Acumatica
The Cloud ERP

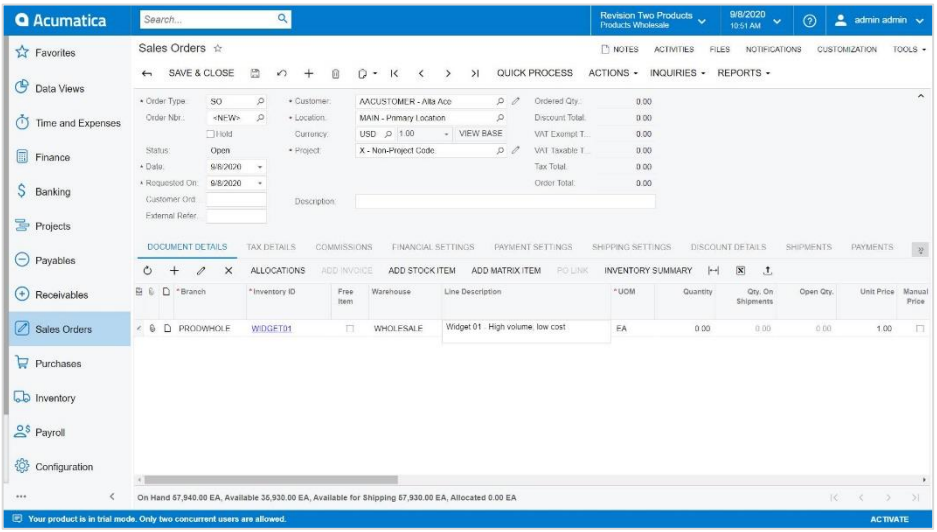
Sales Order Management

Improve Ordering, Fulfillment, and Delivery Processes

Centrally manage sales activities such as entering quotes, fulfilling sales orders, creating shipments, tracking prices, applying discounts, and checking available inventory. Give your sales and service departments real-time data to improve their customer service.

AUTOMATE SALES ACTIVITIES FOR BETTER CUSTOMER SERVICE

- **Integrated Workflow.** Automate order processing and eliminate unnecessary steps with Acumatica integrated workflow. Configure order status, status changes, actions, notifications, and alerts to automatically trigger during order processing, even allowing users to process an order in one click. Automatically check for unique customer order numbers and manage duplicates.
- **Flexible Discounts and Promotions.** Manage complex customer and vendor pricing and discount policies. Set up quantity and volume discounts as a percent or an amount. Specify multiple discount rules and sequences or allow the system to automatically apply the best discount combination. Maintain discounts in single and multiple currencies. Establish rules and policies for price overrides.
- **Configurable Order Types.** Predefine order types tied to specific order processing requirements. Specify inventory allocation rules, workflow scenarios, and the documents generated in Accounts Receivable and Inventory Management.
- **Multiple Entry Points**. Create orders from sales order entry, import files, or convert quotes to sales orders. Integration with EDI, commerce, and retail point of sale systems are supported through Open APIs.
- **Special Orders**. Link purchase orders or drop-shipments directly to sales orders.



Build sales orders from customized templates that specify workflow, shipping, inventory, priority, invoicing, and backorder options

KEY BENEFITS

IMPROVE CUSTOMER SERVICE

- Provide real-time access to available inventory, order status, shipment information, and current pricing
- Create and fulfill orders accurately
- Email order confirmations to customers or setup automated email notifications for document transmittal

MAXIMIZE DISCOUNTS WITH FLEXIBLE SCHEDULING

- Place large orders for best pricing
- Have goods shipped in smaller increments to match production times
- Control deliveries with shipping dates and backorder options

IMPROVE EFFICIENCY

- Manage sales order flows using predefined processes or by configuring a process to match your current workflow
- Use table and matrix views to streamline sales order entry for product families.
- Specify different order processes for each customer or each sales order.

ACCELERATE DECISION-MAKING

- Improve purchasing decisions by using drill-down reports and dashboards to access past information and gain insights into future needs
- Create dashboards to monitor sales activities and key performance indicators (KPIs)

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SALES ORDER MANAGEMENT FEATURES AND CAPABILITIES

System-Wide Integration	Sales Order Management integrates with Customer Relationship Management, Inventory Management, Requisition Management, Purchase Order Management, Accounts Receivable, Production Management, and Field Service Management.
Inventory Allocation	Configure the inventory allocation rules for each step of the sales process. Create warnings when inventory is over-allocated or unavailable.
Invoice Consolidation	Consolidate multiple shipment orders onto a single invoice—automatically or manually. Optionally update price and discount detail on review before invoice printing and updating accounts receivable.
PO Linking	Link sales orders with purchase orders—allocate received items to orders. Generate purchase orders automatically or link them manually. Auto-hold sales orders until receiving a purchase order. Sales Order Management also supports drop shipment.
Real-Time Inventory	Get real-time inventory data, including allocated inventory. During the entry of a sales order, Acumatica will notify the user if the quantity is not available or is over-allocated.
Returns Management	Return Merchandise Authorization (RMA) features allow you to receive goods from customers. RMA orders can be processed as a credit to a customer balance or as a replacement for damaged goods. Every line can be marked with a reason code to specify the return reason.
Multiple and Partial Fulfillment	Fill orders from more than one warehouse. Split a sales order into multiple shipments from different warehouses based on availability and costs. Track partial ship order balance and manage backorders.
Shipment Schedules	Specify a different delivery date for each line item on a sales order. Generate shipment orders according to the delivery schedule and item availability. Restrict shipments for on-hold orders.
Pick Lists and Replenishment	Generate pick lists according to item availability and the pick priority for each warehouse location. Auto-search other warehouses, issue replenishment orders, and place the sales order on hold until the replenishment arrives.
Credit Limit Verification	Before releasing a sales order, Acumatica verifies the customer's credit limit. Orders placed on credit hold are automatically released if a customer payment is entered or if the order amount is decreased. Authorized users can override the credit hold status and force order fulfillment.
Custom Workflows	Use workflows to automate and modify the quote to sales order conversion process, updates to sales order status, returns and replacement process, or pick, pack, and ship processes.

ABOUT ACUMATICA

Acumatica Cloud ERP provides the best business management solution for digitally resilient companies. Built for mobile and telework scenarios and easily integrated with the collaboration tools of your choice, Acumatica delivers flexibility, efficiency, and continuity of operations to growing small and midmarket organizations. **Business Resilience. Delivered**.

Contact us today to get started: 281-652-5947 | accountingbusinesssolutions.com

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