Acumatica
The Cloud **ERP**

16 Ways Businesses and Organizations Grow with Acumatica Cloud ERP

GROW WITH A MODERN AND AGILE ERP SYSTEM

Businesses and organizations outgrowing entry-level accounting software and those running legacy ERP applications struggle to adapt to today's rapidly changing business environment. As a result, companies are hampered by high IT costs for one-off integrations and intrusive customizations, providing minimal functionality to grow into new markets.

Modern ERP applications like Acumatica empower businesses and organizations with advanced financial features providing a holistic system for growing companies. With Acumatica, organizations expedite month-end close, automate the AP payment process, and reduce days sales outstanding (DSO) with flexible credit limits and credit terms, automated dunning letters, and proactive collection activities.

Embedded CRM arms organizational executives with high-quality leads to boost sales with exemplary customer support through native case management and self-service customer portals. Manage your entire business using powerful insights with configurable inquiries, personalized reports, role-based dashboards, and real-time business analytics. Acumatica's focus on customer-centric business practices, award-winning customer support, and dedication to the world's best reseller and developer community protects customer's investments in their strategic ERP platform providing ample options for continued growth.

This eBook explores sixteen ways that businesses and organizations grow with Acumatica. It shows how organizations align information and workflows to drive significant improvements throughout every area of their financial and business operations on a future-proof cloud platform designed for extensibility.

1. FUTURE-PROOF CLOUD PLATFORM

Choose a Scalable, Cloud ERP Platform

Legacy ERP applications are built on aging technology that is difficult and costly to maintain. Organizations find themselves on rigid technology platforms with limited connectivity to modern, cloud-based applications. Further, premise-based ERP systems require significant investments in IT staff, hardware, and license fees for operating systems and databases. IT administrators struggle to keep everything connected with updates from multiple software publishers and ever-changing infrastructure requirements for new product releases.

Grow and evolve your business with a scalable, secure, and future-proof cloud platform available on any device, anytime, and anywhere. Leverage Acumatica's Open APIs to connect people, information, processes, equipment, and ideas with modern technologies, including cloud computing, big data and analytics, robotics, artificial intelligence with machine learning, and the Internet of Things (IoT). Set a technology foundation for global connectivity with multilingual translations, localized business practices, multicurrency, and international accounting and tax support. Empower employees with a modern ERP application that is easy to use, easy to learn, and adaptable to their specific roles.

"As software developers, we found Acumatica's technology to be elegant, adaptable, and stable. In the era of cloud computing, you do not want to select technology that is decades old."

**- AURI KOSTAMA, HEAD OF FINANCE AND ADMINISTRATION
SMARTTRADE TECHNOLOGIES**

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2. CONNECTED SYSTEMS

Comprehensive ERP Application Suite

Most businesses on entry-level accounting software or legacy ERP platforms make significant development, support, and maintenance investments in one-off integrations and intrusive source code modifications to fill functional gaps.

Modern ERP applications like Acumatica provide everything progressive businesses need to manage their entire organization on a single platform. Further, low-code and no-code integration tools easily connect systems, data, and processes across disparate applications eliminating data silos and manual processes.

Acumatica General Business Edition reduces IT investments with unparalleled breadth across an extensive accounting, sales, project, case, and customer management application suite. Advanced financial features for deferred and recurring revenue, project accounting, contract or policy management, billing, asset depreciation, and payroll provide a holistic system for growing businesses. Generate high-quality leads and boost sales with exemplary customer support through embedded CRM with case management.

3. AUTOMATED BUSINESS PROCESSES

Streamline Processes and Minimize Data Entry

Today's business moves faster than ever. Unfortunately, manual data entry and complex business processes stifle growth while introducing errors and delays into processes that frustrate customers and employees alike. Modern cloud ERP applications like Acumatica provide growing businesses with tools to streamline and automate business processes so they can do more with less staff while error-proofing data entry and business processes.

Acumatica Visual Workflow Engine enables companies to tailor business processes to meet their needs without customizing the system. Start with pre-defined workflows and tailor the standard process or create new workflows from scratch. In addition, Acumatica Visual Workflow Engine is accessible across the cloud ERP application suite, ensuring a smooth transition for unique business processes. Further, Acumatica harnesses the power of artificial intelligence with machine learning to dramatically improve data capture and approval processes for tedious tasks such as accounts payable automation, expense matching, and OCR scanning for business cards. Workflows can be triggered from Business Events to send alerts and notifications to employees, customers, or vendors.

