



**order management software**  
for web, mail order & b2b sales

# **Delstree Control**

## **Overview**

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## 1 Introduction

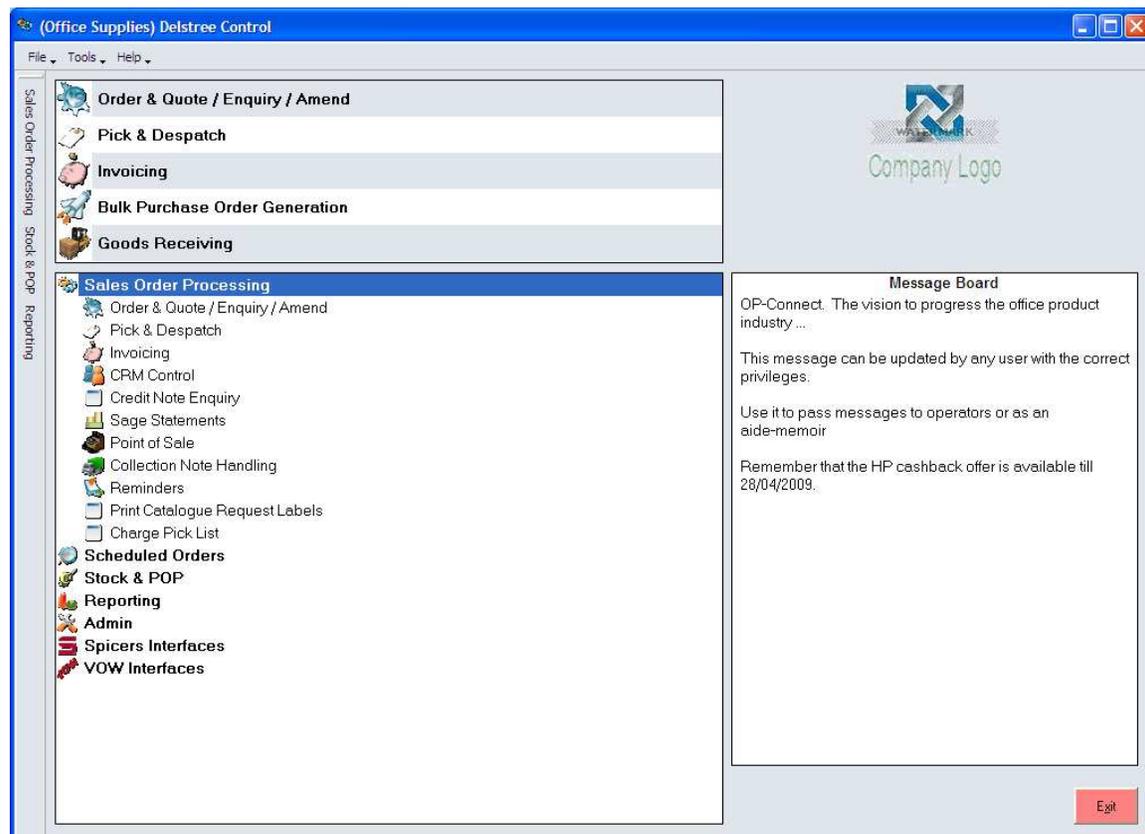
Delstree Control is a modern, fast and flexible Order & Customer Management software package that can be tailored to reflect the way that you do business today and in the future.

Delstree gives you a flexible, networked and integrated system that will allow your business to flourish. Being customer focussed is a whole lot easier when your computer system fully integrates web, customer, inventory and Sage information with the complete order processing cycle.

All aspects of the business process are catered for, from taking the initial enquiry, processing quotations, converting them into an order or processing orders directly. Full integration the stock system ensures that stock and courses cannot be oversold.

Accounts information can be exported to 3<sup>rd</sup> party accounts packages or the whole process integrates with Sage – this includes the creation of Sage Sales Account records are done when a customer is set up or when an order is placed. When an order is completed the invoice updates the relevant Sage sales and nominal accounts.

