

Selling



Executive Summary

In today's competitive retail landscape, sales leaders need tools that ensure pricing accuracy, strengthen governance, and accelerate order cycles. iVendNext empowers teams to convert quotations into clean orders, streamline deliveries, and generate timely invoices. With built-in analytics, managers gain real-time visibility into sales performance, territories, and profitability, while customer-specific pricing and loyalty programs build stronger relationships. The result is faster sales execution, healthier cash flow, and improved customer satisfaction across every channel.

Configuration & Controls

Enforce pricing discipline, tax compliance, and document controls with iVendNext. Safeguard margins, standardize processes, and keep every sales transaction consistent.

Features	Description
Convert expired quotations to Sales Orders	Convert expired quotations into Sales Orders when exception approvals permit, preserving agreed terms and conditions.
Edit price list rates on documents	Edit price list rates directly on sales documents when approved exceptions are required, without changing master records.
Use negative item rates	Permit negative item rates for special cases like refunds, returns, or promotional adjustments directly on sales documents.
Enter duplicate item rows in a document	Enter the same item multiple times in a document to manage separate schedules, pricing, or packaging requirements.
Create multiple Sales Orders for one PO	Generate multiple Sales Orders from a single customer Purchase Order, ensuring flexibility in scheduling and fulfillment.
Selling Settings	Configure global selling settings including default price lists, taxes, and document rules to standardize all sales transactions.

Selling Settings

Customer Defaults

Customer Naming By: Naming Series

Default Territory: United States

Default Customer Group: Individual

Item Price Settings

Default Price List: Standard Selling New York

☐ Maintain Same Rate Throughout Sales Cycle
☒ Allow User to Edit Price List Rate in Transactions
☐ Validate Selling Price for Item Against Purchase Rate or Valuation Rate
☐ Calculate Product Bundle Price based on Child Items' Rates
☐ Allow Negative rates for Items

Transaction Settings

Is Sales Order Required for Sales Invoice & Delivery Note Creation? No

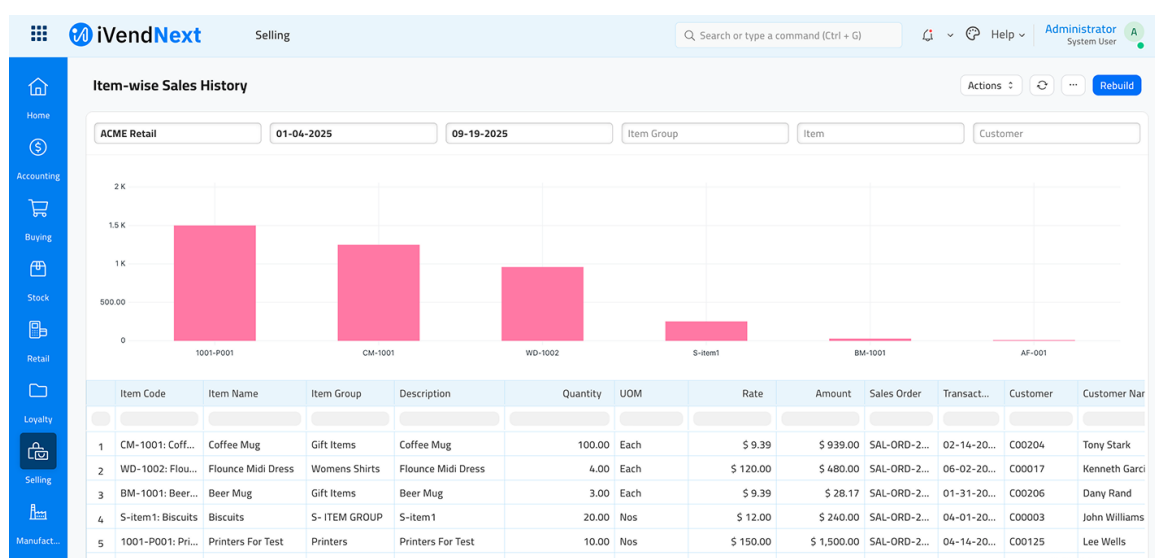
Is Delivery Note Required for Sales Invoice Creation? No

☒ Allow Item to be Added Multiple Times in a Transaction
☐ Allow Multiple Sales Orders Against a Customer's Purchase Order
☐ Allow Sales Order Creation For Expired Quotation

