Features of Trade Counter Accounting Software

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There are a large number of different features and options in our software, but we have tried to give you a general summary here of what it does. We are continually updating the software based on what our customers need, and the software can be used in many ways.

You may have some specific requirements that aren't listed here, or perhaps not explained in the way you are used to, so just get in touch and we will do our best to give you them information you need and make sure the software will be right for your business.

Some of the features may also be part of different add-on modules so it's worth checking on what you need.

> *"We run a trade counter with quick order processing. Customers bang stuff over the counter, get a receipt and leave. Benchmark makes it easy and very fast with only a few buttons to press."*
>
> *Paul Stoneman – Plumbcall*

Key features of the software

- Fast, easy-to-use point-of-sale
- Trade Account and Cash customers
- Multiple pricing and discount options
- On-screen Customer sales history
- Create quotes and convert to sales
- Print or email documents
- End-of-day sales reports
- Barcode scanning

- Purchase orders and goods in
- Sales order processing
- Flexible stock control
- Integrated card machines
- Full back end accounting package
- Can be linked to eBay or your website
- Interest free finance available
- No special hardware required

Speak to us

Why not give us a call for a no-nonsense chat about what you need and how we can help you.

> No tech speak.
> No hard sell.
> No flannel.

Just honest answers and straightforward advice.

i Telephone 01458 444010 or email enquiries@benchmark-software.co.uk

General Features
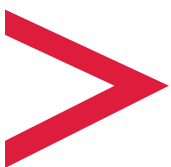
- Separate logins for Point of Sale and back-office accounts
- Multiple users can be created, each with their own access rights and restrictions
- Allows you to run more than one company
- Manual and automatic back-up programs give you maximum security of your data
- Software is easy to learn and use, saving training costs
- System can be modified to suit the way you work
- Custom invoice, statement and delivery note layouts
- Period-based accounting for greater flexibility on closing a month
- Multiple checks in the system ensure you don't do anything by accident.
- Unlimited support and online training
- Benchmark also builds website, which can be linked with stock and orders

Point of Sale (POS) Ledger

- No special POS hardware needed; just normal PCs and printers
- Print and email invoices, refunds, sales orders and quotes
- Sales order processing lets you create and amend and order for later delivery
- Cash and account customers
- Multiple pricing and discount options
- Create special prices and price breaks for customers
- Create customer accounts mid-sale
- Enter Customer References on each sale e.g. Job name
- Option to generate stock orders for items not in stock when finishing the sale
- Temporarily suspend a transaction mid-sale and recall it later
- Add non-stock and text lines to a sale or order
- View and amend prices, quantities and discounts during the sale
- Works with standard cash drawers, receipt printers, A4 printers and barcode scanners
- Raise refunds from existing invoices and receipts
- Convert quotes into invoices or sales orders
- Optional restocking fee when processing a refund
- Card machine integration to reduce errors and save time
- View and enter prices Including or Excluding VAT
- View price per 1000
- Quickly view margins when offering discounts or deals
- Margin protection against products to prevent stock being sold at a loss
- Take deposits against sales orders
- Barcode scanning with ability to add barcode to product mid-sale
- Multiple barcodes can be stored against a product
- User can be assigned to each sale for tracking or commission
- Ability to 'reserve' stock to a quote before it is converted to a sale or order
- E-signature pads allow you to check authorised signatories for an account
- Extensive product search function by category, description, code etc.
- Browse products within categories and sub-categories
- Add associated products to stock for alternative products, cross-selling, up-selling etc.
- Easy access to what customers had bought before and at what price, mid-sale
- Create and amend products during the sale
- Control over what functions users can access during a sale e.g. price changes or discounts
- Option to choose what documents are printed/emailed at the end of a sale
- End -of-Day reporting and summary of sales, orders and payments, with till reconciliation
- Add product images to view during the sale

Sales Ledger

- Ability to create credit limits based on value or time (e.g. over 60-days)
- Average payment days calculation
- Customers can be put on 'Stop'
- Add notes to customers that can be displayed during invoicing
- Print and/or email invoices or statements in bulk
- Add sales reps to a customer and calculate commission
- VAT Reports and returns including new legislation due April 2019
- Extensive sales reports including margins, sales, stock etc. with filters such as date and value
- Multiple delivery addresses against a customer, including site addresses
- Quickly view outstanding balances, previous invoices, statements and sales history
- Post money received and allocate to invoice or invoices
- Integration with ecommerce website using our Web Integration Module
- Returns module for tracking product returns, refunds/replacements
- Day Book listing provides summary of transactions

