Acumatica
The Cloud ERP

The ABCs of Why You Should Go with Acumatica

Acumatica Approach

Quality Material Handling
Acumatica Customer

The Acumatica Story

Cloud-ERP born in this century

- The company founders were steeped in business technology expertise with ERP in their DNA

At its inception in 2008, the company made three bold bets:

1. Acumatica focused on addressing the needs of small and midsized businesses – to build capabilities and drive innovations that help organizations scale and grow.
2. Acumatica pursued a channel model – relying on partners with specialized expertise to focus on sales and deployment, freeing Acumatica to invest in product development.
3. Acumatica was born in the cloud -- disrupting the market with 'modern ERP' to meet today's challenges

Acumatica
The Cloud ERP

Small and Medium Businesses

>32M
Businesses <500 Employees

2/3
New Jobs

>43%
U.S. GDP

50%
More Effective with Patents

Acumatica
The Cloud **ERP**

Cloud Driven Transformation

Analog business

Siloed systems

Connected systems

Modern technology

Digital business

Connected Business. **Delivered**
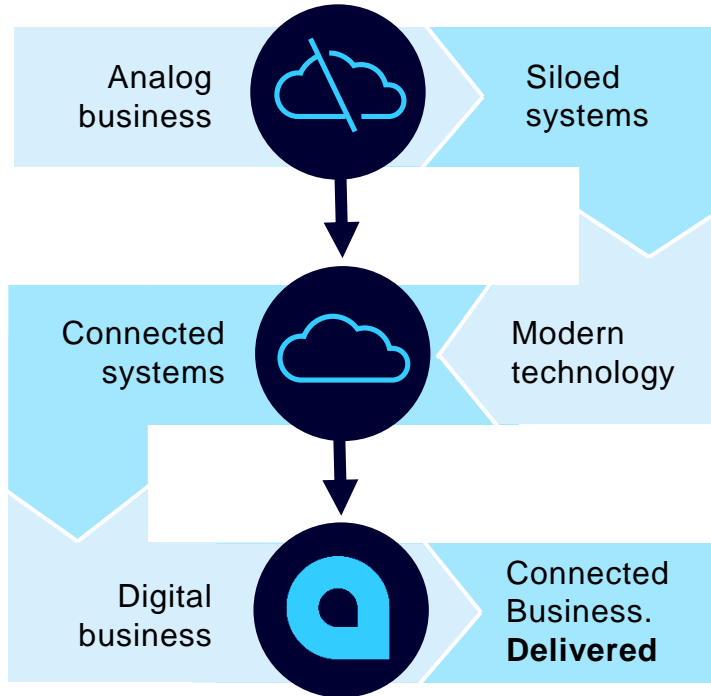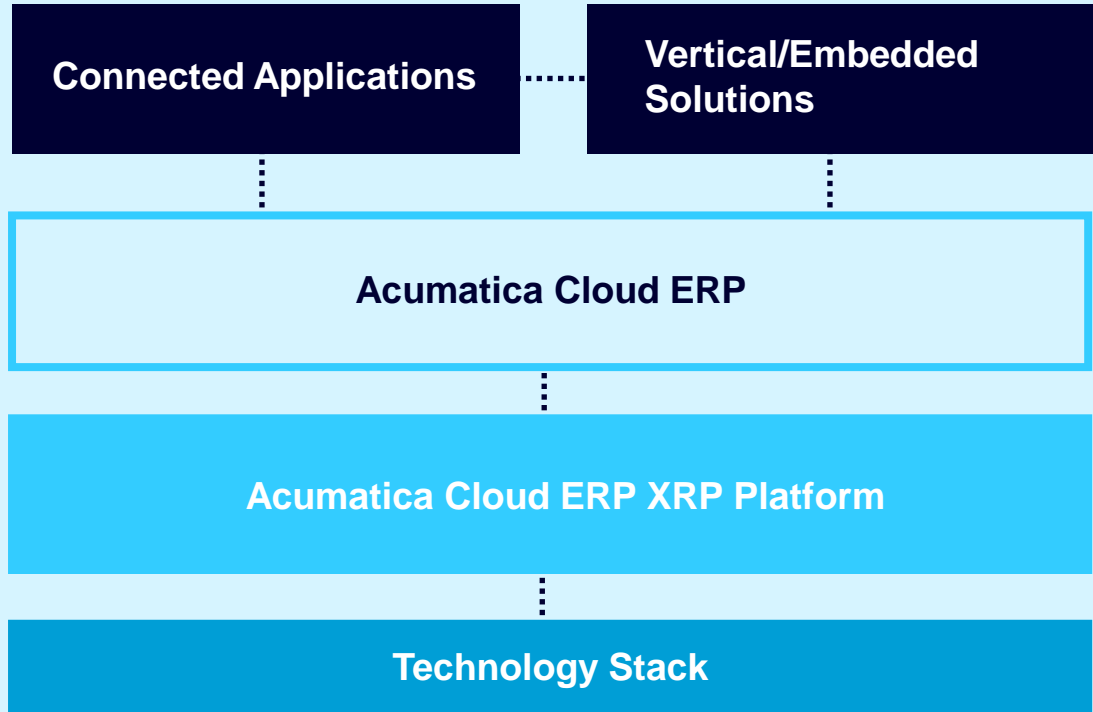
The Transformed Business

- People and processes connected in efficient workflows

- Information centralized and accessible

- Data that is actionable so decisions can be made anywhere, anytime

The Cloud enables Acumatica to deliver:

1. **High availability:** The system is always up and running.

