Intacct®

Intacct Order Management

Intacct Order Management is a complete solution for bridging the gap between sales and finance to improve client satisfaction, reducing costs by automating the order-to-cash cycle, increasing sales by encouraging the use of profitable channels and delivering accurate, timely information to everyone involved in the process. Intacct Order Management provides complete integration across the quote-to-collect process to ensure that orders match quotes, and that invoices are accurate.

Flexible, Customizable for Your Business

Intacct Order Management allows you to easily generate customer quotes, sales orders, back orders, invoices, returns, credit memos, debit memos and more. You enter data once and Intacct Order Management automatically carries the appropriate data through your workflows. For example, you can automatically create an order from a quote, ensuring accuracy while reducing errors due to data re-entry. Intacct Order Management supplies a set of best practices templates — quotes, orders, invoices, credit memos, returns and shippers. You can customize these templates, or create new ones, to precisely fit your business. It is easy to configure Intacct Order Management to match your business model, without programming, and you can easily define

the order entry transactions that reflect your business workflows.

Comprehensive Integration

Intacct Order Management is fully integrated with our financial management applications, including Intacct Accounts Receivable, Intacct General Ledger and Intacct Inventory. This allows you to create a seamless chain of transactions from issuing quotes, to receiving merchandise into your warehouse, to invoicing your customers. When users create transaction documents, Intacct Order Management automatically checks inventory levels, generates shippers and creates backorders. Running totals inform you of how many items are on-hand, on-hold and backordered. Anywhere, anytime Internet-based technology lets you link multiple warehouse, sales and administrative locations without expensive IT infrastructure.

Sophisticated Pricing Options

Intacct Order Management makes it easy to define a wide range of flexible pricing options that vary from simple fixed prices, to a chain of price schedules with which you can create virtually any pricing structure. You can define prices and discounts for customer groups or individual customers by time periods, for specific products or their entire product lines. Documents have flexible subtotaling, which allows you to compute discounts, shipping,
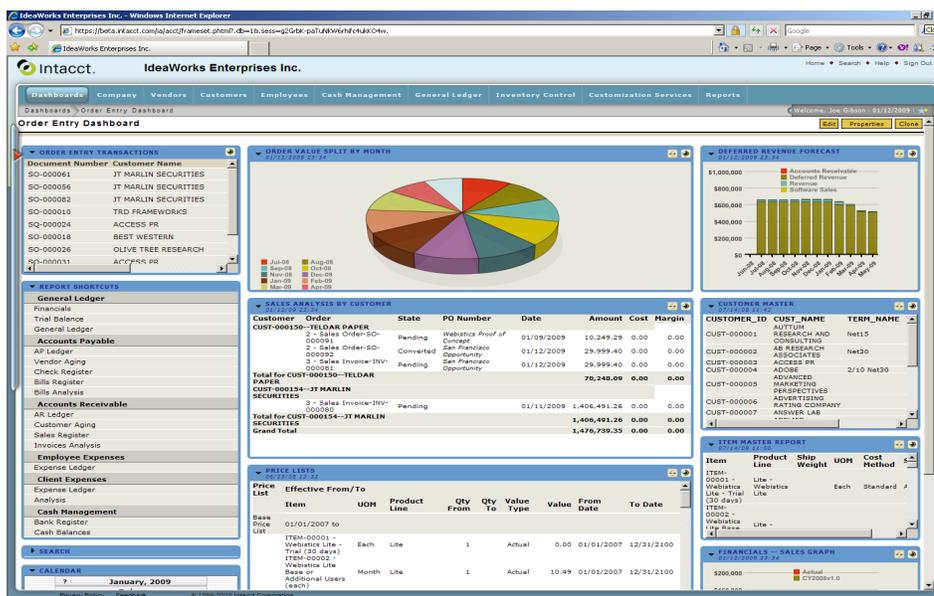
Configurable dashboards let you view all order activity at a glance.

handling and other charges. You can apply sales tax and other taxes as a fixed percentage or use schedules that are as complex as necessary using the Advanced Tax Engine. Your subtotal amounts post to any GL account.

Reports to Manage Your Business

Sophisticated dashboards and reports enable the sales team and management to analyze sales, inventory and profitability. The price list report shows the selling price of items on price lists, along with quantity price breaks. The order analysis report enables users to analyze order inventory. Are enough items available to fill all the orders? Which customers are ordering which items? What items and product line move fast? The sales analysis report examines your inventory in terms of what has sold. You may limit the report to any combination of items, customers, territories, product lines and even sales rep. You can also use this report to calculate commissions based on sales.

Integration with Salesforce: Save Time, Increase Accuracy

For users of Intacct MAX™ for Salesforce, Intacct's built-in support for Salesforce, you can convert opportunities created in Salesforce to sales orders in Intacct Order Management and you can convert accounts and contacts from Salesforce to customers in Intacct. This seamless conversion eliminates redundant data entry and errors from retyping data. Order status and payment status are available to your sales team from within Salesforce, empowering your front-office team with the back-office information they need to manage their accounts, such as shipping and billing status, payment information and collections actions. If your sales team is using Salesforce, this integration provides the best quote-to-collect capabilities available in any system on the market.

Key Features

- Multiple bill to and ship to contacts
- Multiple tax subtotal lines by fixed percentage, or on schedules variable by geography, customer and other criteria
- Unlimited product hierarchies and product lines; apply pricing and discounts to entire lines
- Track unlimited customers along with quantity price breaks and discounts

Intacct. A Better Way to Run Your Business.

Superior financial applications. Real-time business visibility. An open, on-demand platform. Easy administration and configuration without programming. You can have all these things and the highest rate of customer success and satisfaction and the lowest total cost of ownership. Contact us to learn how Intacct can help you run your business, on-demand.

Sales Quote → Sales Orders → Ship Orders → Sales Invoices → Order Returns and Credits

Print Sales Quote | Print Sales Orders | Print Shippers | Print Sales Invoices

Reports
Order Entry Status
Customer Backlog
Shipment History
Price List
Customer List
Pick List
Order Analysis
Sales Analysis
Item Profitability

Comprehensive order management functionality automates the complete order-to-cash cycle.

Intacct