ORDER MANAGEMENT

Automate from quote to cash for faster, easier order management.

Order management gets challenging when you need to make corrections or changes, when you need to enter data manually, and when disparate record keeping 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 fulfilment, 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.
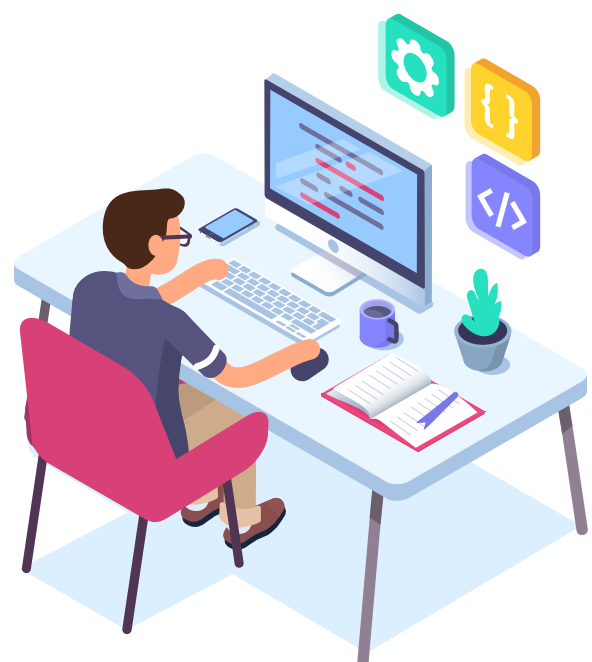
Make the sales connection

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 fulfilment 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.

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

KEY FEATURES

Automate and streamline

Automatic order creation from quotes
Ensure accuracy and save time by eliminating data re-entry.

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 sub-totalling.

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 fulfilment.

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.
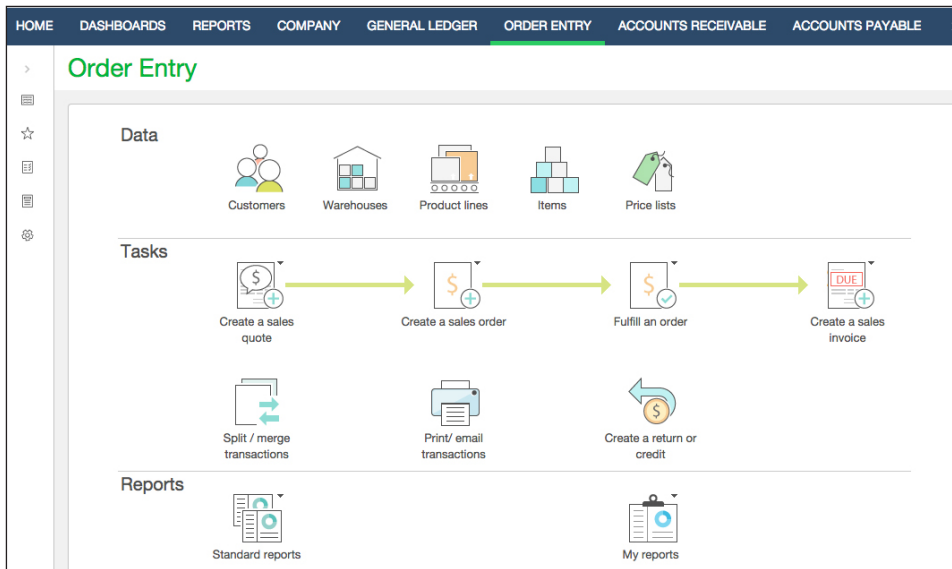
Connected order management (optional modules required)

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.

Quickly access specific order management tasks or data using visual navigation

KEY FEATURES

Preconfigured Zuora cloud connector
Enjoy smarter revenue recognition by managing subscription orders and transactions and automating revenue recognition using bookings data.

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 analyse 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
Analyse 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.

SAGE BUSINESS PARTNER

At Percipient, we can help you get the most out of Sage Intacct. We are experienced in providing finance solutions across a wide range of industries, ensuring they work hard for our customers and deliver optimal performance to match their needs.

Call us today on **01606 871332** to talk to a Sage Intacct expert and book a product tour.