Sales & Quotation Management

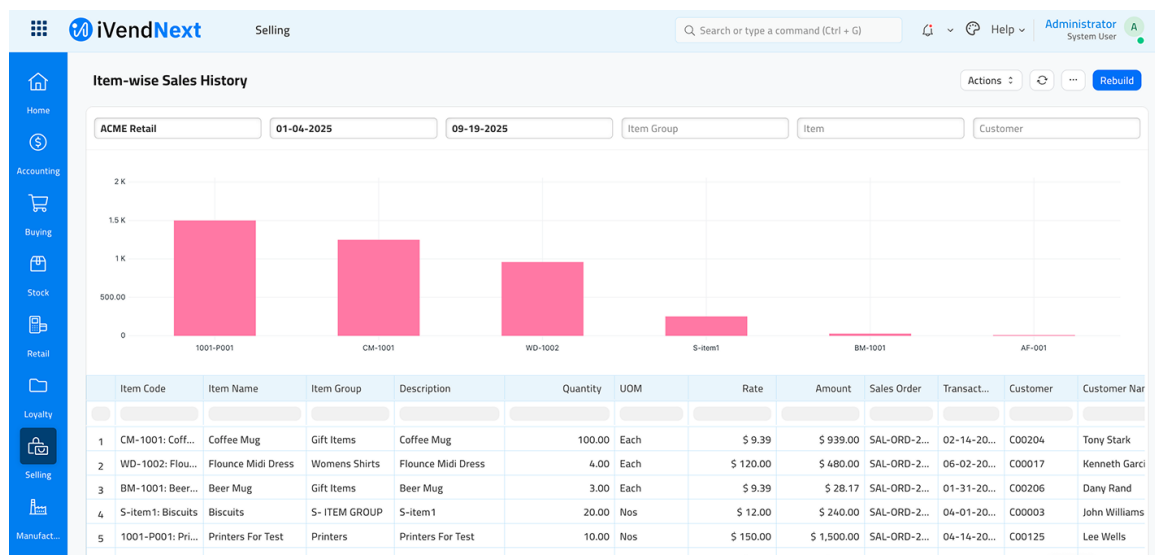
Standardize quotations, pricing rules, and approval workflows in iVendNext. Convert demand into clean sales orders with clarity, speed, and reduced errors.

Features	Description
Quotation	Prepare detailed quotations with pricing, terms, and validity, then convert to Sales Orders through controlled approvals.
Sales Order	Capture confirmed customer demand with schedules and stock reservations, linking seamlessly to delivery and invoicing workflows.
Pricing Rule	Configure conditional pricing rules for discounts, markups, and promotions, applied automatically during quoting and ordering.
Terms & Conditions	Standardize contractual terms by embedding them directly into quotations and orders, ensuring compliance and consistency.
Campaign	Manage campaigns linked to quotations and orders, enabling lead follow-up and measuring sales conversion from promotions.
Payment Terms Template	Define flexible payment terms and apply them across quotations, sales orders, and invoices to align with customer agreements.
Sales Taxes & Charges Template	Predefine tax and charge templates and apply them to sales transactions for consistent compliance and accurate reporting.