> "We asked Acumatica to automate time tracking for people working in the field. They listened and delivered the Acumatica Project Accounting Suite that allows us to accurately track project profitability . . . Acumatica positions us for growth and lets us establish our own workflows to keep up with our needs. We have ultimate flexibility to make sure our ERP works the way we need it to, not stuck with what used to work."

**- CHARLIE HUTCHINSON, CFO
  INTRACOASTAL ENVIRONMENTAL**

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4. ACTIONABLE REPORTING

Manage Your Organization by Exception with Visual Dashboards, Real-Time Data, and Notifications

Acumatica provides organizations with a powerful suite of reporting and analysis tools for a 360-degree view of their operations. Since everything is on a single platform, data is available with drill-downs to supporting transactions across applications. Monitor key performance indicators with role-based dashboards for financials, operations, sales, projects, and more.

Harness the power of Generic Inquiries to understand what is happening throughout your organization. Generic Inquiries and Business Events are used to push notifications to management and users to alert them to problems or potential issues in the business to take proactive actions in real-time. Create Generic Inquiries without programming using tools to join tables with color-coded results. Gain a strategic view of your business with robust business analytics through native Microsoft Power BI connections, built-in pivot tables, or marketplace connections to other business intelligence applications.

5. COMPLIANCE MANAGEMENT

Reduce Risk with Powerful Compliance Features

Quality compliance regulations force businesses to complicate otherwise simple processes and make significant investments in training and systems to streamline the audit process. Every company faces general regulations such as Sarbanes-Oxley (SOX) financial reporting requirements, IFRS/GAAP accounting principles, and more. These regulations are compounded with federal requirements enforced by government agencies. Acumatica supports domestic sales tax management and international use-tax and value-added tax.

Information regulations include PCI credit card restrictions and cybersecurity regulations. Data security laws include the US CAN-SPAM Act and General Data Protection Regulation (GDPR) in the European Union. In addition, the American Institute of Certified Public Accountants (AICPA) manages SOC, SSAE, and ISAE security standards.

Set a solid foundation with Acumatica to manage labor regulations and safety protocols set forth by the Occupational Safety and Health Administration (OSHA), Health Insurance Portability and Accountability Act (HIPAA), Fair Labor Standards Act, workers' compensation, trade union requirements, Family and Medical Leave Act (FMLA), and others.

Discover Why Leading Organizations Rely on Acumatica for their Success

LAUNCH THIS VIEWER

6. ROBUST FINANCIALS

A Complete and Advanced Accounting Suite

Acumatica General Business Edition includes robust accounting software with advanced applications powered by artificial intelligence with machine learning to automate quote-to-cash, procure-to-pay, and other accounting processes. Connect to thousands of financial institutions and streamline intercompany transactions. Flexible international features support multilingual translations, multicurrency, and localized accounting and business rules such as IFRS, GAAP, and global tax management for use-tax and value-added tax.

CORE FINANCIALS

Harmonize financials with sub-accounts, budgeting, and flexible financial periods with Acumatica's General Ledger. Get paid faster with streamlined accounts receivable invoicing and native credit and collections. Automate accounts payable transactions with artificial intelligence and machine learning. Reduce manual reconciliation and data entry with cash management and automated bank feeds.

ENTERPRISE ACCOUNTING

Intercompany Accounting automates buy-sell transactions for goods and services between companies with advanced financial reporting, vendor payments, cash management, and more. Track financials and create reports for an unlimited number of companies. In addition, related companies can share charts of accounts, calendars, and currencies with restricted access by branch or company.

REVENUE MANAGEMENT

Maximize revenue through improved cash flow, accurate billing, and superior customer service with the robust Recurring Revenue application. Accurately account for deferred revenue recognition in future periods in compliance with ASC 606 and IFRS 15.

FIXED ASSETS

Maintain visibility of fixed assets with pre-defined or custom depreciation schedules for accurate accounting and reporting. Easily convert purchases into fixed assets. Manage assets under construction assets built from multiple components.

PAYROLL

Eliminate external payroll interfaces and benefit from time integration from financials, project accounting, distribution, manufacturing, construction, and field service. Manage crew times, track union dues, and streamline government reporting. Payroll is available for customers in the US and Canada.

CURRENCY AND TAX

Automate currency conversions with improved insights across international subsidiaries, customers, and vendors. Tax Management streamlines tax collection and compliance for domestic sales tax and international use tax and value-added tax regulations.

PROJECT ACCOUNTING

Professional service organizations and law firms rely on project accounting to track budgets and manage inventory, change orders, timesheets, billing, cost overruns, profitability, and reporting. Projects are included in company-wide financial reports.

