Sage Intacct Order Management

Making it easy doesn't have to be hard.

Orders are core to the success of your business and the more orders you receive the better the benefit to your bottom line. Or could you actually be leaving money on the table with inefficient processes? Growth often includes more orders, unique order requests, maybe even services orders, all with an increasing pressure for status visibility and quicker processing. How can you possibly simplify this across all teams and processes?

Sage Intacct can help. It is cloud based for anytime, anywhere access. It provides you with a secure multi-tenant, collaborative framework from the front office, the back office and even to the warehouse as well as multiple locations. Sage Intacct Order Management establishes consistent and scalable best-practice standards to help improve efficiency across the entire order lifecycle with automation, visibility, and control for shorter order cycle times, accelerated cash flow, and happier customers.

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Key benefits

Enter orders once, and only once
As part of Sage Intacct Accounting Core Financials, Order Entry helps cut hours, costs and errors in the quote-to-cash process. Once an order is entered, information automatically flows to fulfillment, billing, revenue accounting, and everywhere else you need it to go. Sage Intacct Order Entry 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 or with your favorite customer relationship management (CRM) system using our open API. Your sales and finance teams share the same pricing, order, and other information and can generate orders and subscription invoices—without entering the data twice.

Cut sales tax complexity
Ensuring you have options as you scale into new markets, Sage Intacct helps you automatically calculate and apply the right sales taxes while complying with the most recent regulations in any jurisdiction with its Sales and Use Tax module or with the seamlessly integrated Avalara sales tax software.

Measure, report, and improve
Make collaboration effortless by providing teams across your company with a view of relevant, real-time data. Track your order fulfillment rates, sales numbers, and inventory quantities. Easily monitor your business drivers such as which products and customers are driving the most profit—and why.

Key features

Automate and streamline the entire order cycle

Defined prices and discounts
Improve profitability and configure different pricing schedules for customer groups or individuals by time periods, products, or entire product lines. Set usage restrictions for automated control.

Flexible pricing options
Build in agility with pricing structures from simple fixed prices to a series of price schedules.

Best practices templates
Bring standardization and process efficiency to quotes, orders, invoices, credit memos, returns, and shippers using out-of-the box workflow templates. Or configure your own to fit your business model—no programming required.

With a single click, generate orders from within Sage Intacct using quotes from Salesforce.

Automate quote to cash
Ensure accuracy and save time by eliminating data reentry. With a single click create orders from quotes and generate invoices from orders.

Information spanning the order cycle all in one place
With all of the real-time data in one place, teams can easily create items such as quotes, sales orders, back orders, invoices, returns, credit memos, and debit memos; send them via email; and reference the automated audit trail for quick and consistent status answers and effortless collaboration.

Built-in order quality control
Improve accuracy and accelerate cashflow when you easily compute discounts and other charges for each of the above mentioned documents using flexible subtotaling for a layer of quality control prior to issuing.

Schedule recurring orders
Free your employees from the mundane and schedule repeat transactions to occur at the desired frequency.

Automate revenue recognition schedules
Cut the complexity and use scheduling templates to automate deferred revenue tracking from Accounts Receivable or Order Entry sales transactions.

Streamlined services and billing processes
Automatically create service invoices from sales order information.

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Key features continued

Unique multi-dimensional reporting

Price list report
Create pricing strategies for items whose prices are determined based on a fixed fee, the quantity used, or the contracted quantity. Track details such as price breaks for various item quantities, price list, product line, items, and effective dates—providing easy, permissioned access for those entering orders.

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
Make decisions quicker with a single-pain view and access to analyze sales, inventory, and profitability trends.

Connected order management (optional modules required)

Revenue management integration
Streamline deferred and renewals revenue recognition and simplify reporting and forecasting with order data that flows seamlessly to Sage Intacct Revenue Management.

Salesforce integration
With a single click, convert Salesforce quotes into Sage Intacct orders. Chatter is embedded in Sage Intacct enabling finance and sales to easily collaborate on related transactions in both Salesforce and Sage Intacct.

### Contract expense management and revenue recognition
Effortlessly flow your customers' contract data throughout the system, enabling cross-functional teams to collaborate and work from the same data for more accurate and accelerated order, fulfillment, billing, and invoicing cycles. Cut the complexity in meeting ASC 606 requirements and keep customers happy with usage, subscription, and many more automated billing and revenue recognition options.

Inventory Management
Avoid tying up cash and mismanaging inventory levels when you track all types of items and stock across multiple locations, from procurement and receipt, to kitting, shipping, and reordering,

Sales tax management
Streamline US and or international sales tax compliance within Core Accounting, using the Sage Intacct Sales and Use Tax module or using the AvaTax for Sage Intacct module, a comprehensive sales tax solution jointly developed with Avalara.
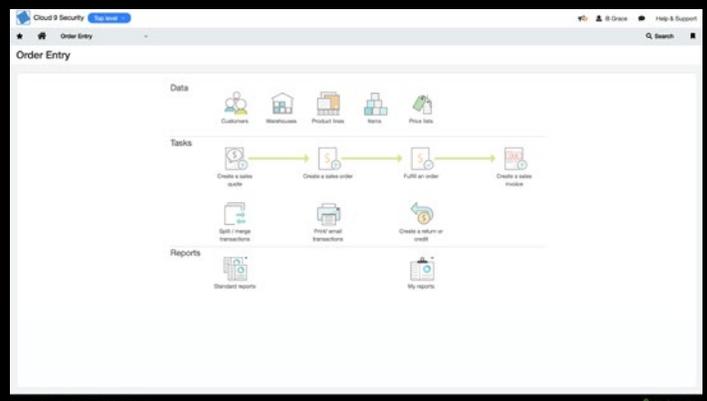
Quickly access specific order management tasks or data using visual navigation.

sageintacct.com/order-management-software
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