2. **Remote Collaboration:** A connected solution built for working together.

3. **Mobility:** Access from anywhere, on any device.

4. **Security:** A complete security model with the most secure infrastructure provider.

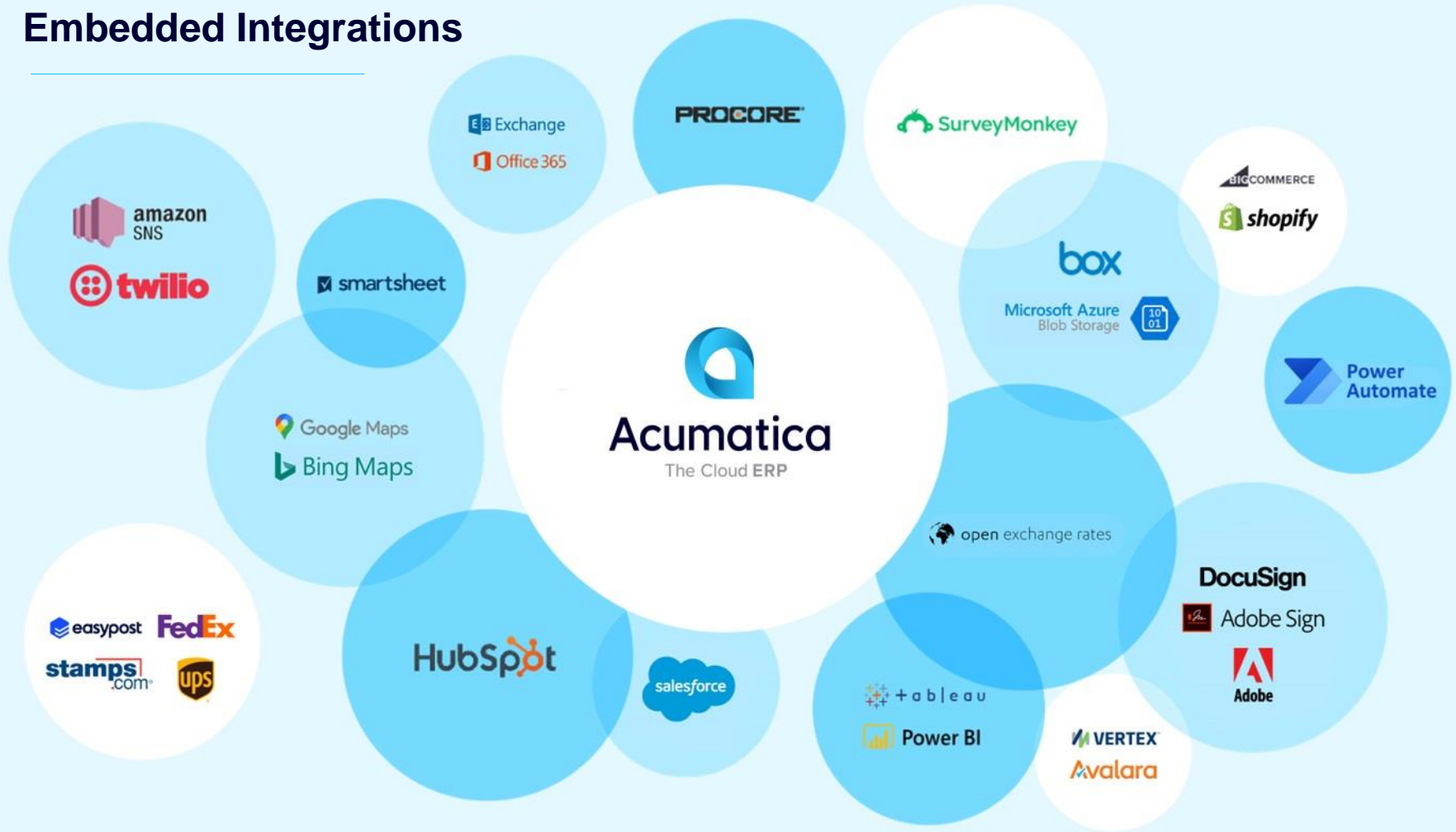5. **Open standards:** To manage change and control your future.

Acumatica Platform

Connected Applications · · · · · · Vertical/Embedded Solutions

Acumatica Cloud ERP

Acumatica Cloud ERP XRP Platform

Technology Stack

A powerful and flexible open platform that can easily extend and connect to other systems opening new possibilities for ERP

Embedded Integrations

Complete Security and High Availability

- Enterprise-grade security features such as server-side logic, detailed access controls, and robust authentication are built in.

- Complete model for all aspects of the applications, data, reports and devices.

- The system is always up and available with automated backups and multi-zone disaster recovery.

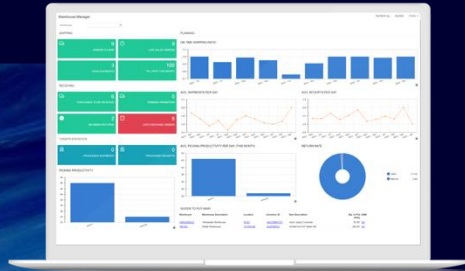- Built on the world's most secure infrastructure provider.

Remote Access

- Access from anywhere on any device in natural language –optimized for collaboration.

AI and Machine Learning

- Adaptable platform with open APIs enabling easy integration of the latest AI and machine learning technologies.

Customer-focused

SAM
Acumatica Customer

Customer Bill of Rights

Upholding these rights is core to who Acumatica is as a company and what we stand for as a community.