TIME AND EXPENSE

Capture employee or crew time for projects, service, manufacturing, and payroll with mobile time entry and approvals workflow. Eliminate manual processes with intelligent expense matching, push notifications, and automated transaction feeds.

"I knew I wanted a solution that was easy to use, easy to understand, easy to implement, and not expensive and that is Acumatica. Now I have a system that provides me with enough analytics to drive my business and support the way we report."

**- RACHID OUADDOUR, FINANCE MANAGER
TRAVELDOO TECHNOLOGIES, AN EXPEDIA COMPANY**

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7. FIXED ASSETS

Manage Resources with Native Fixed Assets

Maintain complete visibility of your fixed assets and depreciation calculations. Create assets from scratch, import them from spreadsheets, add them to the fixed asset application from purchase orders, or create complex assets from purchased components as part of entirely new assets.

Acumatica's embedded Fixed Assets application provides stock depreciation schedules that you can configure to meet your specific business needs. Identify assets by identification number and location with attachments for warranties, user manuals, and other information. Fixed Assets integrate with Purchase Orders and your General Ledger for seamless accounting transactions. In addition, the optional Service Management and Equipment Management applications enable companies that maintain customer equipment to schedule service appointments and manage customer-owned equipment details and history.

8. MOBILE APPLICATIONS

Empower Workers with Mobile Apps

Today's workforce is increasingly mobile. Employees impacted by the global pandemic now find themselves working from home or with hybrid schedules with time in the office or their home office. Top-level executives, sales, field service, human resources, accounting, and other employees must stay connected to manage daily tasks and strategic plans effectively.

As a native cloud application, Acumatica is available anytime, anywhere on any device. Access the entire application suite via secured web browsers or specialized mobile applications. Enter and process transactions remotely, create or approve time entries and expenses, lookup contacts and manage sales cycles, and respond to service appointments or customer support cases from your mobile device. Every Acumatica feature is available from the browser interface, making the application extremely portable and flexible for workers on the go. Acumatica is a modern ERP application that workers access anywhere to manage business activities in real-time independent of unreliable VPN connections or additional hardware and software investments.

"Our people are more effective and can focus on relevant issues rather than manual work and that's as good as gold . . . With our previous systems, departments would work in isolation as each had their own system focus with little consideration for how actions affected another department. With Acumatica's one version of the truth, the understanding and realization that what one department does affects another has created deeper alignment and decisively improved collaboration between departments."

- ZANE ZIETSMAN, CHIEF STRATEGY OFFICER, DIGITAL PLANET

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9. INCREASED LEADS

Embedded Marketing and Sales Automation

Many businesses and organizations operate on razor-thin margins, and competition is fiercer today than ever. As a result, business executives must capitalize on every opportunity and explore new ways to increase revenue from existing customers.

Acumatica General Business Edition helps organizations to generate more leads with connected marketing automation. Create targeted marketing lists and manage campaigns with embedded CRM. Capture website and email analytics with native integration to Hubspot and SendGrid to monitor key performance indicators for website visits, email open rates, and click-through rates.

Sell more products with connected commerce and point of sale and differentiate with new service offerings with embedded field service management. Non-profit and membership organizations can increase donations and improve member renewal rates with up-sell and cross-sell features to boost revenue.

10. IMPROVED RELATIONSHIPS

A True 360-Degree View of Every Customer

Exceed customer expectations with a 360-degree view of every customer interaction. Acumatica's native CRM application connects to every part of the ERP system in real-time. Embedded CRM provides secure access to customer financial transactions, order history, open opportunities, contacts, service appointments, assigned tasks, construction projects, support cases, and even manufacturing estimates and quotes.

Configure the Customer Portal for customer self-service to download statements and invoices. Set up automated workflows for lead assignment with business events to streamline customer communication when sales order shipments are completed, backordered parts are received for their construction project or production order, or when milestones are reached for their projects.

Acumatica includes a robust service and support offering to manage customer support cases with configurable business rules to assign cases to support technicians and Open APIs to connect with online support tools such as online chat.

> "When I came here, the salespeople had no comprehensive reports on what customers were buying. We take about 15,000 orders a year over the web and on the phone… It [Acumatica] saves a lot of time and trouble when getting calls from the customers to be able to easily look up their customer ID and access in a few keystrokes what they've recently purchased as well as other critical information to filling an order accurately and efficiently—it's all easily available. That increases our productivity and enables us to meet shipping requirements of same or next day shipping . . . I'm pretty thrilled about that!"

