

# Field Sales Order Taking

Turning Customer Visits into Accurate Orders—Anywhere, anytime

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## What Is Field Sales Order Taking?

**Field Sales Order Taking** is the process where **sales representatives capture customer orders while working outside the office**, typically during on-site visits to retailers, distributors, or clients.

Using **mobile devices (smartphones or tablets)**, sales reps can place orders **in real time**, directly into the company's Warehouse Management Solution or ERP system.

It replaces **manual order forms, phone calls, and delayed data entry** with a fast, accurate, and digital workflow.

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## How It Works

- 1. Sales Rep Visits Customer**
    - Retail shop, outlets, warehouses, or customer site
  - 2. Order Entered on Mobile App**
    - Select products, quantities, prices, and promotions
  - 3. Instant Validation**
    - Stock availability, pricing rules, credit limits
  - 4. Order Submitted in Real Time**
    - Synced with AGen, inventory, or order management system
  - 5. Order Fulfillment Begins**
    - Warehouse, delivery, and invoicing triggered automatically
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# Field Sales Order Taking

## Key Features

### ✔ Mobile Order Entry

Capture orders directly on-site using smartphones or tablets

### ✔ Real-Time Inventory & Pricing

Ensure accurate stock levels, promotions, and customer-specific pricing

### ✔ Customer & Product Catalog Access

View customer history, past orders, and full product listings instantly

### ✔ Offline Mode

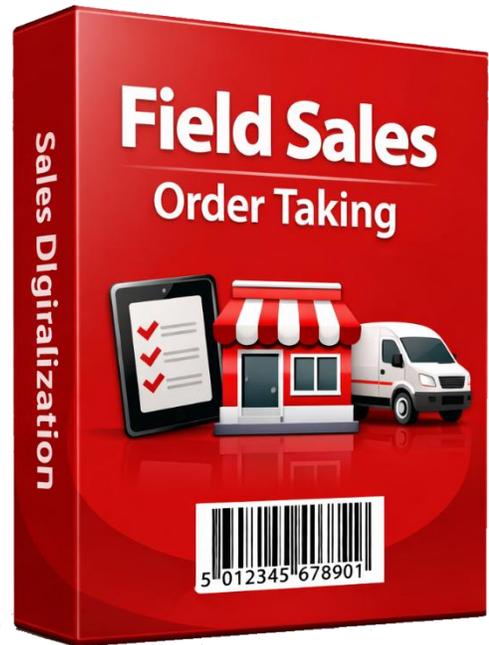
Take orders even without internet—sync automatically when online

### ✔ Digital Signatures & Notes

Confirm orders on the spot and record special instructions

### ✔ Instant Order Confirmation

Customers receive quick confirmation, reducing disputes



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## Who Uses Field Sales Order Taking?

- 📦 **FMCG & Consumer Goods Companies**
  - 🚚 **Distributors & Wholesalers**
  - 💊 **Pharmaceutical & Medical Sales**
  - 🏭 **Industrial Supplies**
  - 🍷 **Food & Beverage Suppliers**
  - 🛠️ **Spare Parts & Equipment Vendors**
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# Field Sales Order Taking

## Business Benefits

### **Faster Order Processing**

No paperwork, no delays—orders flow instantly to fulfillment

### **Higher Sales Productivity**

Sales reps spend more time selling, less time on admin

### **Improved Order Accuracy**

Eliminates manual transcription errors

### **Better Sales Visibility**

Managers get real-time sales data and performance insights

### **Improved Customer Experience**

Quick, professional, and transparent ordering process

### **Increased Revenue Opportunities**

Upselling and cross-selling with live product recommendations



## Traditional vs. Field Sales Order Taking

Traditional Method	Field Sales Order Taking
Paper order forms	Mobile digital orders
Manual data entry	Automatic system sync
Delayed processing	Real-time submission
Limited visibility	Live sales insights

## Why Modern Businesses Choose It

In today's fast-moving markets, businesses need **speed, accuracy, and visibility**. Field Sales Order Taking helps organizations **close deals on the spot**, reduce operational friction, and respond faster to customer needs.