All documentation is based on word templates, giving flexibility to create all documents in line with corporate colours, logos and layout. All documents can be reprinted or emailed directly from Delstree Control either as a Word or PDF attachment.

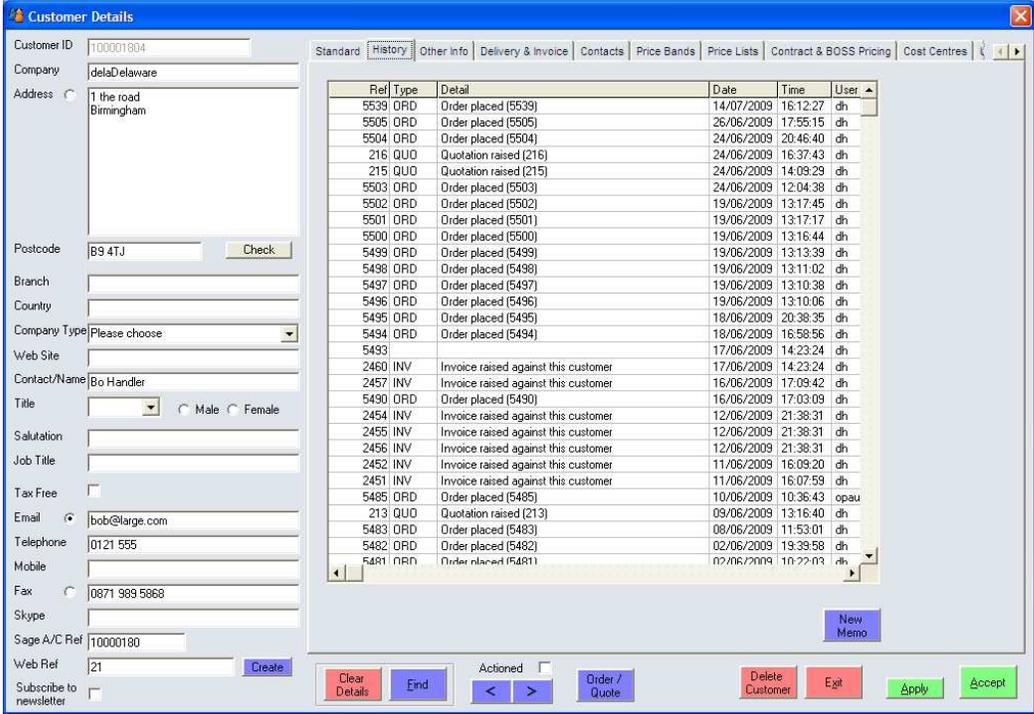


All of the functionality provided by Delstree Control is made available through a single environment. An intuitive and easy-to-use menu system allows security level access to all of the modules.

Alternatively, where users only require access to a specific module, for instance reporting or order management those individual modules can be made available to them.

## 2 Customer Contact Management

All activities are recorded against the ordering and delivery customer. Delstree Control maintains a full history of enquiries and quotation requests into the business, conversion rates, as well as allowing ad-hoc history updates to be placed against customers, either as bulk updates or individually.



**Customer Details**

Customer ID: 100001804  
 Company: delaDelaware  
 Address: 1 the road, Birmingham  
 Postcode: B9 4TJ  
 Branch:   
 Country:   
 Company Type: Please choose  
 Web Site:   
 Contact/Name: Bo Handler  
 Title:   
 Salutation:   
 Job Title:   
 Tax Free:   
 Email: bob@large.com  
 Telephone: 0121 555  
 Mobile:   
 Fax: 0871 999 5868  
 Skype:   
 Sage A/C Ref: 10000180  
 Web Ref: 21  
 Subscribe to newsletter:

