report that can sort by the dollar amount past due to determine which accounts require the most attention

Average Cost Adjustments Report – Lists item average cost adjustments made, including the reason for the change

MANAGEMENT REPORTING

Sales Rep Management – Bookings, Backlog, Quotes, and Invoice by Territory reporting

Pick Ticket Not Shipped Report – Identifies all pick ticket lines that have not yet been shipped or invoiced. This helps prevent lost billings due to lost pick / pack lists; instances when the pick ticket is accidentally sent to the customer, etc.

Vendor Service Level by Location Report – Lists the number and percentage of orders shipped on time

Vendor Summary/Vendor Volume Report – Manage vendors more effectively and get the maximum discount possible or free freight

INVENTORY MANAGEMENT

Item List – A report that lists all the new items entered on-the-fly that day by customer service

Excess Inventory Evaluation Process – Determines Excess Inventory based on Actual or FMD

Inactive Item Selection Process – Determines items that have little or no action

Dedicated Customer Inventory Report - Inventory that is on hand but committed to customer orders

Inventory Stock Out Query – Excel based list of items that are in a Stock Out position, alerting you to better serve your customer

Purchase Order Variance Report – Lists PO's where there is a cost discrepancy between the purchase order and the invoice

Negative On Hand Inventory Report – Lists all items that have a negative on-hand quantity