Sales Order Management

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

- Suggested item replacement, up-sell, and cross-sell
- 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 cross-sell suggestions.

- **Integrated Workflow.** Automate and customize order processing by order type and eliminate 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

Configure inventory allocation rules for each step of the sales process with warnings for over-allocated or unavailable items. Streamline mass stock allocation and deallocation for orders with the Manage Sales Allocations screen. View customer and order priorities for unallocated orders sorted by date to allocate inventory that is available for allocation. Manual overrides can be used to change or refine the order allocation suggestions where needed. The allocation process may be automated.

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 and protect 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.

Blanket Sales Orders

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

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.

Item Suggestions

Boost sales with defined item substitution, up-sell, and 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.

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.

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 percent and amount calculations during order creation for an entire order and individual line items providing transparency to boost profits.

Custom Workflows

Use custom workflows by order type to automate and modify the quote to sales order conversion process, update sales order status, return and replacement process, and 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

Distribution side panels provide users with direct access to customers, items, and order details for sales orders, shipments, invoices, and more.

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 shipment processing workflows and configure packing and shipping scenarios with Acumatica and 3G Pacejet. The enhanced integration of these shipping and processing capabilities, now in the core of the Acumatica solution, provides transparency for shipment data, including hazardous materials, PRO bill number, delivery instructions, accessorial definitions, non-standard containers, serialized shipping container codes (SSCC), and other packaging and shipment information with no need for separate customization.

Package Weights

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