Ref	Type	Detail	Date	Time	User
5539	ORD	Order placed (5539)	14/07/2009	16:12:27	dh
5505	ORD	Order placed (5505)	26/06/2009	17:55:15	dh
5504	ORD	Order placed (5504)	24/06/2009	20:46:40	dh
216	QUO	Quotation raised (216)	24/06/2009	16:37:43	dh
215	QUO	Quotation raised (215)	24/06/2009	14:09:29	dh
5503	ORD	Order placed (5503)	24/06/2009	12:04:38	dh
5502	ORD	Order placed (5502)	19/06/2009	13:17:45	dh
5501	ORD	Order placed (5501)	19/06/2009	13:17:17	dh
5500	ORD	Order placed (5500)	19/06/2009	13:16:44	dh
5499	ORD	Order placed (5499)	19/06/2009	13:13:39	dh
5498	ORD	Order placed (5498)	19/06/2009	13:11:02	dh
5497	ORD	Order placed (5497)	19/06/2009	13:10:38	dh
5496	ORD	Order placed (5496)	19/06/2009	13:10:06	dh
5495	ORD	Order placed (5495)	18/06/2009	20:38:35	dh
5494	ORD	Order placed (5494)	18/06/2009	16:58:56	dh
5493			17/06/2009	14:23:24	dh
2460	INV	Invoice raised against this customer	17/06/2009	14:23:24	dh
2457	INV	Invoice raised against this customer	16/06/2009	17:09:42	dh
5490	ORD	Order placed (5490)	16/06/2009	17:03:09	dh
2454	INV	Invoice raised against this customer	12/06/2009	21:38:31	dh
2455	INV	Invoice raised against this customer	12/06/2009	21:38:31	dh
2456	INV	Invoice raised against this customer	12/06/2009	21:38:31	dh
2452	INV	Invoice raised against this customer	11/06/2009	16:09:20	dh
2451	INV	Invoice raised against this customer	11/06/2009	16:07:59	dh
5485	ORD	Order placed (5485)	10/06/2009	10:36:43	opau
213	QUO	Quotation raised (213)	09/06/2009	13:16:40	dh
5483	ORD	Order placed (5483)	08/06/2009	11:53:01	dh
5482	ORD	Order placed (5482)	02/06/2009	19:39:58	dh
5481	ORD	Order placed (5481)	02/06/2009	10:22:03	dh

Buttons: Clear Details, End, Actioned, Order / Quote, Delete Customer, Exit, Apply, Accept, New Memo

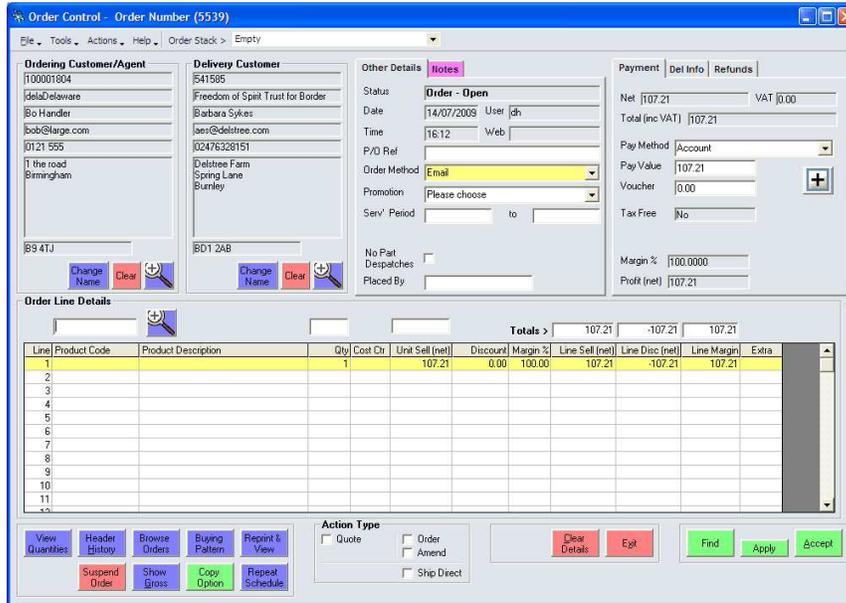
Contacts are treated as suspects, prospects, customers and delivery addresses based on their enquiry and ordering activities. Standard reports allow quick and easy analysis of where and how sales are achieved.