Purchase Ledger

- Includes Supplier Terms and average payment days
- Attach scanned supplier invoices to record
- VAT Reports
- Extensive purchase reports including creditors listing, statements and turnover
- Remittances posting and Remittance advice printing
- Easy posting of payments for multiple suppliers at once
- Easy access of outstanding balances including on-screen viewing of invoices
- Returns module for tracking product returns and refunds/replacements
- Day Book listing provides summary of transactions

Stock Control Ledger

- Multiple prices including Trade, Retail, Cost on each product based on amount or mark-up
- Stock levels on each product showing free, physical, allocated and ordered quantities
- Products can be sold even if not in stock
- Automatic Purchase Ordering based on product re-order levels
- Minimum stock level, re-order level and minimum order quantity against each product
- Multiple suppliers with prices, lead times and minimum order quantity
- Preferred supplier can be selected for auto-ordering
- Unit of quantity, weight, bin location and alternative product code
- Automatic splitting of boxed products into single items
- Bill-of-materials with calculated cost price
- User-defined product groups
- Multiple barcodes for each product
- Barcode printing program for single labels or batches
- Create and track purchase orders
- Post adjustments, issues, allocations, goods-in and returns
- Goods inwards program for posting stock against purchase orders
- Extensive stock reports including stock movement, sales and price lists
- Day book listing and control totals report providing stock audit trail
- Multi-location Stock add-on module for control of stock in multiple locations
- Ability to archive products not in stock and not sold recently to hide from stock searches
- Bulk price updating based on increase of percentage from suppliers

Nominal Ledger

- Ability to produce a full set of accounts for your point-of-sale and accounting.
- Manage business expenses and produce management accounts.
- Cash payments, Cash receipts and Journal posting to Nominal Ledger Accounts
- Trial Balance and Financial statements (Profit & Loss and Balance Sheet) reports available
- Day book listing provide Nominal Ledger audit trail
- VAT Reports, Returns and new 'Making Tax Digital' legislation from April 2019
- Have multiple bank accounts and post payments to them
- Easy to use Bank reconciliation to compare physical and computer bank balances
- Set up nominal accounts so you can record different types of sales and business expenses

Sales Order Processing (SOP) Module

- Creation of sales orders to allocate stock, deliver it and then invoice
- Create quotes and convert them into orders
- Orders can be created at point-of-sale or back office
- Multiple delivery dates and ability to view status and schedules
- Orders can be created when insufficient stock or negative stock levels exist
- Different allocation methods available for greater control over fulfilling orders
- Stock can be allocated and delivered to each order manually or to multiple based on due date.
- Option to produce order acknowledgements, delivery notes and picking lists
- Delivered stock can be invoiced by line or whole order
- Multiple orders can be consolidated to one delivery note and invoice
- Delivery adjustments can be made
- Extensive order reporting with filters
- Detailed order screen for complete control
- View or hide margins for each line and total order
- Generate purchase orders directly from an order
- Replicate orders from previous ones
- Ability to specify whether stock is to be collected, delivered or drop-shipped from the supplier
- Can be integrated with ecommerce websites, eBay and Amazon

Purchase Order Processing (POP) Module

- Advanced purchase order system for greater control
- Detailed view of orders with status and schedules
- Purchase orders can be created manually, or automatically based on minimum stock levels
- Option to select supplier based on price or lead time
- Book goods inwards for each order separately or for multiple orders
- Easy adjustment of received quantities against order
- Ability to raise a purchase order from an existing sales order
- Manual or automatic purchase invoice production of received lines or whole order
- Option to consolidate orders for one supplier onto one purchase invoice
- Reports for orders, suppliers and products with filtering by date, supplier etc.
- Report on supplier efficiency using the supplier turnaround report
- Option to delete completed orders up to a specified date

Website Development

- Simple brochure site or full ecommerce site
- Logo design, content and search engine optimisation
- Domain name registration, hosting, support and training all included
- Unlimited products and categories with images
- Google Adwords and Shopping accounts created and managed
- Stock levels and prices can be uploaded from accounting system to website
- Orders can be downloaded from website to accounting system