

DATASHEET

Order
Management

Automate from Quote to Cash for Easier, Faster Order Management

Order management gets challenging when you need to make corrections or changes, when you need to enter data manually, and when disparate recordkeeping systems don't talk to each other. Sage Intacct Order Management **closes the gaps and automates even the most complex quote-to-cash** processes. So you can handle higher order volumes, sophisticated workflows, and complex pricing structures—all while **saving time, ensuring accuracy, and improving profitability.**

Key Benefits

Enter Orders Once, and Only Once

Save staff hours, costs, and reduce errors. Simply input a new order once and you're done: the order automatically flows to fulfillment, billing, revenue accounting, and everywhere else you need it to go. Sage Intacct Order Management automates your unique order management workflows and pricing requirements using easy-to-configure templates.

Make the Sales Connection

Improve customer service and customer satisfaction with a financial management system that integrates seamlessly with Salesforce Sales Cloud. Sales and finance groups can share pricing data, order status,

and other information, while you generate orders and subscription invoices—without entering the data twice. The Sage Intacct system also integrates seamlessly with Avalara sales tax software, so you can automatically calculate and apply the right sales taxes as well as comply with regulations in any jurisdiction.

Measure, Report, and Improve

Give sales and financial teams the clearest view of relevant, real-time data. Track your order fulfillment rates, sales numbers, and inventory quantities. See the true drivers of business performance, such as which products, sales reps, and customers are driving the most profit—and why. If you can ask it, Sage Intacct can answer it.

HOME DASHBOARDS REPORTS COMPANY GENERAL LEDGER **ORDER ENTRY** ACCOUNTS PAYABLE PURCHASING TIME & E

Sales Order

Print/Email Done More actions

Transaction History

Marley Stapleton (C-1066)

Transaction date	Date due	Item totals	Subtotals	Transaction total	Transaction status
12/09/16	01/08/17	5,000.00	0.00	5,000.00	Converted

Date
12/09/16

Customer
C-1066--Marley Stapleton

Bill to
B_C-1066

Ship to
Marley Stapleton(CC-1066)

Project and Grant
--

Document number
SO-0085

1600 Longview Way
Luckenbach, TX 78612

1600 Longview Way
Luckenbach, TX 78612

Payment terms
Net-30

Message
--

Contract ID
--

Ship date
01/08/17

Ship via
--

Contract description
--

Reference
2017 Gateway Sponsor

Attachments
--

State
Converted

Entries

Item ID	Item description	Site	Project and Grant	Quantity	Unit	Qty converted	Price	Extended price	Drop ship
1 00038--Sponsor Gold Level	Sponsor Gold Level	Main	120--Unite Forever	1	Each	1	5,000.00	5,000.00	<input type="checkbox"/>
Total								5,000.00	

With the touch of a button, generate orders from within the Sage Intacct system using quotes from Salesforce.

Key Features

Automate and Streamline

Automatic order creation from quotes

Ensure accuracy and save time by eliminating data reentry.

Order management document generation

Easily create quotes, sales orders, back orders, invoices, returns, credit memos, debit memos, and more—and rapidly deliver them via email.

Calculations

Easily compute discounts, shipping, handling, and other charges for each document using flexible subtotaling.

Best practices templates

Process quotes, orders, invoices, credit memos, returns, and shippers using workflows from supplied

templates. Or configure your own to fit your business model—no programming required.

Streamlined services and billing processes

Automatically create services invoices from order fulfillment.

Defined prices and discounts

Configure different pricing schedules for customer groups or individuals by time periods, products, or entire product lines.

Flexible pricing options

Work with virtually any pricing structure—from simple fixed prices to a series of price schedules.

