



percipient

 DATASHEET

SAGE INTACCT ORDER MANAGEMENT

Sage Intacct software removes the manual work from multi-channel order management and conforms to your unique workflow and pricing requirements. Simply input orders when they come in – and never enter them again.

Streamlining even the most complex quote-to-cash processes, cloud-based Sage Intacct order management software is sophisticated enough to handle higher order volumes, order processing complexity, inventory challenges, and pricing structures.

The result? An order-management system that saves time, improves accuracy and increases profitability.

WHY CHOOSE SAGE INTACCT?

- Save time, move fast
- Always trust the numbers
- Collaborate in real-time
- See the full financial picture
- Automate & streamline processes
- Complete integration
- Future-proof performance

MUST HAVE FINANCE FEATURES

TOOLS THAT MAKE A DIFFERENCE

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 practice 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 & billing processes: Automatically create service invoices from order fulfilment.

Defined prices & 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.

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 & performance cards: Analyse sales, inventory and profitability trends.

SAGE INTACCT BENEFITS

ENTER ORDERS ONCE

Save staff hours, cut 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.

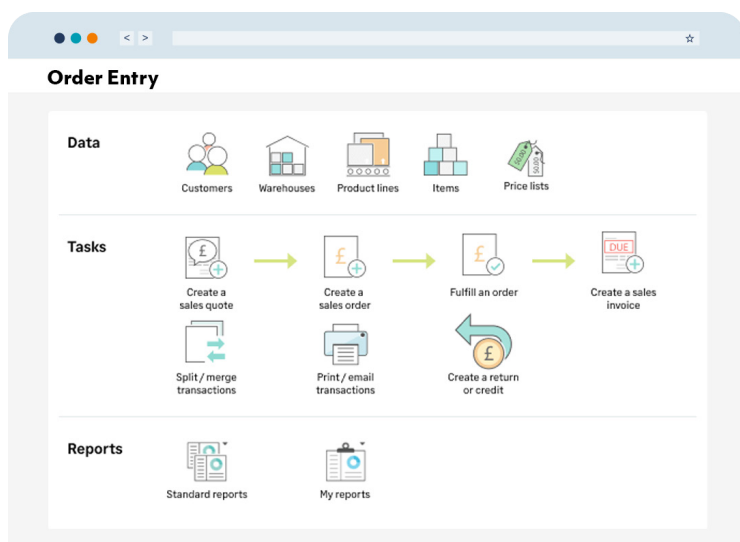
MEASURE REPORT & IMPROVE

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.

MUST HAVE FINANCE FEATURES

TOOLS THAT MAKE A DIFFERENCE

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



CONNECTED ORDER MANAGEMENT (OPTIONAL MODULES REQUIRED)

Revenue management integration: Ensure revenues are recognised 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.

Pre-configured Zuora cloud connection: 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.

BEST-OF-BREED SOFTWARE

FINANCE MADE SIMPLE

Sage Intacct offers a wide range of accounting capabilities, in a modular format that gives each department within your organisation the flexibility to choose the best software applications for its needs.

If you would like to know more about Percipient and how we can help you invest in the right finance technology for your business, call the team on **01606 871332**.