The preferred method of receiving correspondence is recorded against each customer, which can be via email or printed media.

Separate correspondence groups can be assigned to customers to provide different Word® templates to be used when generating invoices, purchase orders and other documents.

### 3 Order Management

Fully integrated with stock and customer management, the “Order Control” module provides a single holistic view of current and completed enquiries, demonstrations, quotations and orders.



New orders, enquiries and quote conversions are done from a single screen. Numerous search criteria, for example, customer purchase order number, product code, order date (<, >, = or = plus or minus 28 days), order or customer information (postcode, company name, contact name or telephone number) can be used to find outstanding or completed quotations or orders.

Full order amendment is audited to show who, when and what has been amended. Order amendment is allowed right up the point that an order is complete – this includes adding new lines and cancellations.

The easy to use and intuitive layout allows speedy order entry whether you prefer to use the keyboard on its own or are happier clicking your way around all of the options with the mouse.

Multiple payments types accepted. Simply choose the payment method from the drop down list or use the default customer payment method to reduce time and errors. Orders paid on account integrate with Sage.

Order correspondence can be printed or emailed. All documents can be reprinted and is templated giving full control of look and feel, enabling all correspondence that goes to customers and suppliers to reflect the business spirit.

Easy entry of ordering and delivery customer details. Repeat customers easily retrieved, be they delivery or ordering customers.

Track enquiries, demonstrations and quotations with automatic reminders so that you do not forget to follow up. Delstree Control provides full tracking where an enquiry is converted from an enquiry to a quotation, right through to conversion into an order.

### 4 E-commerce Integration

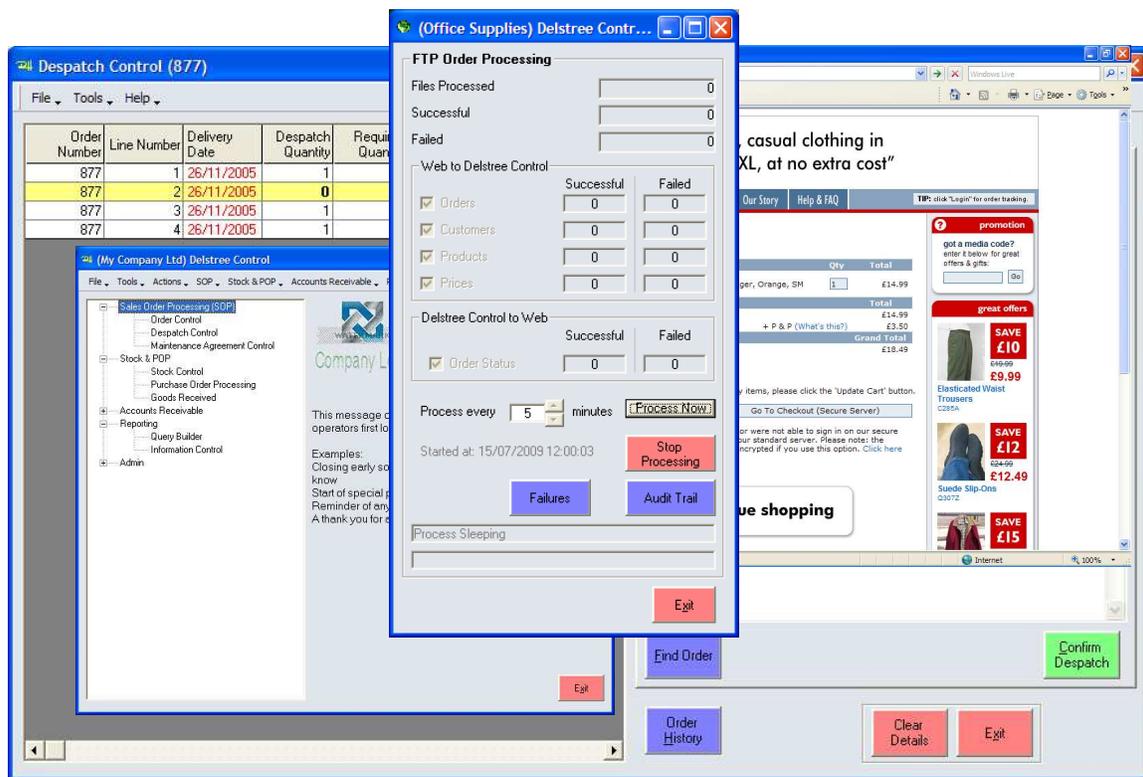
Need of a truly integrated order management solution that incorporates web sales and quotations from multiple web sites, including eBay?