Sales & Quotation Management

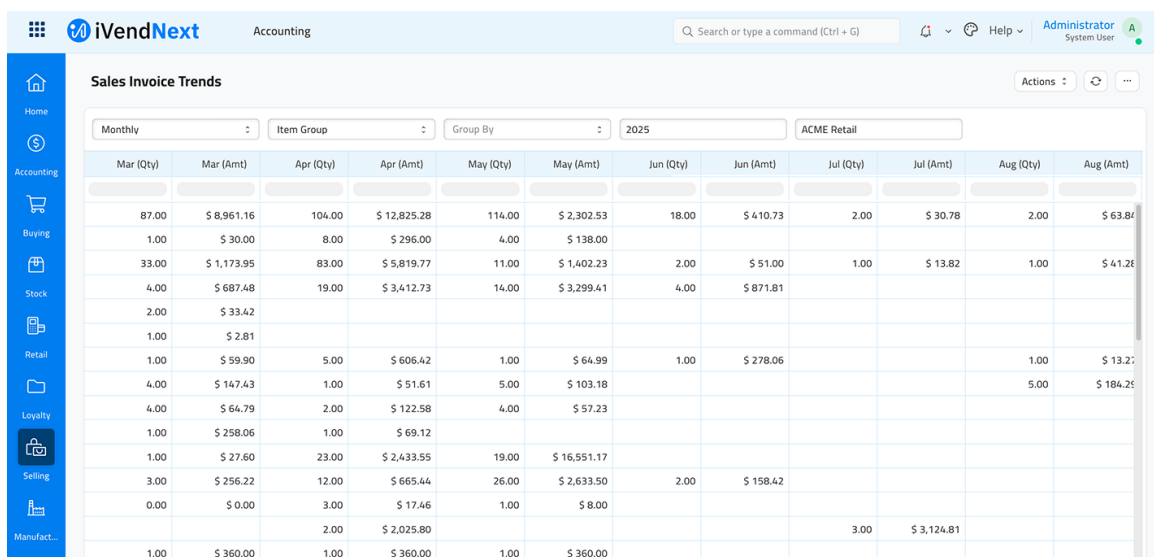
Features	Description
Sales Scheme	Configure separate UOMs for stock and purchasing in iVendNext with auto-conversions, maintaining consistency and reducing transaction errors.
Coupon Code	Track subcontracting by issuing raw materials to vendors and receiving finished goods, with backflushed consumption in iVendNext.
Alternative Item Suggestion	Record customer-provided materials in iVendNext, consume them in production or return them as needed, ensuring full traceability and accuracy.
Quotation Validity Controls	Create shipments linked to delivery notes, generate carrier labels, and track consignments directly in iVendNext for end-to-end visibility.
Quotation-to-Order Workflow	Manage multiple shipments in iVendNext by linking carriers, delivery documents, and labels for streamlined logistics and traceability.
Multi-Currency Quotations	Generate and print carrier-compliant shipping labels, packing slips, and documentation directly from iVendNext for error-free dispatches.
Quotation Templates	Define and manage box configurations, packing slips, and weights in iVendNext, ensuring smooth fulfilment and compliance with carriers.



Order Fulfillment & Delivery

Plan, reserve, and dispatch goods with iVendNext. Support drop-shipments, partial deliveries, and warehouse operations with full traceability and accuracy.

Features	Description
Delivery Note	Record confirmed deliveries with item details, batches, and tracking. Supports partial shipments linked to orders and invoices.
Drop Ship	Ship items directly from suppliers to customers by linking Purchase Orders with Sales Orders, reducing handling overhead.
Pick List	Generate pick lists from Sales Orders, validate items with barcode scan, and streamline warehouse picking accuracy.
Packing Slip	Create packing slips with bundled or individual items, ensuring shipments are packaged and tracked with batch/serial numbers.
Shipment Tracking	Record carrier and tracking details on deliveries, providing customers with visibility and linking shipments to invoices.
Return Handling	Process sales returns with linked credit notes or replacement orders, ensuring inventory and accounts remain accurate.
Warehouse Reservation	Reserve stock for confirmed orders to prevent allocation conflicts and ensure timely, accurate fulfillment.