1
A software and services proposal with **clear fee structures**, and no surprises

2
Unlimited user access without having to purchase user licenses

3
Fully adapt and **customize** the solution to meet your evolving business requirements

4
Transparent, fair pricing and agreements **without long term commitments**

5
Deploy the solution on a **public or private cloud**

6
An open platform with **robust APIs** to rapidly integrate your other systems

7
A complete **security model** that covers your application access, data, reports, and devices

8
Own and access your data, now and always – in full, **usable data formats**

9
Take advantage of all knowledge and resources developed across a **broad community** of employees, partners, and customers

10
Professional online training that is free and comprehensive

Licensing that is growth-friendly and flexible

Unlimited users:
Includes all
employees, not just
a few

No per-user fees:
extends to key
partners, customers

Flexible: choose ERP-
as-a-service
or customer-managed
deployment in a public
or private cloud

Acumatica
The Cloud ERP

When Customers Speak, Acumatica Listens

Customer-driven innovation:
Acumatica's product roadmap is guided by customer input from numerous channels – including industry user groups, customer advisory councils, focus groups, customer visits, and feature voting -- to inform decisions on new product innovations.

Acumatica Training / Open University

Professional online training that is free and comprehensive – in a user-friendly, dynamic learning environment with easily accessible documentation.
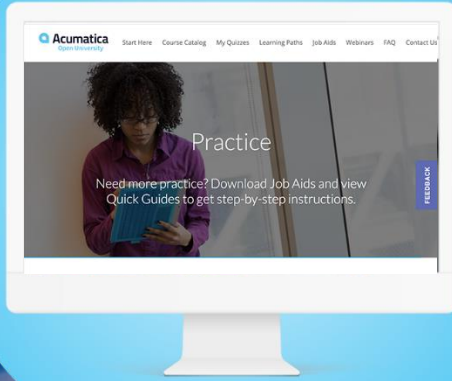
Community

- **Customers** sharing best practices and experiences

- **Partners** providing technical and business expertise

- **Developers** evolving the product

- **Acumatica employees** focusing on customer success

Supported through a **Community portal**
with 16k members, 40k posts and 1.5M
logins in 2022

AcumatiCares

Acumatica passionately pursues efforts to protect the natural environment and make the world a better, more inclusive place.

Workplace Diversity

Responsible Consumption and Production

Climate Action

Scalability and Satisfaction

10k+
Customers

270
Global ISVs

+32
Net Promoter Score (NPS)

$250B
Dollars transacted per year in system

Fastest Growing Cloud ERP Company over Past 8 Years

Acumatica
The Cloud ERP

18

Industry Recognition

- **Acumatica is consistently recognized by analysts and customers for its industry leadership in product quality, usability and satisfaction**

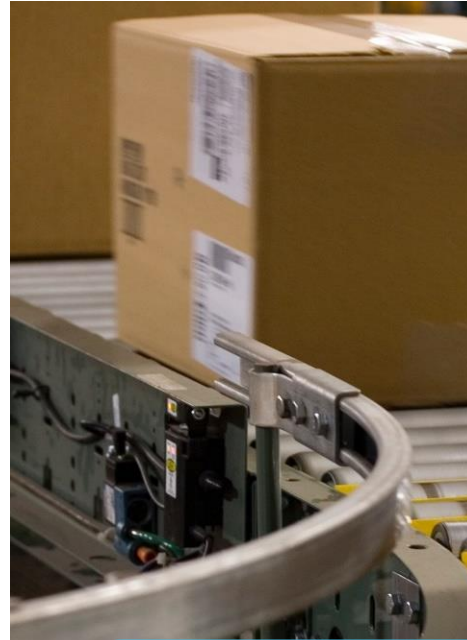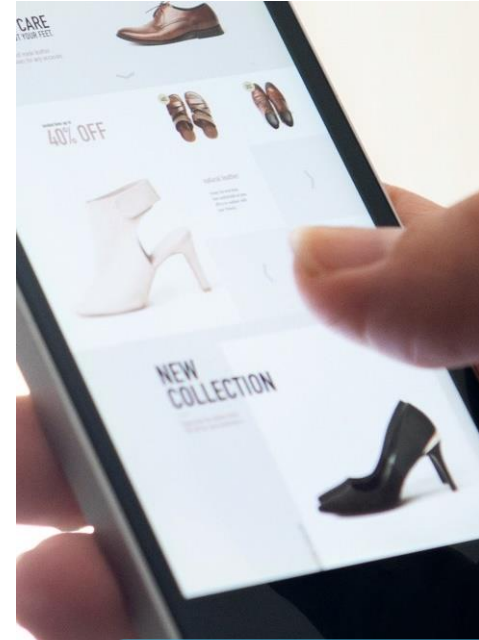# Delivering Industry Functionality

Industry Editions

Manufacturing Edition

Construction Edition

Distribution Edition

Retail Edition

Your Success is Our Mission

Cherry Lake Tree Farm
Acumatica Customer

Alpha Insulation & Waterproofing reduces 1.5 days of manual calculations to 10 minutes with Acumatica

Overview

When it was acquired by a public company, Alpha Insulation & Waterproofing Inc.'s legacy software needed to be replaced, and its manual processes needed to be automated and streamlined. As a result, Alpha implemented Acumatica Construction Edition, gaining a SOX-compliant construction solution with real-time data access in the field and flexible self-service reporting. Further, Acumatica users can quickly generate WIP or Work-in-Progress reports.