“Web Order Control” provides seamless integration for transactional web sites into Delstree Control using email, secure data transfers or if you’re an eBay trader a direct and secure link to your eBay account.

No longer will you need to worry about downloading orders or remembering to check all of your online management consoles every half an hour, because “Web Order Control” automatically polls your web sites for new orders at regular intervals. All orders and quotations are then processed through Delstree Control allowing you to pick, pack and despatch as if they were orders taken over the phone.

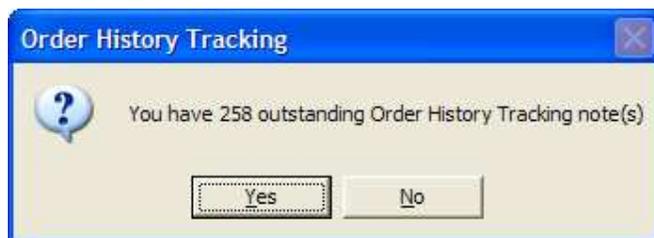
## 5 Despatch & Invoicing

All outstanding orders are tracked through Despatch Control, so that no invoicing slips through the net. Invoices are generated as part of the despatch process and can be reprinted or emailed through order control.



## 6 Order Tracking Reminders

Tracking records are generated by the system to remind operators that an enquiry, demonstration or quotation has been raised and requires following up.



Once a tracking record becomes due, the operator is prompted each time they log onto the Control system and it is actioned or extended.

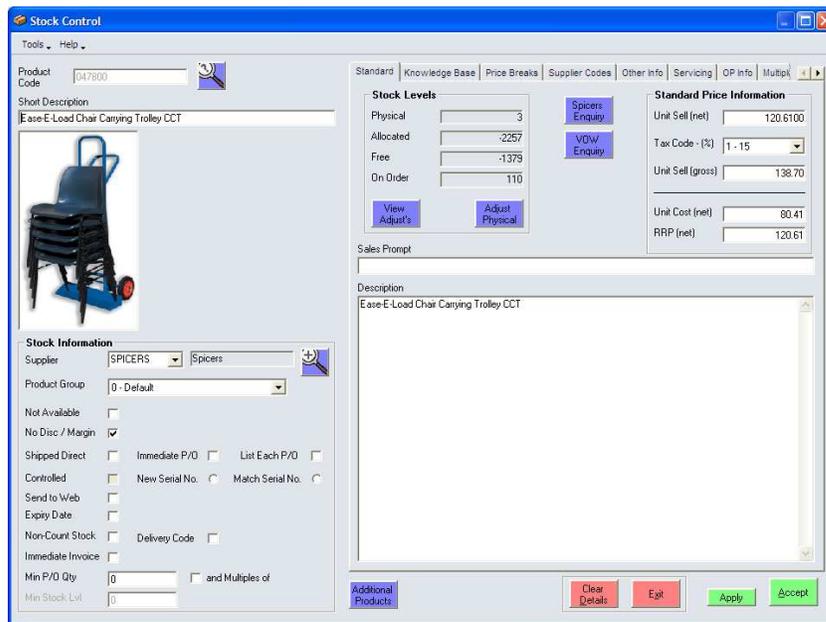
Ad-hoc tracking records can be created by an operator.

## 7 Returns & Refunds

Returns & refunds are all handled through the standard order management screen. Credit note generation and replacement tracking are all integrated and easy to use and manage.