Connected Order Management (Optional Modules Required)

Revenue management integration

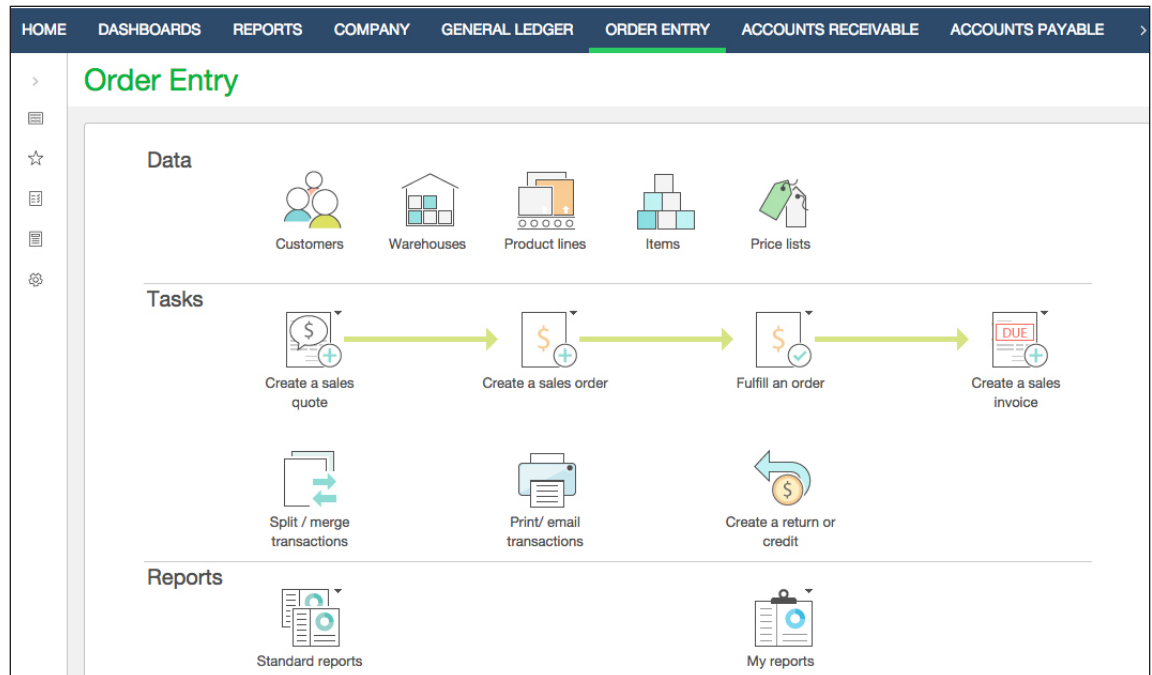
Ensure revenues are recognized correctly with order data that flows seamlessly to Sage Intacct Revenue Management.

Salesforce integration

Drive revenue recognition, project accounting, and billing processes from orders originating in Salesforce, providing sales teams with instant visibility into order status, billing, and payments.

Preconfigured Zuora cloud connector

Enjoy smarter revenue recognition by managing subscription orders and transactions, and automating revenue recognition using bookings data.



Quickly access specific order management tasks or data using visual navigation.

Key Features

Sales tax management

Easily streamline sales tax compliance with the AvaTax for Sage Intacct module, a comprehensive sales tax solution jointly developed with Avalara.

Reporting

Price list report

Quickly access the prices of items on price lists, along with quantity price breaks.

Order analysis reports

Easily analyze order inventory.

Sales analysis reports

Review and track profitability by products, and identify buying patterns using any combination of items, customers, territories, product lines, and sales reps.

Dashboards, reports, and performance cards

Analyze sales, inventory, and profitability trends.

Custom analyses

Get more strategic insights with custom analyses across multiple attributes such as items, customers, product lines, and sales reps.

Take the Next Step

Find out how the Sage Intacct cloud financial management solution streamlines operations and provides real-time insights, boosting productivity and growth.

For more information about how Sage Intacct can help you drive improved performance in your business, visit our website: <https://www.sageintacct.com/order-management-software> or contact us at **877-437-7765**.

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