> " *In my opinion, there isn't a better product out there for a specialty construction subcontractor than Acumatica's Construction Edition.*
>
> **—Scott Lyons**
> Chief Financial Officer

Challenges

- Running the public company division on an unreliable system that crashed often was proving challenging and created many manual processes
- Needed a SOX Compliant solution for ease of reporting
- Needed a cloud-based solution that provided for AIA invoicing and daily field reports that could be accessed remotely
- Financial reporting and ease of getting information required the small accounting team's expertise and so they were interrupted to answer questions from the field and needed more time for value-added work vs. repetitive work
- CMiC Switch – In depth evaluation with a consultant leading a discovery cycle who advised Acumatica Construction Edition was the best fit

Key Results

- Implemented an integrated, cloud-based construction solution with real-time task views, AIA reporting and billing, compliance management, daily field reports, and certified payroll
- Established a SOX compliant system, making it faster and easier to comply with public company requirements
- Automated WIP calculations, reducing 1.5 days of manual calculations to 10 minutes
- Eliminated status calls and inquiries from the field with self-service from construction sites saving considerable time
- Deployed an easy-to-use business solution tailored to the specialty contractor industry, expediting user adoption
- Accessed a flexible and scalable business platform paving the way for future growth

Alpha Insulation & Waterproofing Inc.
www.alphaiwp.com

Industry

Construction: Commercial Insulation and Waterproofing installer

Location

Headquarters: Columbus, OH with multiple locations serving markets in the Southeastern and South-Central U.S.

Products

Acumatica Construction Edition with:

- Advanced Financial Management
- Expense Management
- Inventory Management
- Warehouse Management
- AP Document Recognition
- Velixo
- DocLink Document Management Solution

Customer Social Sharing Details

Customer Success Story Details

Customer Success Story | Reference Reel

American Meadows achieves 75%+ YoY sales growth with Acumatica.

Overview

Since 1981, American Meadows (AMI) has been a popular online retailer of wildflower seeds, perennial plants, flower bulbs, and vegetable seeds to consumers and corporations in North America. When the Vermont-based company outgrew its legacy software, it deployed Acumatica Cloud ERP gaining one integrated solution, a solid foundation for growth, and the ability to pivot to work from home effortlessly when the pandemic hit.

> " *In the end, I struggled to find people who raved about Oracle NetSuite. Most people I talked with were just okay with it, but very few spoke to how it had radically transformed their business for the better.*
>
> **— Ethan Platt**
> President

Challenges

- Running the business from various locations on its legacy standalone system was cumbersome and provided little to no visibility to real-time data
- Needed a solutions that could keep up with the pace of the company's growth, especially in times of seasonal high demands that necessitate the ability to scale quickly
- Needed more sophisticated dashboard and financials reporting from a fully integrated ERP solution and online store.
- Needed mobile access to information for geographically dispersed employees
- Oracle NetSuite Compete – In depth evaluation & discovery cycle until Acumatica was introduced

Key Results

- Eliminated duplicate entry into multiple systems, saving employees time and reducing errors
- Gained a single solution to operate the business, unifying operations
- Acquired accurate and real-time data with a fully integrated ERP solution and online store
- Leveraged dashboard reporting for improved insights into financials & operations
- Increased customer satisfaction with greater transparency into the end-to-end ordering process

AMERICAN MEADOWS

WHERE CONFIDENCE GROWS

America Meadows
https://www.americanmeadows.com/

Industry
eCommerce, Online Retailer, Agriculture: Gardening and Planting Supplier

Location
Headquarters in Burlington, VT with additional growing facilities in Utah

Number of Employees
Approx. 50 full time employees, with 25 added seasonally

Products
Acumatica Commerce Edition with:

- Advanced Financials
- CRM
- Magento Commerce/Acumatica Connector
- Bronto, Starship, and Vertex

Customer Social Sharing Details

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Customer Success Story Details

Customer Success Story | VIDEO Success Story Reference Reel

Carlson-LaVine cuts payroll processing time nearly 100%, from 1.5 days to just 10 minutes

Overview

Competing against the biggest names in construction nationally, Carlson-LaVine Inc. carved out a successful strategy leveraging technology and a nimble, lean staff to deliver work of the highest quality in several key segments. But Matt Shamp, executive director, knew that to remain competitive and grow, the construction firm needed to replace its legacy Sage system. Carlson-LaVine deployed Acumatica Construction Edition gaining a powerful, easy-to-use cloud platform that streamlined operations, helped the business grow, and helped employees thrive.

> " *With Acumatica, I'm giving employees an ultra-efficient tool they need to do their jobs correctly and allowing them to do things easier. I'm handing them a smartphone versus a rotary phone. They are more well-equipped to do their jobs, which produces good outcomes for customers and helps us build the business.*
>
> **—Matthew Shamp**
> Executive Director

Challenges

- Running the growing construction firm on a legacy Sage 300 CRE system was holding the business back
- Manual and laborious processes in place caused headaches and frustration
- Needed a tool that had open API or a native integration to Procore
- Needed a cloud-based solution that users could access remotely
- Need for better financial reporting and to eliminate duplicate processes in areas such as billing
- Viewpoint and Sage Intacct compete – In-depth evaluation & discovery cycle until Acumatica was introduced

Key Results

- Acquired an integrated, cloud-based solution, automating processes
- Equipped employees with a modern tool, increasing productivity and gaining an edge in recruiting new staff
- Gained an easy-to-use solution, reducing time to train new employees and speeding adoption by veteran employees
- Cut payroll processing time by nearly 100 percent, from 1.5 days to just 10 minutes
- Eliminated extra processing steps, streamlining operations, and saving time
- Improved customer communications, providing more timely information to customers, unions, and subcontractors
- Provided a connected platform for continued growth, allowing it to better compete with larger construction firms

