



Efficiency Series

KEY BENEFITS

Speed Up Order Entry

- Order entry drops from 10 minutes to seconds, discrepancy checking included.
- Early adopters recover more than a week of staff time every month.

Protect Your Margin

- Pricing is validated against your Acumatica configuration before an order is created.
- Discrepancies are flagged automatically, not caught after the fact.

Eliminate Manual Errors

- Customer part numbers are matched to your Acumatica inventory IDs automatically.
- Humans review the order, they don't rekey it.

Keep Control While You Automate

- Your team reviews a clean recognition document before approving with one click.
- Speed of automation with the control of human oversight.

Scale Without Adding Headcount

- Order volume can grow without growing the team.
- CSRs are freed to focus on relationships and account growth, not data entry.

SEE HOW IT WORKS IN ACUMATICA

Schedule a 15-minute walkthrough or request a demo today.

sales@crestwood.com | crestwood.com

SALES ORDER AGENT FOR ACUMATICA

Automate order entry. Eliminate costly errors.



Sales Order Agent Features and Capabilities

Automated PDF Reading

Reads incoming PDF customer orders straight from a dedicated email inbox, no manual download required.

AI-Powered Data Extraction

Pulls customer details, PO number, line items, quantities, and pricing from every order automatically.

Pricing Validation

Checks order pricing against your Acumatica configuration before anything is created.

Alternate Item ID Mapping

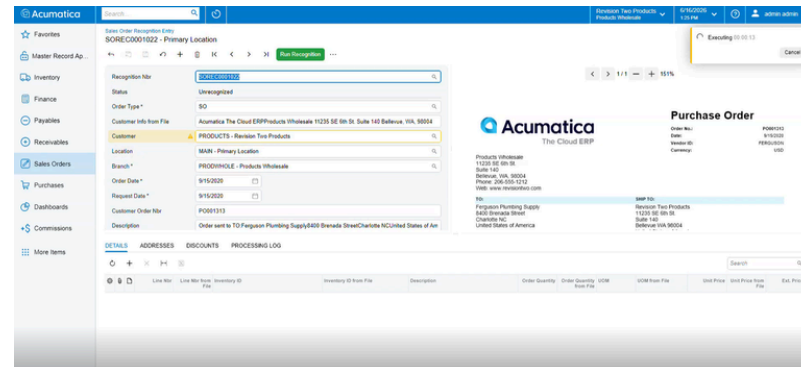
Matches customer part numbers to your Acumatica inventory IDs automatically.

Review-Before-Confirm Document

Compare the original PDF side-by-side with a validated recognition document before approving.

Native to Acumatica

Built directly within Acumatica for a seamless experience and reliable performance.



Why Crestwood Products

Crestwood Products are built to extend and enhance Acumatica solving the real challenges businesses face every day. Developed by Crestwood Associates, an award-winning Acumatica Gold Certified Partner with 25+ years of ERP experience, our add-ons deliver automation, control, and measurable ROI.

