Sales Order Management

Streamline ordering, fulfillment, and delivery processes by empowering sales with real-time data to improve customer service.

- Suggested item substitutions, up-sell, and AI-powered cross-sell recommendations
- Inventory allocation for customer orders
- Flexible pricing and discounting strategies
- Purchase order linking and drop shipments

Key business benefits

- Provide real-time access to inventory, order status, shipment information, and current pricing.
- Create and fulfill orders accurately.
- Control deliveries with shipping dates and backorder options.
- Use table and matrix views to streamline sales order entry for product families.
- Create dashboards to monitor sales activities and metrics.

Related resources

- Perfecting Quote-to-Cash with Acumatica > LEARN MORE
- Resilient Sales Strategies > LEARN MORE
- Schedule a Personalized Demo > LEARN MORE

Improve Order, Fulfillment, and Delivery Processes for Happier Customers

Centrally manage sales activities for quote entry, order fulfillment, shipment creation, pricing and discounting, and inventory stock status. Empower sales and service departments with real-time data to improve customer service.

AUTOMATE SALES ACTIVITIES FOR BETTER CUSTOMER SERVICE

- **Order Suggestions.** Boost sales with item substitution, up-sell, and AI-powered cross-sell suggestions.
- **Integrated Workflow.** Automate and customize order processing by order type, eliminating unnecessary steps with integrated workflows. Configure order status, status changes, actions, notifications, and alerts to trigger during order processing.
- **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 automatically allow the system to apply the best discount combination.
- **Configurable Order Types.** Predefine order types tied to specific order processing requirements. Specify inventory allocation rules, workflow scenarios, and 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. Open APIs support integration with EDI, commerce, and retail point-of-sale systems.

"The quote to cash cycle is the lifeblood of our business, and Acumatica has given us the tools to manage it effectively and efficiently every step of the way. We have valuable tools to see what's coming, to do all our forecasting through dashboards, and focus on key customers."

–Tim Patton, ICT Director, SAM

> CUSTOMER STORIES

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

Set inventory allocation rules with warnings for over-allocated or unavailable items. Use the Manage Sales Allocations screen to streamline stock allocation, prioritize orders, and automate processes, with manual overrides available for adjustments.

Invoice Consolidation

Consolidate multiple shipment orders onto a single invoice. Optionally update price and discount details 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, or create drop-ship purchase orders from vendors directly to customer locations from sales order entry.

Manage Pricing and Discounts

Manage complex pricing and discount policies, protecting margins by optionally excluding automatic line discounts, such as volume discounts, from order lines for a particular price, such as promotional pricing.

Returns Management

Return Merchandise Authorization (RMA) features allow you to receive goods from customers. RMA orders can be processed as a credit or replacement for damaged goods with reason codes.

Cross-Company Transactions

Streamline cross-company 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. Fulfill orders faster with intercompany drop-ship and returns.

Blanket Sales Orders

Generate releases from blanket sales order contracts with pre-defined order quantities, dates, and ship-to locations.

Credit Limit Verification

Acumatica checks customer credit limits before releasing sales orders. Credit holds lift automatically with payments or reduced order amounts, while authorized users can override holds.

Item Suggestions

Boost sales with item substitution, up-sell, and AI-powered cross-sell suggestions during sales order and quote entry. Up-sell and cross-sell features are also available for online orders.

Shipment Schedules

Specify delivery dates 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.

Order Orchestration

Automated Order Orchestration streamlines warehouse selection for fulfillment by utilizing configurable business rules, thereby eliminating the need for manual searches and overrides. This enables faster, more accurate order fulfillment.

Multiple and Partial Fulfillment

Fill orders from multiple warehouses. Split a sales order into multiple shipments from different warehouses based on availability and costs. Track partial ship order balance and manage backorders.

Counter Sales / Mixed Orders

Process sales and returns on a single sales order to streamline walk-in warehouse counter sales and returns, where customers may buy and return products at the same time.

Pick Lists and Replenishment

Generate pick lists based on item availability and warehouse location pick priority. Auto-search warehouses, issue replenishment orders, and place orders on hold until the goods arrive.

Margin Visibility

Improve profitability by reviewing estimated margin percentages and amounts during order creation for the entire order and individual line items, providing transparency to boost profits.

Custom Workflows

Utilize custom workflows by order type to automate and modify the quote-to-sales order conversion process, update sales order status, manage return and replacement processes, and streamline pick, pack, and ship processes.

Role-Based Dashboards

Stay on top of your business with role-based dashboards for sales managers and shipping clerks.

Side Panels

Side panels provide users with direct access to customers, items, and order details for sales orders, shipments, invoices, and other relevant information.

Sales Tax Exemption Certificates

Comply with sales tax nexus laws with Exemption Certificate Management from Avalara to collect and manage customer exemption certificates for healthcare providers, government organizations, higher education institutions, non-profits, and qualifying manufacturing product sales.

Optional Shipping Integration

Streamline small parcel and LTL shipping workflows with Acumatica's native Pacejet integration, enabling automated processes and expanded carrier services. Configure packing and shipping scenarios while gaining transparency into shipment data, including hazardous materials, PRO bill numbers, delivery instructions, accessorial definitions, non-standard containers, and serialized shipping container codes (SSCC).

Package Weights

Capture packaging weights from scales via Device Hub during shipment preparation or rate shopping activities.