CARLSON LaVINE

Carlson-LaVine Inc.
www.carlsonlavine.com

Industry
Construction

Location
Minneapolis, MN

Number of Employees
45 full time employees

Products
Acumatica Construction Edition with:
- Procore Integration
- Acumatica Payroll

Customer Social Sharing Details

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Customer Success Story Details
Customer Success Story | VIDEO Success Story
Reference Reel | Webinar Highlight Reel

Clive Coffee ship products 50% faster with Acumatica

CLIVE COFFEE

Overview

Espresso and coffee-enthusiast Clive Coffee took the home barista experience to the next level when its online sales business grew during the pandemic, and it added a subscription service and an educational component. But it soon became obvious that they couldn't use QuickBooks, a separate eCommerce system, and order processing with inventory and go through the manual rotations needed to consolidate all the data. So, Clive Coffee implemented Acumatica Cloud ERP, gaining a single integrated platform that provides real-time financial visibility, increased inventory accuracy, and helps Clive continue in its mission to guide its clients in their pursuit of great espresso, design, and quality that lasts.

> " *When we switched to Acumatica, it really created a seamless experience for our consumer, because our data accuracy, our inventory, and the way we communicated with our customers was in one spot and created a single source of truth.*
>
> **—Emily Sloan**
> Director of Marketing (prior)

Challenges

- The growing business and high transaction volume became too much for QuickBooks to handle
- Supply chain management and inventory management became troublesome with separate systems
- Needed a cloud-based solution that would eliminate hiring IT staff and server costs and one users to access on the go
- Financial reporting required manual reconciliations that took a lot of finance staff's time
- Oracle NetSuite Compete – In depth evaluation & discovery cycle until Acumatica was introduced

Key Results

- Acquired a single, integrated, cloud-based solution, eliminating manual reconciliation processes
- Provided instant and accurate financial reporting, improving decision making
- Gained deep and connected data transparency, streamlining operations
- Avoided hiring additional staff in finance, scaling transaction volume more efficiently
- Improved the customer experience, shipping products 50 percent faster, exceeding consumer expectations
- Obtained a connected platform for growth that can scale rapidly as the business continues to evolve

Clive Espresso
www.clivecoffee.com

Industry
eCommerce: Online Retailer

Location
Headquarters in Portland, OR, with warehouse operations in Nashville, TN

Number of Employees
Approx. 45 full time employees

Products
Acumatica Retail-Commerce Edition with:
- Native Shopify Connector
- Advanced Financials with Multiple Currencies
- Warehouse Management
- Field Service Management
- AcuSync – Bank Feeds & Expense Receipts

Customer Social Sharing Details

Customer Success Story Details
Customer Success Story | VIDEO Success Story Reference Reel |Webinar Highlight Reel

General Contractor replaced siloed applications with Acumatica, saved 30% of work time.

Overview

General Contractor, Curran Young Construction, makes running a highly efficient company a top priority. Rather than installing a traditional suite of siloed construction software packages, they implemented Acumatica Construction Edition, a modern construction solution with the mobility, scalability and flexibility they wanted for their innovative firm.

Challenges

- Need for a financial package which would also integrate well with Procore Construction Management
- Need for a way to control costs as the company grows
- Need for a way to manage the business operations through the use of a mobile app since much of the time is spent on a job site

Key Results

- Gained enterprise-scale financial functionality/avoided costly on-premises server technology investment
- Gained 30 percent more time working in one tool as opposed to three siloed applications
- Avoided future software costs associated with headcount growth because of unlimited user licensing
- Gained integration with modern construction applications such as Procore Management Software and other third-party applications

> " Once we made the decision to go cloud, other software couldn't compare to Acumatica's Construction Edition.
>
> **—Bruce Young**
> President & Co-Founder

Curran Young Construction
https://www.curranyoung.com/

Industry
Construction

Location
Bonita Springs, FL

Products
Acumatica Construction Edition with:
- Advanced Financial management
- Job Cost accounting
- Order Management
- Construction retainage, cost codes and compliance
- Smartsheet integration

Customer Social Sharing Details

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Customer Success Story Details
Customer Success Story | VIDEO Success Story Reference Reel

Acumatica helps lighting manufacturer cut invoicing time by 99%

Overview

FSC Lighting Inc. began as a fluorescent lighting manufacturer later expanding to include LED lighting with emphasis on controls, automation and energy efficiency. Projects range from for commercial, industrial and public sector projects. To benefit the local economy and surrounding community, FSC's 30-person manufacturing operation is supported onsite by 10 adults with developmental disabilities and up to 200 offsite from Pomona Valley Workshop. For decades, the company ran on tribal knowledge and Sage DacEasy, which wasn't set up properly, lacked accountability and couldn't scale as the company grew. FSC Lighting chose Acumatica for its flexible, scalable, cloud-based ERP and excellent value.