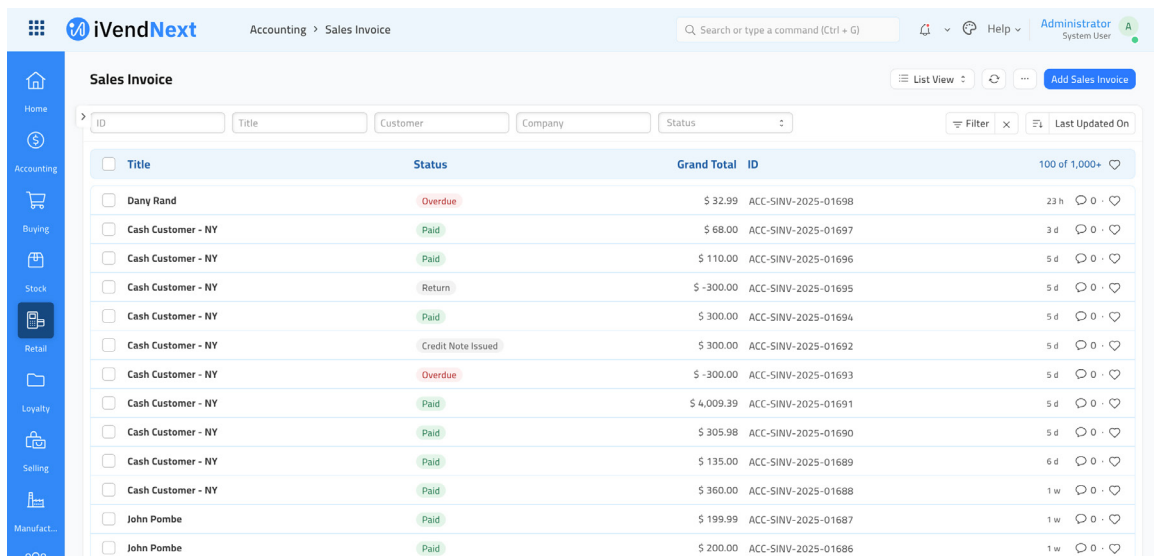


Sales Invoice Trends											
Monthly		Item Group		Group By		2025		ACME Retail			
Mar (Qty)	Mar (Amt)	Apr (Qty)	Apr (Amt)	May (Qty)	May (Amt)	Jun (Qty)	Jun (Amt)	Jul (Qty)	Jul (Amt)	Aug (Qty)	Aug (Amt)
87.00	\$ 8,961.16	104.00	\$ 12,825.28	114.00	\$ 2,302.53	18.00	\$ 410.73	2.00	\$ 30.78	2.00	\$ 63.84
1.00	\$ 30.00	8.00	\$ 296.00	4.00	\$ 138.00						
33.00	\$ 1,173.95	83.00	\$ 5,819.77	11.00	\$ 1,402.23	2.00	\$ 51.00	1.00	\$ 13.82	1.00	\$ 41.28
4.00	\$ 687.48	19.00	\$ 3,412.73	14.00	\$ 3,299.41	4.00	\$ 871.81				
2.00	\$ 33.42										
1.00	\$ 2.81										
1.00	\$ 59.90	5.00	\$ 606.42	1.00	\$ 64.99	1.00	\$ 278.06			1.00	\$ 13.27
4.00	\$ 147.43	1.00	\$ 51.61	5.00	\$ 103.18					5.00	\$ 184.25
4.00	\$ 64.79	2.00	\$ 122.58	4.00	\$ 57.23						
1.00	\$ 258.06	1.00	\$ 69.12								
1.00	\$ 27.60	23.00	\$ 2,433.55	19.00	\$ 16,551.17						
3.00	\$ 256.22	12.00	\$ 665.44	26.00	\$ 2,633.50	2.00	\$ 158.42				
0.00	\$ 0.00	3.00	\$ 17.46	1.00	\$ 8.00						
		2.00	\$ 2,025.80					3.00	\$ 3,124.81		
1.00	\$ 360.00	1.00	\$ 360.00	1.00	\$ 360.00						

Invoicing & Collections

Ensure accurate billing and timely collections with iVendNext. Link invoices to deliveries, apply taxes and discounts, and track receivables in real time.

Features	Description
Sales Invoice	Generate invoices directly from orders or deliveries with taxes, discounts, and terms, ensuring accurate and auditable receivables.
Credit Note	Issue credit notes linked to invoices for returns, adjustments, or refunds, keeping accounts transparent and reconciled.
Collections Tracking	Monitor customer payments against invoices, apply receipts, and enforce payment terms to improve cash flow and reduce risk.



