

## 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.

### 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

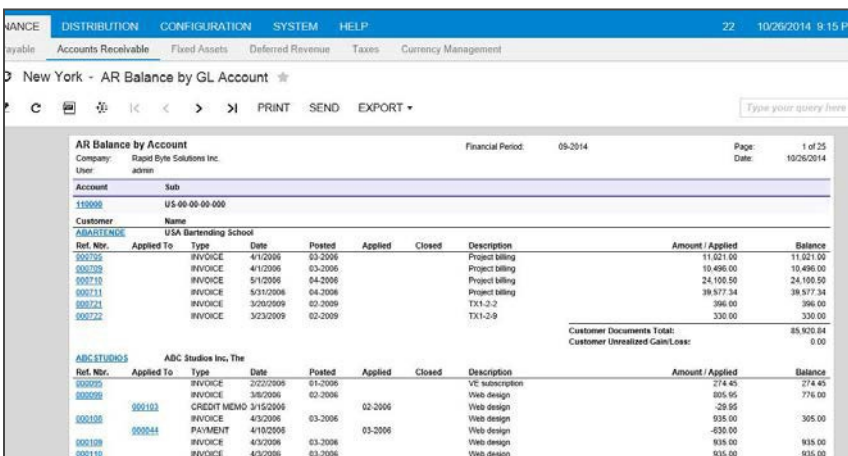
- Eliminate delays through automated sales order processing and shipping order generation
- Set rules to manage returns, credit limits, and more

#### 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



The screenshot shows the 'AR Balance by GL Account' report in Acumatica. The report is for 'New York - AR Balance by GL Account' and is dated 10/26/2014. It displays a list of accounts receivable balances, including company, user, account, sub, customer, and various financial details like date, posted, applied, closed, description, amount, and balance.

Ref. Nbr.	Applied To	Type	Date	Posted	Applied	Closed	Description	Amount / Applied	Balance
000255	INVOICE	4/1/2009	03-2009				Project billing	11,021.00	11,021.00
000209	INVOICE	4/1/2009	03-2009				Project billing	10,496.00	10,496.00
000710	INVOICE	5/1/2009	04-2009				Project billing	24,100.50	24,100.50
000211	INVOICE	5/31/2008	04-2008				Project billing	39,577.34	39,577.34
000221	INVOICE	3/20/2009	02-2009				TX1-2-2	396.00	396.00
000722	INVOICE	3/23/2009	02-2009				TX1-2-9	330.00	330.00
Customer Documents Total:								85,920.84	
Customer Unreversed Canceled:								0.00	

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

## ORDER MANAGEMENT FEATURES AND CAPABILITIES

<b>Automated Requisitioning</b>	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.
<b>Landed Cost Functionality</b>	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.
<b>Multilevel Approval</b>	Create approval rules for order types, vendor information, order amount, and other order-specific information. Control release through a preset approval process.
<b>Vendor Selection and Performance Analysis</b>	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.
<b>Invoice Consolidation</b>	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.
<b>Reporting and Drill-Down</b>	Analyze and manage your purchasing experience through a complete set of inquiry screens and auditing reports with drill down to the original transactions.
<b>Collect and Organize Requests</b>	Bundle requests from multiple sources in a single requisition. Create approval rules based on quantity, request amount, and more.
<b>Sales Order Integration</b>	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.
<b>Audit Trail</b>	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.
<b>Integrated Workflow</b>	Automate order processing and eliminate unnecessary steps. Configure order status, status changes, actions, notifications, and alerts to trigger automatically during order processing.

### ABOUT ACUMATICA

Acumatica is the world's fastest growing provider of cloud ERP, with the industry's highest customer satisfaction rating trusted by companies across diverse industries. Acumatica is easy-to-use, full-featured and mobile software. With unlimited users, everyone can have a real-time view of your business anytime, anywhere.

Contact us today to get started: [800-818-0574](tel:800-818-0574) | [www.dynamictechservices.com](http://www.dynamictechservices.com)

