

Inventory Management - Integrated Orders Full Subscription Model



- *Why aren't we closing more deals?*
- *Why are forecasts never accurate?*
- *Why is my inventory on-hand never accurate?*
- *Why can't we have our information in one place?*
- *What did our customers order in the past?*
- *Are we meeting our customer expectations?*
- *Is our Sales & Billing process customer centric?*

- *Always know what's on-hand, last price and what's allocated.*
- *With Customer Returns, never wait for updates of quantity on hand or return issues.*
- *Allow your accounting staff to work with GL/CA transactions only.*
- *Order fulfillment by standing orders - track set pricing, allocated items and remaining items.*
- *Engage your customer every step of the order with work flows and the Matrix customer web portal.*

Matrix velocity is a designed process to accelerate the sales cycle and manage customer expectations while providing a nimble environment for your sales team and staff.

Developed natively on the Salesforce.com CRM platform, Matrix delivers customer centric work flows, approvals and a quoting engine that is flawless to the nth degree.

For best feature results we recommend Enterprise. Matrix will run in Professional with some feature not accessible.

The Matrix inventory capability is world class; Close down sneaker net, empower Matrix to empower your sales team with accurate and timely information. For advanced warehouse inventory management requirements, ask about **mthree bar code and RFID** inventory management.

Matrix is fully integrated with a Service Level Agreement Module for field and depot services. Track your customers item history associated with sales orders to create entitlements, set warranty periods, collect serial numbers and manage configurations.



Quoting: Quote/Order Price List:

- ◆ Multiple quotes can be generated for one opportunity with the primary quote reporting to the sales forecast.
- ◆ Convert one quote or select multiple quotes into one order rollup.
- ◆ *Automatic subscription billing cycles, set duration, day and month for invoicing & auto-fill to forecasts.*
- ◆ Quotes allow for multiple shipping location per account and contact.
- ◆ Quick Order option for those one-off sales with auto-fill to sales pipeline.
- ◆ *Standing orders can be fulfilled over time with automatic workflows and invoicing as items are released.*
- ◆ Create an opportunity with quotes, convert to a sales order with one click.
- ◆ Automatic attachments can be setup to accompany the quote or order.
- ◆ Support line item cloning in opportunity, quotes and orders to keep your sales rep nimble.
- ◆ Line item view has list price, sales price, discount, description, quantity sold and extended total.
- ◆ *Within line item view just click to view quantity on-hand and quantity on back order. (WS)*
- ◆ Supports multiple units of measure i.e., pallet, case, feet, inches.
- ◆ Weight for each item is displayed on the order with total weight of shipment per order.
- ◆ Create customer specific pricebooks and master catalogs.
- ◆ Margin Analysis - send work flow approvals when discounts fall below a set level on orders.
- ◆ Credit rating, total credit and available credit with auto alerts and approval process.
- ◆ Historical price look up, last price paid.
- ◆ Pending order ability to scrub orders before releasing to ERP.
- ◆ Email of Orders to multiple recipients and automatic attachments.
- ◆ *Track credit rating to Order (based on Account).*
- ◆ *Flash Notes to Campaigns to push to Accounts.*
- ◆ *Track Sales tax chart on Account level also.*

Inventory:

- ◆ Supports category lists for groups of items by system configuration.
- ◆ Multiple price books/catalogs for customer with specific pricing.
- ◆ Move inventory into a place holder for large projects, production setup and long duration delivery.
- ◆ *Parent to child relationship for inventory items.*
- ◆ Track item weight for auto configuration of total weight per order for LTL or FTL.
- ◆ Quote subscription pricing including recurring and non-recurring charges.
- ◆ Supports 2-part number cross reference, editable description, discount and sold price with COG view.
- ◆ Batch entry of product serial numbers, warranty information.
- ◆ *ERP data connections to Matrix velocity inventory lists, catalogs and types.*
- ◆ Account item history tracks Warranty Status, Serial number, SLA and last Order/Price.
- ◆ *Create purchase orders for inventory and receive against open POs.*
- ◆ *Return merchandise authorization (RMA) back to inventory based on client PO, invoice or order.*
- ◆ *Inventory master with quantity on hand, on order, allocated and multiple UOM.*
- ◆ *Receive new inventory items against purchase orders and automatically update quantity on hand.*
- ◆ *Freight Type and Ship Via drop downs.*
- ◆ *Commit order creates Invoice in Matrix, forwards to fulfillment.*
- ◆ *Subscription products tied to Invoice created automatically.*
- ◆ *Upon the final "Sales Order" when the "Invoice" button is selected allow for check box to create pick ticket or packing slip or manifest.*

Service Request Orders:

- ◆ Create service request and case tickets for time and material, against SLA or warranty.
- ◆ Schedule preventive maintenance on equipment with work flow alerts for open, in progress and closed.
- ◆ SLAs detail by total value and profitability.
- ◆ *Automatic subscription billing cycles and expiration alerts.*
- ◆ Tracks parts usage, labor, travel time, lodging, milage, and airfare for complete and accurate billing.