Acumatica
THE CLOUD ERP

DATA SHEET

SALES ORDER MANAGEMENT

Improve ordering, fulfillment, and delivery processes by giving sales and service personnel real-time data so your customers order more often and receive better service.

The Sales Order Management (SO) module allows you to centrally manage sales activities such as entering quotes, fulfilling sales orders, creating shipments, tracking prices, applying discounts, and viewing available inventory.

KEY BENEFITS

WORK FROM ANYWHERE

Create, approve, and fulfill sales orders from anywhere using any popular web-browser.

IMPROVE CUSTOMER SERVICE

Provide real-time access to available inventory, order status, shipment information, and current pricing so orders are created and fulfilled both timely and accurately.

FLEXIBLE SCHEDULING TO MAXIMIZE DISCOUNTS

Place large orders for best pricing and have goods shipped in smaller increments to match production times. Unlimited shipping dates and backorder options provide control over delivery.

IMPROVE OPERATIONAL EFFICIENCIES

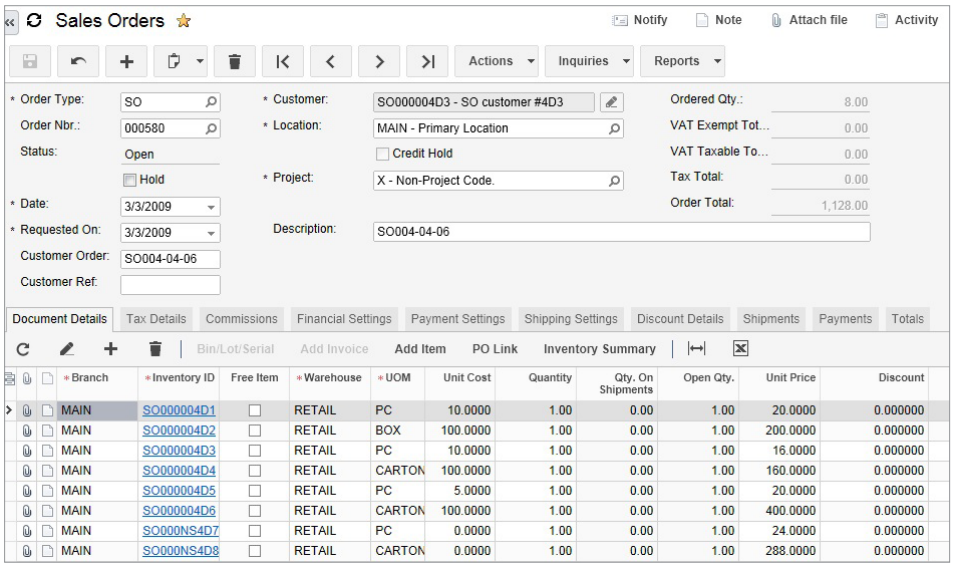
Manage sales order flows using predefined processes or by configuring a process to match your current workflow. Specify different order processes for each customer or order.

ACCELERATE DECISION-MAKING

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

KEY FEATURES

Integrated workflow	Automate order processing and eliminate unnecessary steps by configuring order statuses, status transitions, notifications, alerts, and actions that should be automatically triggered during order processing.
Flexible discounts and promotions	Manage complex pricing and discount policies with the ability to set up quantity and volume discounts as a discount percent or an absolute discount amount. In cases where multiple discounts apply, you can specify the rules and sequences for applying discounts. Establish policies for price overrides.
Comprehensive order types	Select from pre-configured order types or define custom types to match your existing business process. Use web menus to define processes for cash sales, converting quotes, phone orders, credit memos, and more.



Branch	Inventory ID	Free Item	Warehouse	UOM	Unit Cost	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Discount
MAIN	SO000004D1		RETAIL	PC	10.0000	1.00	0.00	1.00	20.0000	0.000000
MAIN	SO000004D2		RETAIL	BOX	100.0000	1.00	0.00	1.00	200.0000	0.000000
MAIN	SO000004D3		RETAIL	PC	10.0000	1.00	0.00	1.00	16.0000	0.000000
MAIN	SO000004D4		RETAIL	CARTON	100.0000	1.00	0.00	1.00	160.0000	0.000000
MAIN	SO000004D5		RETAIL	PC	5.0000	1.00	0.00	1.00	20.0000	0.000000
MAIN	SO000004D6		RETAIL	CARTON	100.0000	1.00	0.00	1.00	400.0000	0.000000
MAIN	SO000NS4D7		RETAIL	PC	0.0000	1.00	0.00	1.00	24.0000	0.000000
MAIN	SO000NS4D8		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.

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ADDITIONAL FEATURES AND BENEFITS OF ACUMATICA SALES ORDER MANAGEMENT

FEATURE	DESCRIPTION
Automated shipments	Fulfill large volumes of shipments using pre-defined packing rules for specific products. Acumatica can automatically determine packaging, generate labels, and confirm shipments for multiple orders with just a few clicks.
UPS, FedEx, and USPS integration	Get up-to-date freight costs for each shipment your company handles, print the actual carrier labels, and track shipments using actual tracking numbers provided by the carrier.
Carrier return label support	Print carrier return labels to include in order shipments for easy customer returns.
Purchasing integration	Link sales orders with purchase orders so received items can be allocated to orders. Orders can automatically generate purchase orders or be linked manually. Sales orders which are linked to purchase orders can be placed on hold until the purchase order is received. Drop shipment purchase order functionality is also supported.
Real-time inventory	Get real-time inventory data, including information about inventory that has been allocated. During the entry of a sales order, Acumatica will notify the user if the quantity is not available or over allocated.
Multiple and partial fulfillment	Fill sales orders with goods from more than one warehouse and specify if partial deliveries are acceptable. Based on warehouse availability and costs, Acumatica can split a sales order into multiple shipments from different warehouses. For incomplete orders, Acumatica will track the remaining sales order balance and manage back order delivery if required.
Shipment schedules	Specify a different delivery date for each line item on a sales order. For orders of this type, Acumatica will generate shipment orders according to the delivery schedule and item availability.
Pick lists and replenishment orders	Acumatica prepares a pick list according to item availability and the pick priority for each warehouse location. If a pick location has insufficient stock to fill an order, Acumatica will search for a warehouse with quantity on hand, issue a replenishment order, and place the sales order on hold until the replenishment is fulfilled.
Credit limit verification	Prior to 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.
RMA with reason codes	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.

IMPLEMENT YOUR FINANCIALS ON CLOUD TECHNOLOGY TO ACHIEVE COST SAVINGS AND FUTURE FLEXIBILITY

Adaptable ERP Software

BRING YOUR OWN DEVICE

Acumatica allows you to work from anywhere using your choice of device. Now with an interface that is tablet-friendly and optimized for mobile devices, you can work on a PC, Mac, iPad, or any other device with a browser.

SCALE AND GROW

Acumatica is Cloud-based so you can add capacity quickly. Since there are no user-based fees, you can add users in seconds.

DEPLOY ACCORDING TO YOUR NEEDS

Get Acumatica as a subscription (SaaS) or purchase the license. Deploy on-premises, on a hosted server, or on a Cloud platform.

YOU OWN YOUR DATA

So you can access it any time.

ADAPT AND INNOVATE

You get access to code and web development tools so you can adapt Acumatica to your existing processes.

On-the-Ground Support

Acumatica is sold through a global network of value added resellers (VARs) who provide business planning, implementation, customization, local support, and other services.

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