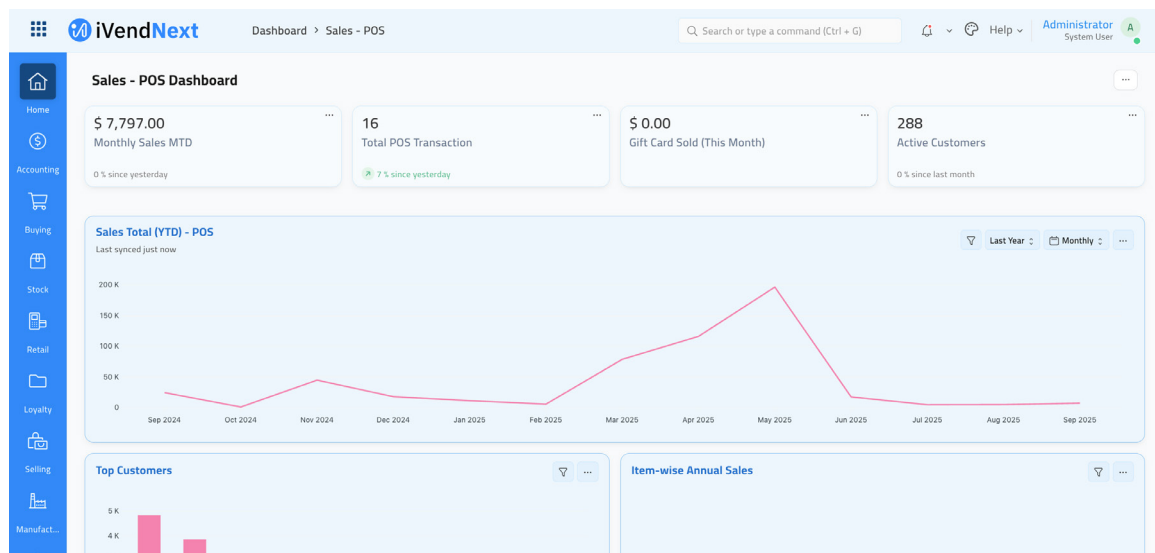
The screenshot shows the iVendNext web application interface for the 'Sales Invoice' section. The top navigation bar includes the iVendNext logo, the path 'Accounting > Sales Invoice', a search bar, and user information for 'Administrator System User'. A left sidebar contains icons for Home, Accounting, Buying, Stock, Retail, Loyalty, Selling, and Manufacturing. The main content area displays a table of sales invoices with columns for Title, Status, Grand Total, ID, and Last Updated On. The table lists 13 invoices with various statuses like 'Overdue', 'Paid', and 'Return'. A 'Filter' button and a 'List View' toggle are visible above the table. A '100 of 1,000+' indicator is shown at the bottom right of the table header.

Title	Status	Grand Total	ID	Last Updated On
Dany Rand	Overdue	\$ 32.99	ACC-SINV-2025-01698	23 h
Cash Customer - NY	Paid	\$ 68.00	ACC-SINV-2025-01697	3 d
Cash Customer - NY	Paid	\$ 110.00	ACC-SINV-2025-01696	5 d
Cash Customer - NY	Return	\$ -300.00	ACC-SINV-2025-01695	5 d
Cash Customer - NY	Paid	\$ 300.00	ACC-SINV-2025-01694	5 d
Cash Customer - NY	Credit Note Issued	\$ 300.00	ACC-SINV-2025-01692	5 d
Cash Customer - NY	Overdue	\$ -300.00	ACC-SINV-2025-01693	5 d
Cash Customer - NY	Paid	\$ 4,009.39	ACC-SINV-2025-01691	5 d
Cash Customer - NY	Paid	\$ 305.98	ACC-SINV-2025-01690	5 d
Cash Customer - NY	Paid	\$ 135.00	ACC-SINV-2025-01689	6 d
Cash Customer - NY	Paid	\$ 360.00	ACC-SINV-2025-01688	1 w
John Pombe	Paid	\$ 199.99	ACC-SINV-2025-01687	1 w
John Pombe	Paid	\$ 200.00	ACC-SINV-2025-01686	1 w

Analytics & Reporting

Gain real-time insights into sales performance with iVendNext. Track targets, profitability, and forecasts to guide smarter decisions and growth strategies.

Features	Description
Sales Analytics Report	Analyze sales by item, customer, territory, or period with interactive charts and pivot views to track growth and mix shifts.
Sales Pipeline Analysis	Track leads and opportunities across stages, monitor conversion ratios, and forecast future sales performance accurately.
Territory Performance Reports	Review sales performance by territory, compare against targets, and identify regions needing attention or investment.
Gross Profit Report	Measure gross profit by item, invoice, or territory, factoring in costs to evaluate true profitability of sales.
Sales Target Variance	Compare actual sales against assigned targets by salesperson or territory to highlight achievements and gaps.
Forecast Reports	Project future sales based on historical data, pipeline activity, and seasonal trends to support better planning.



Global Footprint

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