


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 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.

Sales Order									
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.

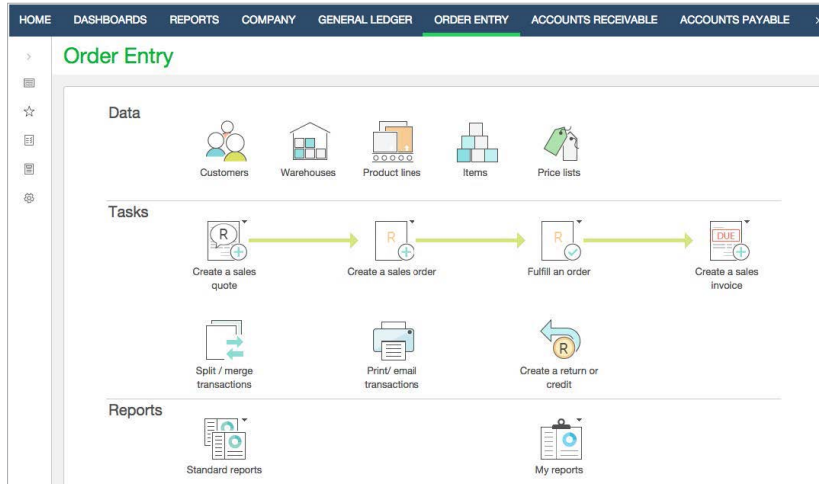
Key features

Automation and efficiency

- **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 subtotalling.
- **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 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.
- **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.



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

Key features

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.

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

For more info, visit: www.sage.com/za/intacct or contact us at **0861 237 243**

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