**- JERRY WALLACE, DIRECTOR OF OPERATIONS
 GREAT COMMISSION PUBLICATIONS**

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11. ORDER PROCESSING

Automate Purchase and Sales Order Processing

Businesses and organizations that purchase services or sell non-stock inventory utilize Order Management to process purchase orders with optional Requisitions Management for vendor bidding and internal approvals workflows. Create sales orders for non-stock items or drop-ship items from vendors directly to customers for sales, service appointments, or projects. Organizations that stock inventory can add Inventory Management for receipts, shipments, lot and serial tracking, warehouse management, and physical inventory management.

Many businesses and organizations benefit from Acumatica Point of Sale powered by IIG for brick-and-mortar retail sales or native online storefront connections for Shopify or BigCommerce. Whatever products or services you purchase or sell, Acumatica has a solution to streamline order management.

12. INDUSTRY SOLUTIONS
Add Specialized Applications for Your Industry

Acumatica General Business Edition is designed for a broad spectrum of businesses and organizations that demand a future-proof ERP platform with robust financials and native applications for customer relationship management, payroll, project accounting, and more.

Today's businesses and organizations are truly diverse. There are non-profit organizations that manufacture products and provide field services. There are professional service organizations with construction and commerce needs. Further, businesses in other industries have requirements beyond core financials and customer management.

Many businesses and organizations benefit from adding industry applications such as inventory management and warehouse management for distribution, production management and bills of material and routings for manufacturing, point of sale and commerce connectors for retail and ecommerce, and field service and project accounting for construction. The beauty of modern ERP applications like Acumatica is the ability to configure optional native applications to support all parts of the business to tailor the ERP system to meet unique requirements without intrusive customizations and one-off integrations that are costly to maintain and support

"Acumatica lets you customize, based on user roles, what screens people can see and what they cannot. Acumatica allows us to focus more on what is good for our business and our process, rather than being stuck with a system and figuring out how to redesign around its process."

- PAUL FORRES, OPERATIONS MANAGER, GLOBAL ASSET

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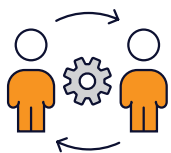
13. LABOR MANAGEMENT
Manage Employees Effectively

It is more challenging than ever to find quality talent making labor a precious resource in today's competitive marketplace. Foster employee relationships with tools to empower employees with information and ensure their success. Acumatica provides a modern user interface with mobility to make onboarding new employees easy – especially for work-from-home employees or younger workers more comfortable with mobile applications. Acumatica is consistently **rated as a top ERP application** for usability by prominent industry analysts and user review sites, including G2, IDC Research, Gartner, Nucleus Research, and more.

Manage employees effectively with flexible employee records, native payroll applications, and connected human capital management systems for recruitment, retention, benefits administration, and separation.

Onboard employees quickly with built-in Wikis to document standard operating procedures and free role-based training through the online Acumatica Open University, which features more than 60 specialized courses maintained for each major product release.

14. CUSTOMER-FIRST APPROACH

An ERP Publisher Who Cares About Your Success

Acumatica is unique among midmarket ERP publishers. First, unlike our peers, Acumatica develops, sells, and supports only one ERP application—Acumatica. That means that every employee is focused on the application you use to run your business. Further, 65% of revenue is reinvested back into the Acumatica product. Second, Acumatica's **Customer Bill of Rights** protects customers with an easy-to-understand End User License Agreement (EULA). It guarantees ERP implementations without hidden fees. The Bill of Rights outlines Acumatica's commitment to consumption-based licensing that does not inhibit growth. It provides sustainable pricing models with limited price increases, deployment choice, and consistent customer service access. Further, it protects customers' access to their data anytime – even if they leave the Acumatica family.

"We use everything and anything in Acumatica to our advantage to keep information centralized. We use the Acumatica Customer Management Suite religiously to track opportunities and leads, and what's going on with a contact, and we love that Acumatica integrates well with the Microsoft Office suite because we are also strong users of Excel, Power BI and Outlook."

- PATRICK MADISON, CFO, KORPACK

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15. WORLD-CLASS CUSTOMER SUPPORT

Minimize Risk with Acumatica Support Services

Your ERP application is the heartbeat of your organization. Unfortunately, when servers crash and applications deadlock, users find themselves locked out of the system, forcing them to conduct business manually without access to vital information. In some cases, your business can come to a screeching halt until the hardware or application issues are resolved. Acumatica's native cloud platform provides a 99.95% uptime with dynamic scalability and multiple database and application security levels to ensure maximum performance while minimizing cyber-attack risks. In addition, enjoy consistent, 24/7 customer support with dual layers of support from Acumatica and certified partners in local and regional markets.