## 8 Stock Control

Integrated stock control provides a simple and effective interface with order processing and despatch control. Stocked items, maintenance agreements and shipped direct products are all handled as standard. Where individual or batches of products use serial number these are maintained and tracked throughout the system.



Stock control provides a quick and easy method for setting up new products and courses.

Stock or the number of available places on a course can be set up at the point of setting up a new course or at the point it is available for booking.

As courses are booked through order control the free stock figure will be reduced until it reaches 0, whereby operators can be stopped from placing any more orders and over-booking courses.

Products can be assigned to product groups to make for easier reporting to identify which types of courses are, for example, most popular.

The product group can also be used to assign different courses to different cost of sale nominal structures.

## 9 Sage Active

As a Sage Developer partner, Delstree Control provides real-time integration with Sage Line 50 – the “Sage Active” interface. This ensures that all data required for Sage is entered once only, in Delstree Control and there is no requirement to not re-entered data in Sage.

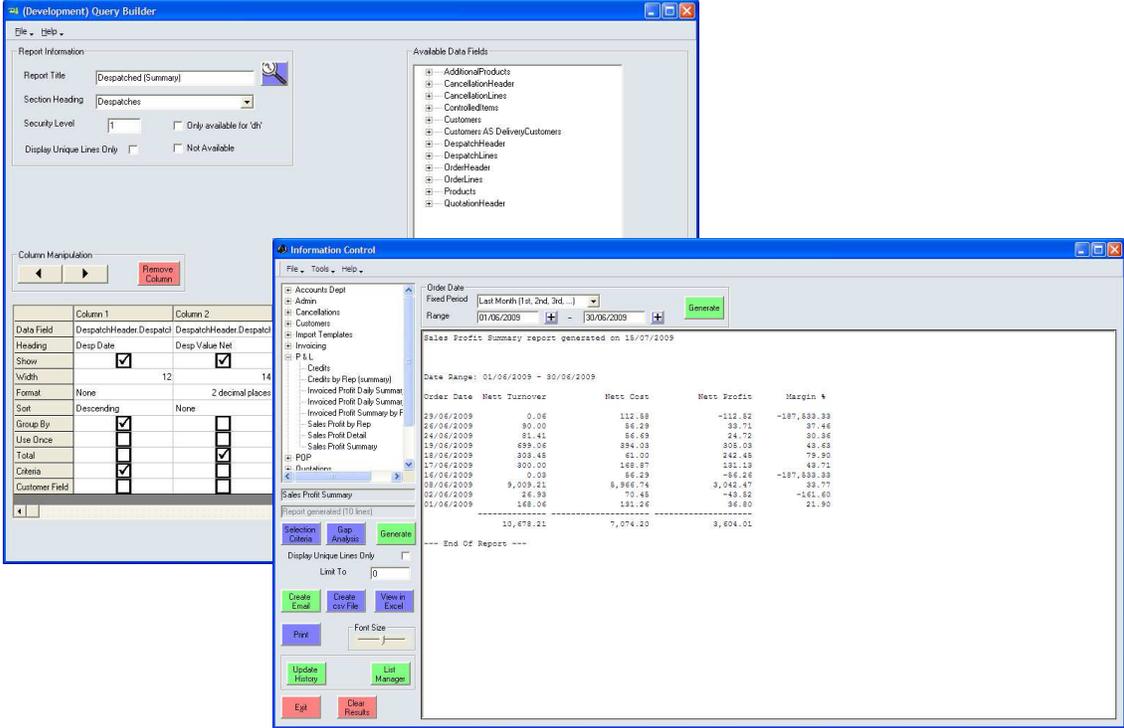
Nominal structures can be defined with Delstree Control for the following:

- MaterialsPurchased
- PurchasingCarriage
- DefaultBankAccount
- DefaultSales
- SalesDistributionAndCarriage

It should be remembered that Sage Active does not replace Sage Line 50, and separate Sage licences are required.

