Acumatica
The Cloud ERP

ORDER MANAGEMENT

CENTRALLY MANAGE SALES ACTIVITIES, STREAMLINE PROCUREMENT PROCESSES, AND AUTOMATE THE WAY YOU FULFILL ORDERS FOR INTERNAL OR EXTERNAL CLIENTS

Companies that don't carry an inventory can use Acumatica Order Management as an alternative to Acumatica Distribution Management. This integrated suite gives you the tools to deliver better customer service, improve vendor relationships, and eliminate paperwork while providing all stakeholders with greater visibility into order management processes.

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 (prior to 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. Easily 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 automatically apply the best discount combination
- Maintain discounts in single or multiple currencies
- Establish rules and policies for price overrides

SAVE TIME WITH AUTOMATION
- Generate purchase orders automatically, or turn an approved quote into a sales order with one click

Acumatica
The Cloud ERP

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.

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