Centrally Manage Sales Activities, Streamline Procurement Processes, and Automate the Way You Fulfill Orders for Internal or External Clients

Service, construction, professional service, non-profit, and commerce-driven marketing companies that do not carry stock inventory use Acumatica Order Management as an alternative to Acumatica Distribution Suite to manage sales of services and non-stock inventory. This integrated suite provides better customer service tools, improves vendor relationships, receives non-stock inventory, and eliminates paperwork while providing all stakeholders with greater visibility into order management processes. When purchased with Inventory Management, Acumatica Order Management includes Sales Order Management, Purchase Order Management, and Requisition Management with inventory-centric features.

KEY FEATURES OF ORDER MANAGEMENT

- **Sales order management.** Order processing software from Acumatica lets you manage sales activities centrally. You can enter quotes, fulfill sales orders, track prices, apply discounts, and check available inventory.
- **Credit limit verification.** Check credit automatically during order processing (before release). Auto-release a credit hold when a payment is entered or an order amount is decreased. Manual hold override is available to authorized users.
- **Purchasing integration.** Link sales orders with purchase orders and allocate received items to orders. Automatically generate purchase orders or create manual links. Auto-hold sales orders until you receive a purchase order.
- **Vendor bidding.** Eliminate paperwork and speed the bidding process by emailing requests to multiple vendors. Make the purchase with a single vendor or select multiple vendors for different products on the request.
- **CRM integration.** Convert CRM opportunities into sales orders without re-entering pricing and discount information. Quickly locate customer orders to verify delivery status. Associate tasks and activity history with each order.

Centrally manage sales activities, streamline procurement processes, and automate order fulfillment for internal or external clients

KEY BENEFITS

KNOW YOUR TRUE COSTS

- Determine profitability by product line, location, or business unit
- Use real-time information to control costs across the entire supply and distribution chain

REDUCE ORDER TIMES

- Eliminate delays through automated sales order processing and shipping order generation
- Set rules to manage returns, credit limits, and more

SIMPLIFY PRICING AND DISCOUNTS

- Set up quantity and volume discounts as a percent or amount
- Specify multiple discount rules and sequences or allow the system to apply the best discount combination automatically
- Maintain discounts in single or multiple currencies
- Establish pricing rules and policies.

SAVE TIME WITH AUTOMATION

- Generate purchase orders automatically or turn an approved quote into a sales order with one click

ORDER MANAGEMENT FEATURES AND CAPABILITIES

Automated Requisitioning	Automate the entire requisitioning process, including collecting orders, collecting supplier bids, sending and approving quotes, issuing purchase orders, and receiving goods. Authorize users to select from your catalog, limit requests to specific goods, or enter descriptions.
Landed Cost Functionality	Include additional shipping and handling costs with purchased goods. Allocate costs using custom allocation methods. Directly enter landed cost bills in Accounts Payable and associate them with received goods.
Multilevel Approval	Create approval rules for order types, vendor information, order amount, and other order-specific information. Control release through a preset approval process.
Vendor Selection and Performance Analysis	Upload vendor price lists with product descriptions, prices, and delivery times. Update costs, quantities, and lead times each time you receive goods. Retain statistical information on vendor performance.
Invoice Consolidation	Consolidate multiple shipment orders onto a single invoice— automatically or manually. Update price and discount information on review before printing the invoice and updating accounts receivable.
Reporting and Drill-Down	Analyze and manage your purchasing experience through a complete set of inquiry screens and auditing reports with drill down to the original transactions.
Collect and Organize Requests	Bundle requests from multiple sources in a single requisition. Create approval rules based on quantity, request amount, and more.
Sales Order Integration	Turn an approved quote into a sales order with one click. Sales orders are managed by the rules within the sales order module and linked to the requisition for easy access.
Audit Trail	Automatically create a complete audit trail of all transactions, including IDs of users who entered and approved the transactions or modified the records. Optional notes and attached electronic documents remain with the activity records.
Integrated Workflow	Automate order processing and eliminate unnecessary steps. Configure order status, status changes, actions, notifications, and alerts to trigger automatically during order processing.
Non-Stock Receipt and Returns	Process receipt of goods and returns for non-stock items without the Inventory Management application.

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: 877-979-5462 | info@swktech.com