## 10 Reporting & Analysis

Delstree Control provides an easy to use reporting tool for building and generating reports, both standard and ad-hoc. Simple drag and drop report headings are used to create reports, be they based on sales, despatches, products, customers or any other aspect of Delstree Control. Reports have security levels assigned to them therefore allowing restricted access to specific reports.



The screenshot displays two windows from the Delstree Control reporting tool. The top window is the 'Query Builder' and the bottom window is the 'Information Control'.

**Query Builder (Top Window):**

- Report Information:** Report Title: Despatched (Summary), Section Heading: Despatches, Security Level: 1, Display Unique Lines Only:
- Available Data Fields:** A list of fields including Accounts, Customers, Despatches, Orders, and Products.
- Column Manipulation:** A table for defining report columns.

	Column 1	Column 2
Data Field	DespatchHeader (Despatch)	DespatchHeader (Despatch)
Heading	Desp Date	Desp Value Net
Show	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Width	12	14
Format	None	2 decimal places
Sort	Descending	None
Group By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Use Once	<input type="checkbox"/>	<input type="checkbox"/>
Total	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Criteria	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Field	<input type="checkbox"/>	<input type="checkbox"/>

**Information Control (Bottom Window):**

- Order Date:** Fixed Period: Last Month (1st, 2nd, 3rd...), Range: 01/06/2009 - 30/06/2009
- Data Range:** 01/06/2009 - 30/06/2009
- Report:** Sales Profit Summary
- Table:**

Order Date	Nett Turnover	Nett Cost	Nett Profit	Margin %
23/06/2009	0.06	112.89	-112.82	-187,833.33
26/06/2009	90.00	86.29	33.71	37.46
24/06/2009	81.41	56.69	24.72	30.36
19/06/2009	699.08	894.05	308.03	48.63
18/06/2009	305.85	61.00	244.85	79.90
17/06/2009	300.00	168.87	131.13	43.71
16/06/2009	0.00	86.29	-86.29	-187,833.33
08/06/2009	9,009.21	8,946.74	3,042.47	33.77
02/06/2009	26.99	70.46	-43.52	-161.60
01/06/2009	548.06	131.26	36.80	21.90
<b>Total</b>	<b>10,478.21</b>	<b>7,074.20</b>	<b>3,604.01</b>	

Reports can be displayed on screen, printed or viewed in Microsoft Excel.

For marketing and customer service purposes any report generated that contains a customer number can be used to update that group of customers' history, just by using the “Update History” button. Really useful where you generate a report of customers, view the data in Excel ready for a mail merge and need to update the customer history to record the fact that a letter has been sent.

Delstree Control runs on a MySQL or Microsoft SQL Server database, therefore providing an industry standard database that can be utilised by a host of off-the-shelf reporting tools.

## **11 Clever 3<sup>rd</sup> Party Integration**

Delstree Control uses the latest technologies to integrate with 3<sup>rd</sup> party systems. This includes secure SOAP & XML links to online services.

Currently, links to all Spicers EDI links are available to do real-time stock checks, integrate with the OSCARnet web site and automate purchase order generation.

## **12 Remote Access**

Delstree Control has been developed to work effectively and efficiently over a VPN link even where the client is accessing via a low speed mobile phone link.

Security and Saleability are provided by using the inherent modules within the Windows Server products or by using state-of-the-art SonicWall networking hardware and software.

## **13 Implementation & Training**

Buying Delstree Control is not just taking the software package and running with it on your own. As part of the analysis we will work together to identify “pain points” within the business process and devise a solution that overcomes those issues.

Delstree prides itself in delivering a solution that is fit for purpose today and in the future. To ensure that the following list details our approach:

- Analysis of current processes
- Documented proposal of solution
- Development of specific requirements
- Implementation
  - Network requirements
  - Server setup
  - Software and SQL database installation
- Training
  - SQL database administration (users, backups, etc)
  - Delstree Control administration (users, releases, general maintenance)
  - Sales Order Processing
  - Stock & POP
  - Reporting & Analysis
  - Word templates (Correspondence – order confirmation, quotations, invoices, purchase orders)
  - Mail Merges (optional)