

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 of sales order management

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.

The screenshot displays the 'New York - Sales Orders' window. It includes fields for Order Type (SO), Order Number (000586), Status (Open), Date (2/3/2009), Requested On (2/3/2009), Customer Order (SO004-07-06), and External Reference. The Customer is SO000004D5 - SO customer #4D5, with Currency USD and a rate of 1.00. The Project is X - Non-Project Code. The Order Total is 16,700.00. Below these fields are tabs for Document Details, Tax Details, Commissions, Financial Settings, Payment Settings, Shipping Settings, Discount Details, Shipments, Payments, and Totals. The 'Document Details' tab is active, showing a table with columns: Line Nbr., U, B, Inventory ID, Line Description, Q, Qty On Sta, Op Qty, Unit Price, Discr Percen, Dis Am, Disc Cod, Ext. Price, Ship On, Ship Compl, Undership Threshold (%), and Thres. The table contains four lines of data for various inventory items.

Line Nbr.	U	B	Inventory ID	Line Description	Q	Qty On Sta	Op Qty	Unit Price	Discr Percen	Dis Am	Disc Cod	Ext. Price	Ship On	Ship Compl	Undership Threshold (%)	Thres
3		M...	SO000000...	SO Item #...	P...	100.0	0.00	100.0	20.00	0.000000	0.00	2,000.00	2/3/20	Back...	100.00	
9		M...	SO000000...	SO Item #...	P...	100.0	0.00	100.0	20.00	0.000000	0.00	2,000.00	2/3/20	Back...	100.00	
15		M...	SO000000...	SO Item #...	B...	5.00	0.00	5.00	390.0	0.000000	0.00	1,950.00	2/3/20	Back...	100.00	
21		M...	SO000000...	SO Item #...	C...	10.00	0.00	10.00	195.0	0.000000	0.00	1,950.00	2/3/20	Back...	100.00	
27		M...	SO000000...	SO Item #...	P...	1.00	0.00	1.00	1,900	0.000000	0.00	1,900.00	2/3/20	Back...	100.00	

On Hand 200.00 PC, Available 200.00 PC, Available for Shipping 200.00 PC, Allocated 0.00 PC

Build sales orders from customized templates that specify workflow, shipping, inventory, priority, invoicing, and backorder options.

Additional sales order management features and benefits

Automated shipments	Fulfill large volumes of shipments using predefined packing rules for specific products. Acumatica can automatically determine packaging, generate labels, and confirm shipments for multiple orders with just a few clicks
UPS and FedEx 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.

Additional sales order management features and benefits

Acumatica is a leading provider of cloud business management software that empowers small and mid-size businesses to unlock their potential and drive growth. Built on the world's best cloud and mobile technology and a unique customer-centric licensing model, Acumatica delivers a suite of fully integrated business management applications such as Financials, Distribution, CRM and Project Accounting, powered by a robust and flexible platform.

Take control of your business	Successful companies know the value of having visibility and control over their business. Acumatica enables you to drive growth, manage costs, and be productive.
Play to your strengths	Every business is unique. Play to your strengths by doing what works best for your company. Tailor your business management software to fit your exact needs, no matter how specific your requirements.
Empower your people	Your business isn't confined to four walls. Why should the people that impact your business be? Acumatica goes wherever your people go – anytime, anywhere, and on any device.