

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. 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 fulfillment, billing, revenue accounting, and everywhere else you need it to go. Intacct Order Management automates your unique order management workflows and pricing requirements using easy-to-configure templates.

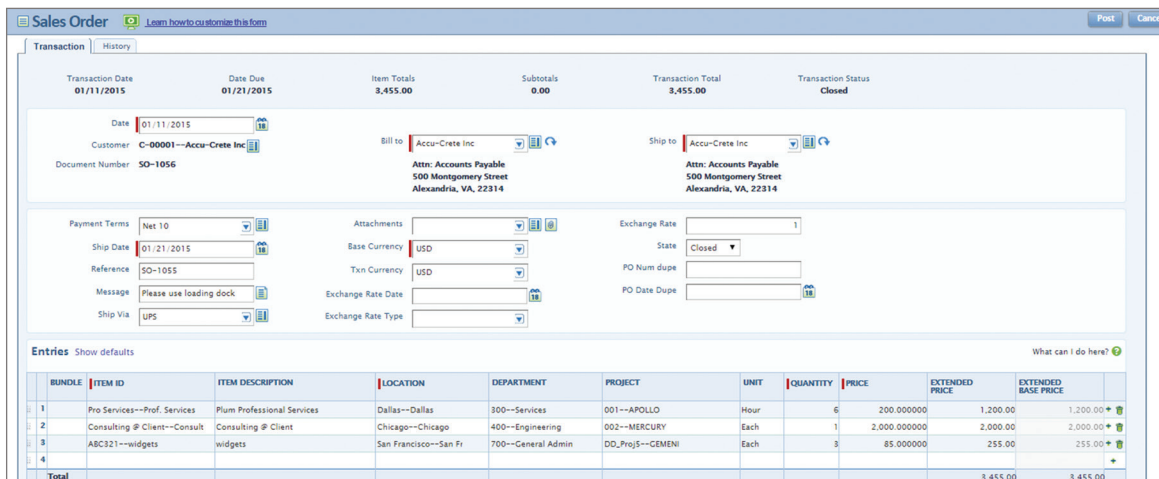
Make the sales connection

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 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 fulfillment 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, Intacct can answer it.



The screenshot shows the Intacct Sales Order interface. At the top, there are tabs for 'Transaction' and 'History'. Below this, a summary section displays key transaction information: Transaction Date (01/11/2015), Date Due (01/21/2015), Item Totals (3,455.00), Subtotals (0.00), Transaction Total (3,455.00), and Transaction Status (Closed). The main form area contains fields for Date (01/11/2015), Customer (C-00001--Accu-Crete Inc), Document Number (SO-1056), Bill to (Accu-Crete Inc), and Ship to (Accu-Crete Inc). It also includes sections for Payment Terms (Net 10), Attachments, Exchange Rate (1), Ship Date (01/21/2015), Base Currency (USD), State (Closed), Reference (SO-1055), Txn Currency (USD), PO Num dupe, Message (Please use loading dock), Exchange Rate Date, and PO Date Dupe. At the bottom, there is an 'Entries' section with a table showing item details.

BUNDLE	ITEM ID	ITEM DESCRIPTION	LOCATION	DEPARTMENT	PROJECT	UNIT	QUANTITY	PRICE	EXTENDED PRICE	EXTENDED BASE PRICE
1	Pro Services--Prof. Services	Plum Professional Services	Dallas--Dallas	300--Services	001--APOLLO	Hour	6	200.000000	1,200.00	1,200.00
2	Consulting @ Client--Consult	Consulting @ Client	Chicago--Chicago	400--Engineering	002--MERCURY	Each	1	2,000.000000	2,000.00	2,000.00
3	ABC321--widgets	widgets	San Francisco--San Fr	700--General Admin	DD_ProjS--CEMENI	Each	3	85.000000	255.00	255.00
Total									3,455.00	3,455.00

With the touch of a button, generate orders from within the Intacct system using quotes from Salesforce.

Key features

Automate and streamline

Automatic order creation from quotes: Ensure accuracy and save time by eliminating data reentry.

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 fulfillment.

Defined prices and discounts: Configure different pricing schedules for customer groups or individuals by time periods, products, or entire product lines.

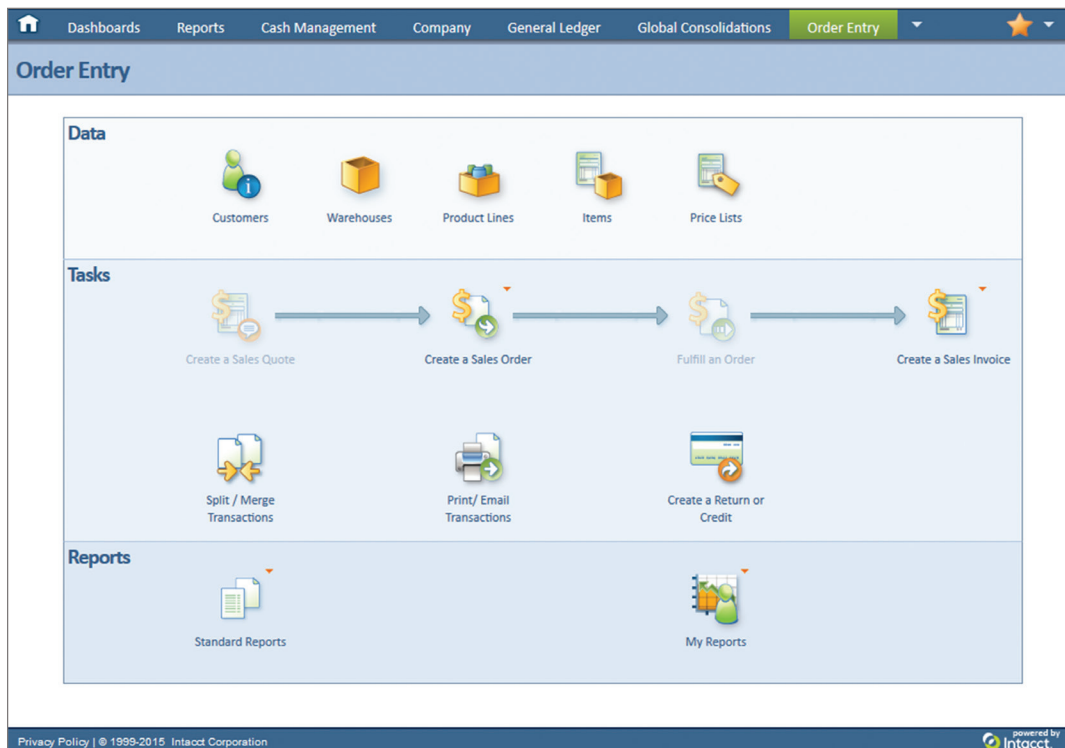
Flexible pricing options: Work with virtually any pricing structure—from simple fixed prices to a series of price schedules.

Connected order management (optional modules required)

Revenue management integration: Ensure revenues are recognized correctly with order data that flows seamlessly to 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.



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

Key features

Sales tax management: Easily streamline sales tax compliance with the AvaTax for 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 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: Analyze 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.



For more information, contact The Resource Group, an authorized Intacct Partner.

Take the next step

Find out how the Intacct best-in-class cloud ERP solution streamlines operations and provides real-time insights, boosting productivity and growth.



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