The Acumatica Direct Customer Support program complements the support program provided by Acumatica partners. In addition to the self-help services customers access through the Acumatica Customer Portal, the Acumatica Direct Customer Support program allows customers to choose the right level of support for their Acumatica deployment. Acumatica provides three levels of product support and technical support with varying degrees of assistance to accessing help, technical resources, and troubleshooting information, including direct contact with trained Acumatica product experts.

Specialized Apps and Local Services

Many specialized ERP publishers sell direct and maintain few relationships with independent software vendors (ISVs). As a result, customers using legacy applications are forced to work directly with the publisher across the country or in another part of the world altogether. Further, the limited developer community burdens IT departments with costly customizations and one-off integrations that are difficult to maintain and support.

Acumatica is one of the few midmarket ERP publishers dedicated to an indirect sales and service model. Acumatica has over 340 global partners, including resellers in strategic geographic markets that provide localized consulting, implementation, and support services. Further, the Acumatica Marketplace includes certified applications such as budgeting, human resources, business intelligence, and industry-specific ISV applications for non-profit, rental, property management, professional services, hospitality, and other industries.

Discover Your Potential ROI with the Forrester Total Economic Impact Calculator™

CALCULATE YOUR ROI

ACUMATICA GENERAL BUSINESS EDITION

Best-in-class accounting, budgeting, projects, customer management, and payroll. Gain real-time access to data through included reporting and dashboards delivered to your browser or mobile phone.

A feature-rich accounting suite to track daily financial operations and generate powerful financial statements.

Advanced Financials

Manage all customer interactions, support issues, pricing, returns and more.

Customer Management

Work from anywhere, anytime with iOS and Android mobile applications.

Mobile

Acumatica General Business Edition

Gain greater insights into your organization with robust reporting and analytic tools

Reporting and Dashboards

Easily cut overhead expenses and keep your employees happy with in-house payroll.

Payroll

Project Accounting

Manage budgeting, inventory, change orders, timesheets, billing, and profitability for your projects.

# Prepare Your Organization for Growth with Acumatica General Business Edition

Every organization requires a modern and adaptable ERP platform to connect data from multiple systems for real-time insights and tools to foster customer relationships. Unfortunately, data silos and disjointed workflows create barriers to growth, limiting executives from effectively managing their operations and daily business activities.

Acumatica General Business Edition provides unparalleled breadth across an extensive accounting, sales, project, case, and customer management application suite. Advanced financial features for deferred and recurring revenue, project accounting, contract or policy management, billing, asset depreciation, and payroll provide a holistic system for growing businesses.

Generate high-quality leads and boost sales with exemplary customer support through embedded CRM with case management. Configure Acumatica with extended business applications for commerce, point of sale, construction, manufacturing, and field service. Access certified industry and business applications on the Acumatica Marketplace to create the system of your dreams.

Grow and evolve your business with a scalable, secure, and future-proof cloud platform available on any device, anytime, and anywhere. Leverage Open APIs to connect people, information, processes, equipment, and ideas with modern technologies, including cloud computing, big data and analytics, and artificial intelligence with machine learning.

Set a technology foundation for global connectivity with multilingual translations, localized business practices, multicurrency, and international accounting and tax support. Empower employees with a modern ERP application that is easy to use, easy to learn, and adaptable to their specific roles.
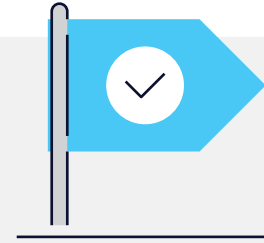
"Acumatica's user-friendly system is going to be a whole new world for us and save us a ton of money on training. Conservatively, we're looking at an increase of $600,000 in EBITDA profitability, once all of the suites are implemented. That's massive."

– JOY GENDUSA, CEO
  POSTCARD MANIA

Acumatica
The Cloud ERP

Acumatica Cloud ERP is a comprehensive business management solution that was born in the cloud and built for more connected, collaborative ways of working. Designed explicitly to enable small and mid-market companies to thrive in today's digital economy, Acumatica's flexible solution, customer-friendly business practices, and industry-specific functionality help growing businesses adapt to fast-moving markets and take control of their future.

For more information on Acumatica, visit www.acumatica.com or follow us on LinkedIn.