> " The idea of being handcuffed to tribal knowledge is disappearing. Acumatica and the processes we are developing are helping us double our sales without doubling our staff.
>
> **—Chad Treadwell**
> VP, Operations

Challenges

- Ran company on tribal knowledge and Sage DacEasy
- Frustrated with system's lack of accountability and inability to scale
- Needed a platform for growth
- Needed better inventory management
- Needed integration with third-party solutions

Key Results

- Confidence in true and accurate inventory
- Cut invoicing from 5 days to 20 minutes
- Automated order entry and management
- Easy, straightforward reporting
- Ability to easily scale with company growth

FSC Lighting

http://www.fsclighting.com

Industry

Manufacturing

Location

Rancho Cucamonga, CA

Products

Acumatica Manufacturing Edition with:

- Advanced Financial management
- Order Management
- Inventory Control
- BOM, MRP and production management

Customer Social Sharing Details

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Customer Success Story Details

Customer Success Story | VIDEO Success Story Reference Reel

Award-Winning Digital Media Firm Shaved 26 Days off their Month-End Close with Acumatica

INCUBETA

Overview

The global digital media firm Incubeta Group continues to grow exponentially, recording a 20-fold growth rate in seven years. With acquisitions propelling most of their international growth, the South African-founded firm found itself navigating four legacy financial systems, 10 currencies, and a hodgepodge of disparate business support applications. The disjoined systems made obtaining a clear, accurate financial picture of the business nearly impossible. Incubeta deployed Acumatica Cloud ERP to gain real-time visibility into finances across all its branches, support and consolidate multiple currencies, and scale easily to integrate new acquisitions.

> "
> *Since our implementation of Acumatica, we have acquired two businesses. We brought them on very quickly into our accounting structure, allowing us to visualize reporting, which was a massive benefit for us.*
>
> **—Sean Reuben**
> CFO

Challenges

- Running growing global operations on a variety of legacy systems was holding the business back
- Growing currency requirements were difficult to manage across four financial packages
- Needed a cloud-based solution that users could access remotely
- Visibility into financial reporting was limited and very manual, excel-based with the old systems

Key Results

- Gained a single connected solution, allowing it to seamlessly add acquisitions and grow
- Improved visibility, gaining a true picture of global operations
- Standardized financials, gaining deeper insight into 17 global offices
- Lowered technology budget, shifting IT to a third party and eliminating the need to maintain IT infrastructure
- Provided the ability to work from anywhere, improving productivity
- Reduced monthly close from seven weeks to 9 days, saving time and resources
- Accelerated training and increased user adoption with the easy-to-use, intuitive solution
- Cut paper and printer costs by eliminating the need to process and print invoices

Incubeta

www.incubeta.com

Industry

Professional Services: Digital Media, Advertising & Marketing Services

Location

17 Global Locations with head offices in South Africa, the U.K., and the Netherlands
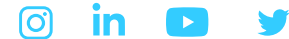
Number of Employees

500 full time employees

Products

Acumatica General Business Edition with:

- Advanced Financial Management
- Fixed Assets
- Project Accounting
- Inter-Company Accounting
- Inventory Management

Customer Social Sharing Details

Customer Success Story Details

Customer Success Story | VIDEO Success Story
Reference Reel

Oil and Gas Startup ISS Operational in 6 Months with Acumatica Cloud ERP

Overview

On January 31, 2020, a private equity (PE) group acquired a carved-out business unit in the energy services industry and set goals of at least tripling the company's size by year 5. The CEO, James Craig, faced an aggressive deadline to stand up the newly formed company, Industrial Specialty Services (ISS), from scratch while generating $40 million in annual revenue and supporting more than 200 employees. He needed to form his management team, hire personnel, and establish the entire back office while also setting up the network infrastructure. Craig brought on an adept team consisting of Acumatica Inc., BDO Digital, and NexTec Group, which deployed Acumatica ERP and set up mature internal systems all while working through the COVID-19 pandemic and Hurricane Hanna beating its deadline.

> " *The ease in which Acumatica works and how it looks and feels compared to Microsoft Dynamics, Sage, and Oracle NetSuite, there's not a whole lot of comparison. Acumatica leads the pack.*
>
> **—James Craig**
> CEO (prior)

Challenges

- Scalability: ISS as a business carve-out needed IT solutions to run their business from the beginning that would scale for rapid growth
- Low TCO (Total Cost of Ownership) and high ROI (return on investment): The delivery of solution needed to be cost-effective and efficient to enable dedication of resources to grow the business
- Strategic focus: The company's growth strategy had set a goal to double in size by the end of year 1 through the acquisition of 2 companies. As a start-up, the company was interested in leveraging technology and partner relationships as enablers for rapid control, growth, and business optimization.
- Needed a cloud-based solution that its more than 200 employees could access remotely since they work on client sites

Key Results

- Gained timely control and visibility of business performance through a centralized ERP and collaboration platform
- Gained operational efficiencies through the user adoption of end-to-end automated processes
- Minimized IT infrastructure investments by leveraging the cloud for voice, data, and business application services
- Outsourced IT to BDO Digital, enabling access to subject matter expertise and sustainable support services
- Acquired a scalable IT platform supporting rapid growth
- Lowered overall salaries and wages costs by eliminating the need to hire IT resources
- Reduced the total cost of ownership while achieving high ROI

ISS
INDUSTRIAL SPECIALTY SERVICES USA

Industrial Specialty Services USA LLC
www.isservices.com

Industry
Oil & Gas: Technical Engineered Services

Location
United States

Number of Employees
Approx. 250 Full-time Employees

Products
Acumatica Distribution with:

- Advanced Financial Management
- Intercompany Accounting
- Fixed Assets
- Warehouse Management
- Project Accounting
- CRM
- Expense Management

Customer Social Sharing Details

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Customer Success Story Details
Customer Success Story | VIDEO Success Story
Reference Reel

Media and Technology Giant, Gains Real-Time Data Insights, Grows 70% with Acumatica Cloud ERP

Overview

Key Code Media realized its legacy Sage financial system could no longer support its needs when selling to enterprise customers, which needed lengthy quote sheets and increased the firm's transaction volumes. Key Code Media switched to Acumatica Cloud ERP and successfully integrated two Key Media acquisitions that increased its size by 70 percent. The power and flexibility of Acumatica enabled the company to instantly support remote work when the pandemic hit while delivering the project accounting, CRM, and connectivity the company needed to support its rapid growth.

