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 customer service with AI-powered item substitution, up-sell, and cross-sell suggestions.

AUTOMATE SALES ACTIVITIES FOR BETTER CUSTOMER SERVICE

- **Order Suggestions**. Boost sales with item substitution, up-sell, and cross-sell suggestions powered by artificial intelligence with machine learning.

- **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 apply the best discount combination automatically. 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.

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 set up automated email notifications for document transmittal

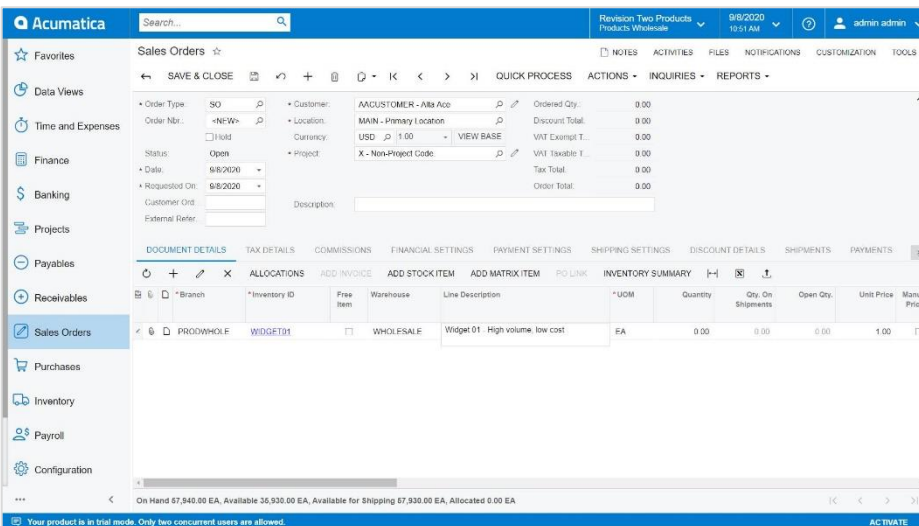#### MAXIMIZE DISCOUNTS WITH FLEXIBLE SCHEDULING

- 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)

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

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 purchase orders.
Real-Time Inventory	Get real-time inventory data, including allocated inventory. During a sales order entry, 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 or as a replacement for damaged goods with reason codes.
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 based on item availability and the pick priority for warehouse locations. Auto-search warehouses, issue replenishment orders, and place the order on hold until the goods arrive.
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 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, and pick, pack, and ship processes.
Cross-Company Transactions	Streamline cross-company buy-sell transactions by automatically creating a sales order in one company from a purchase order in another company. Cross-company transactions generate the purchase receipt in the buying company from the shipment in the selling entity and create the sales invoice in the selling company when the bill is created in the buying company.
Item Suggestions	Boost sales and improve customer satisfaction by configuring item substitution, up-sell, and cross-sell suggestions manually or use artificial intelligence with machine learning to suggest items based on pricing rules, sales history, and other parameters. Customers will love the ability to discover better products and complimentary items they never purchased before. Up-sell and cross-sell features are available for sales orders, quotes, and online storefront orders.

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**.
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