



# 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.
- **Flexible Discounts and Promotions.** Manage complex 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 scenario, and the documents that will be generated in the Accounts Receivable and Inventory Management modules.

« Sales Orders ☆ Notify Note Attach file Activity

Actions
Inquiries
Reports

\* Order Type: SO \* Customer: SO00004D3 - SO customer #4D3 Ordered Qty.: 8.00  
 Order Nbr.: 000580 \* Location: MAIN - Primary Location VAT Exempt Tot... 0.00  
 Status: Open  Credit Hold VAT Taxable To... 0.00  
 Hold \* Project: X - Non-Project Code. Tax Total: 0.00  
 \* Date: 3/3/2009 Order Total: 1,128.00  
 \* Requested On: 3/3/2009 Description: SO004-04-06  
 Customer Order: SO004-04-06  
 Customer Ref:

Document Details | Tax Details | Commissions | Financial Settings | Payment Settings | Shipping Settings | Discount Details | Shipments | Payments | Totals

Bin/Lot/Serial	Add Invoice	Add Item	PO Link	Inventory Summary						
* Branch	* Inventory ID	Free Item	* Warehouse	* UOM	Unit Cost	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Discount
MAIN	SO00004D1	<input type="checkbox"/>	RETAIL	PC	10.0000	1.00	0.00	1.00	20.0000	0.000000
MAIN	SO00004D2	<input type="checkbox"/>	RETAIL	BOX	100.0000	1.00	0.00	1.00	200.0000	0.000000
MAIN	SO00004D3	<input type="checkbox"/>	RETAIL	PC	10.0000	1.00	0.00	1.00	16.0000	0.000000
MAIN	SO00004D4	<input type="checkbox"/>	RETAIL	CARTON	100.0000	1.00	0.00	1.00	160.0000	0.000000
MAIN	SO00004D5	<input type="checkbox"/>	RETAIL	PC	5.0000	1.00	0.00	1.00	20.0000	0.000000
MAIN	SO00004D6	<input type="checkbox"/>	RETAIL	CARTON	100.0000	1.00	0.00	1.00	400.0000	0.000000
MAIN	SO000NS4D7	<input type="checkbox"/>	RETAIL	PC	0.0000	1.00	0.00	1.00	24.0000	0.000000
MAIN	SO000NS4D8	<input type="checkbox"/>	RETAIL	CARTON	0.0000	1.00	0.00	1.00	288.0000	0.000000

*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

### MAXIMIZE DISCOUNTS WITH FLEXIBLE SCHEDULING

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

### IMPROVE OPERATIONAL EFFICIENCIES

- Manage sales order flows using predefined processes or by configuring a process to match your current workflow
- Specify different order processes for each customer or order

### ACCELERATE DECISION-MAKING

- Improve purchasing decisions by using drill-down reports and dashboards to access past information and gain insights into future needs



### SALES ORDER MANAGEMENT FEATURES AND CAPABILITIES

<b>CRM Integration</b>	Convert CRM opportunities into sales orders without re-entering pricing and discount information. Easily locate customer orders to verify delivery status. Associate tasks and activity history with each order.
<b>Inventory Allocation</b>	Configure the inventory allocation rules for each step of the sales process. Warn the user when inventory is over-allocated or unavailable.
<b>Invoice Consolidation</b>	Consolidate multiple shipment orders onto a single invoice—automatically or manually. Optionally update price and discount information on review before printing the invoice and updating accounts receivable.
<b>Purchasing Integration</b>	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.
<b>Real-Time Inventory</b>	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.
<b>RMA with Reason Codes</b>	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 of damaged goods. Every line can be marked with a reason code to specify the return reason.
<b>Multiple and Partial Fulfillment</b>	Fill a sales order 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 back order delivery.
<b>Shipment Schedules</b>	Specify a different delivery date for each line item on a sales order. Generate shipment orders according to delivery schedule and item availability.
<b>Pick Lists and Replenishment Orders</b>	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.
<b>Credit Limit Verification</b>	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.

### THE ACUMATICA ERP DIFFERENCE

Acumatica delivers a full suite of integrated business management applications unlike any other ERP solution on the market today.

#### STREAMLINE OPERATIONS

**Manage your business more efficiently:**

- Automate processes
- Control workflows
- Access the system from anywhere on any device—including mobile
- Promote collaboration with all-inclusive user licensing

#### ADAPTABLE SOLUTION

**Add and extend:**

- Deploy in-house or in a private or public cloud
- Easily configure your solution to fit your needs
- Add capabilities such as CRM or data visualization at any time
- Extend to other solutions and applications beyond ERP

#### YOUR BUSINESS ACCELERATED

**Get a single version of the truth:**

- Accelerate business performance and make smarter decisions with automated processes, real-time data collection, financial analyses, and forecasting
- No per user pricing – system scales as your business grows