> " We only have eight hours a day and need to scale the business, so we must ensure we use our time well. With Acumatica, rather than spending that time inputting data, we use our talent to analyze data and make more strategic decisions
>
> **—Ka Ma Chan**
> CFO

Challenges

- Legacy on-premises Sage 100 & other systems and old hardware often crashed
- Staff did not have access when away from the office or battled poor VPN
- Pandemic accelerated the demand for its services, business pivot to support larger corporate customers which came with unique requirements and quoting/invoicing needs that relied on manual input
- Needed a cloud-based solution that users could access remotely and could automate manual processes
- Financial reporting was limited and very manual with the old system and didn't support project accounting in real-time
- Microsoft Dynamics and Sage Intacct Compete – In-depth evaluation & discovery cycle until Acumatica was introduced

Key Results

- Implemented a single connected solution, providing customer relationship management (CRM), project management, and real-time financial insights
- Acquired project accounting functionality that efficiently managed 300 to 400-plus lines for quoting and real-time project updates
- Automated manual data entry-driven processes and eliminated the need to export data multiple times a day
- Reduced technology infrastructure costs, moving to the cloud
- Supported the seamless acquisition of two companies during a pandemic, enabling Key Code Media to reap 70 percent increases in revenues and staff effortlessly

Key Code Media
www.keycodemedia.com

Industry
Award-Winning Systems Integrator and Reseller for A/V, Broadcast, and Production Equipment Solutions

Location
Burbank, California, with nine offices throughout the U.S.
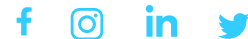
Number of Employees
More than 100 full-time employees

Products
Acumatica General Business Edition with:
- Project Accounting and Ordering Management
- CRM with Outlook Integration
- Microsoft Teams Integration
- Customer Self-Service Portal
- Exchange Integration
- Repay's AR & AP Payments Integration
- Acumatica Premier Support

Customer Social Sharing Details

Customer Success Story Details
Customer Success Story | Reference Reel

Mid-Sized Manufacturer Gains 400% Productivity and Creates Powerful Integrated System with Acumatica

Overview

Panova (formerly AME Corporation) is an ISO 9001: 2008-certified supplier that specializes in custom rubber and plastic components and sealing solutions. Its operations are currently spread across New Jersey, US, and Shanghai, China. Like many companies with a global presence, it wanted to move all its business processes to the cloud, so that any of its 20 staff from around the world could easily access information and collaborate. With Acumatica, the company had already found its ideal ERP solution in 2011. But there was one more gap to fill. AME stored a large amount of its business documents on Box, an online content sharing platform. AME staff had to access Box and Acumatica separately. That is, until Acumatica was rolled out and the two were linked in a powerful integration. Today, this has vastly improved the way Panova staff work.

> " *Acumatica is the backbone of our cloud environment. It has already changed the way we do things, improving efficiency. It will clearly strengthen our company in the long run.*
>
> **—Ehren Dimitry**
> President and CEO

Challenges

- Needed to move all business processes to the cloud, so that worldwide staff can easily access information and collaborate
- Needed to integrate with company's online content sharing platform, Box
- Needed to realize maximum productivity
- Needed to progress toward fully green, paperless environment

Key Results

- 400% productivity gains
- Seamless integration with online content sharing platform, Box
- Improved file access and process efficiency
- Closer to 100% paperless scenario

Panova
https://www.panova.com/

Industry
Manufacturing

Location
New Jersey, US, and Shanghai, China

Products
Acumatica Distribution Edition with:

- Advanced Financial management
- Order Management
- Inventory Control
- Acumatica Fixed Assets Module
- CRM
- Acumatica Studio
- Acumatica-Box integration
- Automated inventory replenishment suggestions

Customer Social Sharing Details

in   f

Customer Success Story Details
Customer Success Story | VIDEO Success Story
Reference Reel

Portacool Shortens month-end close time by 86% with Acumatica Manufacturing Edition

PORTACOOL.
THE HOME OF KUUL™

Overview

Portacool LLC launched its business 30 years ago. With technological and manufacturing expertise, it quickly became an industry leader in the evaporative cooling industry. Operating with a legacy ERP system accompanied by many spreadsheets was not scalable enough to handle the company's rapid growth. Portacool deployed Acumatica Manufacturing Edition to optimize business processes gaining real-time data visibility and manufacturing insights from a single platform for data-driven decisions and streamlined operations.

