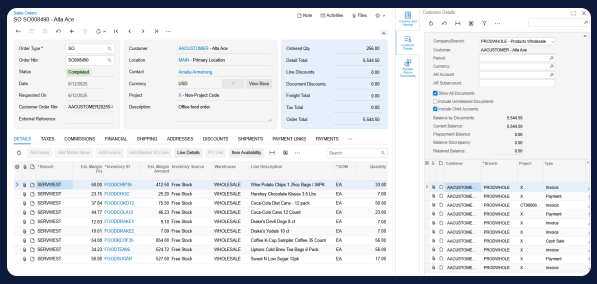
Acumatica
The Cloud ERP

DATASHEET · DISTRIBUTION

Sales Order Management

Streamline ordering, fulfillment, and delivery by giving sales real-time data to improve customer service. Promise ship dates with Available-to-Promise, boost sales with AI-powered item suggestions, and manage flexible pricing, inventory allocation, PO linking, and drop shipments.



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.

Promise dates you can keep

- See projected supply and demand on the order line with Available-to-Promise (ATP), and identify the earliest date the full quantity can ship
- Apply that date to the order during the customer conversation
- Item classes set the availability calculation rule, while order types drive safety stock treatment

Automate sales activities for better customer service

- **Order suggestions.** Boost sales with item substitution, up-sell, and AI-powered cross-sell suggestions.
- **Integrated workflow.** Automate and customize order processing by order type, with configurable statuses, actions, notifications, and alerts.
- **Configurable order types.** Predefine inventory allocation rules, workflow scenarios, and documents generated in Accounts Receivable and Inventory Management.

Price, discount, and capture orders your way

- **Flexible discounts and promotions.** Set quantity and volume discounts as a percent or amount, define multiple rules and sequences, or let the system apply the best combination.
- **Multiple entry points.** Create orders from order entry, import files, or converted quotes; open APIs support EDI, commerce, and retail POS systems.
- **Prepayment invoices.** Create prepayment invoices for orders that already have payments, including those imported from external systems.

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

Quote-to-Cash with Acumatica
LEARN MORE →

Resilient Sales Strategies
LEARN MORE →

Schedule a Personalized Demo
LEARN MORE →

> "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

Capabilities

From quote to cash, every order step runs on the same customer, inventory, and financial record.

ORDER ENTRY AND PRICING

Available-to-Promise (ATP)

See projected supply and demand on each line and commit to the earliest date the full quantity can ship.

Item Suggestions

Item substitution, up-sell, and ML-powered cross-sell suggestions during order and quote entry, and for online orders.

Manage Pricing and Discounts

Price by warehouse and unit of measure, and exclude automatic line discounts from promotional prices to protect margins.

Margin Visibility

Review estimated margin percentages and amounts for the order and each line during entry.

Blanket Sales Orders

Generate releases from contracts with predefined quantities, dates, and ship-to locations.

Counter Sales / Mixed Orders

Process sales and returns on a single order for walk-in counter customers.

Credit Limit Verification

Check credit limits before release. Holds lift automatically with payments, and authorized users can override.

Sales Tax Exemption Certificates

Collect and manage exemption certificates with Avalara Exemption Certificate Management.

FULFILLMENT

Inventory Allocation

Set allocation rules with over-allocation warnings, and prioritize orders on the Manage Sales Allocations screen.

Order Orchestration

Select the fulfilling warehouse automatically with configurable business rules.

Multiple and Partial Fulfillment

Split orders across warehouses by availability and cost, and track partial shipments and backorders.

Shipment Schedules

Set delivery dates per line and generate shipments by schedule and availability.

Pick Lists and Replenishment

Generate pick lists by availability and location priority, and hold orders until replenishment arrives.

PURCHASING AND INTERCOMPANY

PO Linking

Link sales orders to purchase orders, automatically allocate received goods to the linked sales order, or create drop-ship POs from order entry.

Cross-Company Transactions

Create a sales order in one company from a purchase order in another, with intercompany drop-ship and returns.

SHIPPING AND BILLING

Rate Shopping

See lowest-cost carrier services first, with clear signals for which meet the requested delivery date.

Package Weights

Capture weights from scales via Device Hub during shipment preparation.

Invoice Consolidation

Consolidate multiple shipments onto one invoice, with optional price and discount review.

Payment Status

Filter inquiries and trigger business events by card and ACH status, with warnings for expiring pre-authorizations.

Returns Management

Process RMA orders as a credit or replacement, with reason codes.

PLATFORM

System-Wide Integration

Integrates with CRM, Inventory, Requisition, and Purchase Order Management, AR, Production, and Field Service.

Custom Workflows

Automate quote conversion, status updates, returns, and pick, pack, and ship by order type.

Role-Based Dashboards and Side Panels

Dashboards for sales managers and shipping clerks; side panels with customer, item, and order details.

OPTIONAL

Shipping Integration

Connect EasyPost and ShipStation API aggregators for UPS, FedEx, and USPS small parcel, plus Marketplace apps for LTL, transportation, and logistics.

EDI Integration

Synchronize orders from connected EDI applications in the Acumatica Marketplace to reduce manual entry.

ABOUT ACUMATICA

Acumatica Cloud ERP is a comprehensive business management solution that was born in the cloud and built for more connected, collaborative ways of working. Designed explicitly to enable small and mid-market companies to thrive in today's digital economy, Acumatica's flexible solution, customer-friendly business practices, and industry-specific functionality help growing businesses adapt to fast-moving markets and take control of their future.

For more information on Acumatica, visit **www.acumatica.com** or follow us on **LinkedIn**.

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