> " The only way to survive and be successful in this market is to have visibility into the KPIs to drive manufacturing, maintain profitability, drive customer satisfaction and quality. We couldn't have done that without Acumatica.
>
> **—Bill Ferren**
> Director of Information Technology

Challenges

- Company was running on a legacy financial system (ECI Macola) heavily supported by spreadsheets
- No visibility into operations, no data for critical decision-making, lacked inventory insight
- No WMS or Manufacturing system
- No reporting by channel, profitability by SKU, market channel, and customer account
- Lacked the ability to serialize components and completed finished goods, so no way to track costs at a detailed level
- No connection to the Quality Control application
- Need to reduce shipping processing times with 3PL for parcel and freight management

Key Results

- Implemented a single, connected, robust, modern manufacturing platform to expand into new channels
- Gained real-time operational visibility with embedded apps for manufacturing, including data collection/engineering change control
- Created tailored dashboards with real-time production and sales metrics including sales by channel and profitability by SKU, geographic location, and customer account
- Acquired an integrated inventory management solution to automate inventory transactions and warehouse operations
- Attained lot and serialized component and finished goods traceability with detailed manufacturing costs
- Eliminated paper with digital document management in a secure and connected ERP database
- Reduced month-end close by 86 percent
- Eliminated manual inventory counts, reducing time to

Portacool
https://portacool.com

Industry
Manufacturing: Evaporative Cooling Units and Kuul Evaporative Media

Location
Center, Texas with warehouses in Wilmer, Texas, and Rotterdam, The Netherlands, Kuul media manufacturing facility in Malaysia

Number of Employees
Approx. 400 full time

Products
Acumatica Manufacturing Edition with:
- Inventory and Warehouse Management
- Advanced Planning and Scheduling
- Manufacturing Data Collection and Engineering Change Control
- CRM with Outlook Integration and Salesforce Sync
- Case Management
- Customer Self-Service Portal
- Advanced Financial Management with: Fixed Assets Project Accounting, Velixo, Avalara, Native Big Commerce Connector, Dataself, Pacejet Shipping, and SPS Commerce Fulfillment (EDI)

Customer Social Sharing Details

Customer Success Story Details
Customer Success Story | VIDEO Success Story Reference Reel

Canadian Railway Firm Saved 25% of their Time with Acumatica

Overview

Over the past 14 years, Canadian railway service provider REMCAN Projects grew from its four founding members to a national player across Canada. Its legacy Sage financial software and disconnected software packages required a massive amount of manual work and stymied company growth. REMCAN deployed Acumatica Construction Edition, which streamlined operations, automated manual work, and gave the field services team access to critical data from anywhere.

> " *After spending significant time re-developing our chart of accounts and reporting structure for Acumatica, we're now able to run reports and analyze data in a much more meaningful way to support our strategic decision making.*
>
> **—Andrea Deakove**
> Project Lead

Challenges

- Running the growing business financial processes on a legacy platform were stretching the system to its limits
- Growing billing requirements were difficult to manage – ex. a 200 page fuel bill took three to five days of manual entry
- Needed a cloud-based solution that field service users could access remotely
- Financial reporting was limited and very manual with the old system and took too long for month end close ~15 days
- Sage 50 switch – Sage 300 & Eclipse by Epicor compete via in depth evaluation & discovery cycle until Acumatica was introduced

Key Results

- Connected disparate financial systems into one integrated solution, streamlining operations
- Provided field services team robust mobile app functionality, increasing the speed of data capture
- Avoided hiring additional accounting staff as transactions grew, keeping employee count stable
- Returned 25 percent of accounting clerks time to complete more strategic finance initiatives
- Closed financial statements in a third of the time, closing in only 5 days rather than 15
- Shortened time to deploy new technology, rolling out new business entity in just 6 weeks
- Gained a single, flexible platform enabling future growth
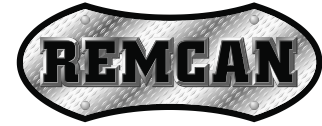
Remcan Projects
www.remcanprojects.com

Industry
Construction: National Railway Service Provider

Location
Langley, BC Canada

Products
Acumatica Construction Edition with

- Advanced Financial Management
- Multiple Currencies,
- Contracts Management
- Fixed Assets
- Inventory Control

Customer Social Sharing Details

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Customer Success Story Details
Customer Success Story | Reference Reel

Saddleback Leather Increases Sales, Saves $1 million+ with Acumatica

Overview

Tired of needing 14 developers just to run Oracle NetSuite and being unable to fully connect that software to their online store, Saddleback Leather dismissed NetSuite and implemented Acumatica. Saddleback gained 10 times the functionality at a third of the cost and easily connected its online store to the new cloud-based software, dramatically boosting online traffic and sales.

> "
> *I had a million ideas but all of them were impossible with Oracle NetSuite. Now, I sleep, dream and hope - three things I was not able to do with NetSuite.*
>
> **—Dave Munson**
> Founder & CEO

Challenges

- Ran operations with several software packages, which were troublesome to integrate (including Oracle NetSuite)
- Maintained in-house IT dev team of 14 just to make Oracle NetSuite work
- Needed fully integrated solution that could handle e-commerce, finance, inventory, marketing without the need for a lot of customization
- New ERP needed to easily scale as company grew

Key Results

- 33 percent lower cost than Oracle NetSuite with 10 times the functionality
- $750,000 savings in IT costs
- 45 percent Increased Organic traffic
- Connected easily to third party software including Big Commerce, ShipStation
- Up-leveled marketing activity with new functionality
- Improved visibility into financial data with real-time access
- Gained remote access to the ERP, boosting productivity

Saddleback Leather Co.
https://saddlebackleather.com/

Industry
e-Commerce & Retail, Manufacturing

Location
Headquarters in Fort Worth, Texas, with manufacturing in Leon, Mexico

Products
Acumatica Retail Commerce Edition with:
- Financial management
- Order Management
- Inventory Control
- Native Big Commerce Connector
- Acumatica Intercompany Accounting
- ShipStation
- NETSTOCK
- ChannelAdvisor

Customer Social Sharing Details

Customer Success Story Details
Customer Success Story | VIDEO Success Story
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