

# **Growth Control With Acumatica**



Firms are competing with new companies, channels, and ways of doing business every day—and the challenges are expanding.

Small to mid-sized businesses (SMB) face many of these obstacles, plus they have the disadvantage of competing against large competitors. These big companies can dedicate executives, teams, facilities, equipment, and systems to manage the challenges. But Acumatica ERP software is designed to equip SMB companies to compete and operate cost-effectively in today's market.

Acumatica has the broad functionality and true cloud technology for agile business, giving real-time visibility to your sales, services and operations on phones, tablets and computers in your facilities or on the road with customers and suppliers.

# SALES AND CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

# Capture opportunities and manage sales

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Leads to opportunities: track deals from start to closing

**Product Configurator:** provide features and options for product families

**Custom products and services:** adapt designs to customer needs

Projects: manage large, multi-site programs

**Estimates:** accurately quote complex proposals

Capable to Promise: commit to delivery



### based on capacity and materials

## **ORDER MANAGEMENT**



# **Consolidate and process orders in Acumatica from a wide range of sources**

**Phone:** quickly identify customer items, price and availability

**E-mail:** enter data from emails and attached spreadsheets

**Product Configurator:** process customer configurations to work orders

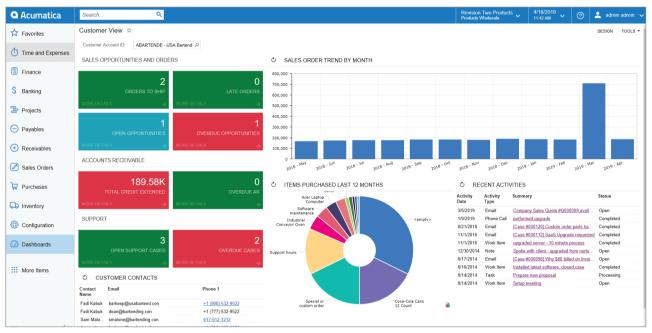
**EDI:** automatically process orders and shipping notices

**Projects:** convert quotes to work orders with all details

Business-to-business (B2B) website: give self-service business customers secure portal access

**Business-to-consumer (B2C) website:** create special catalogs and pricing for personal shopping

**Field sales:** sales and service staff enter POs on phones and tablets



CUSTOMER VIEW

# **INVENTORY AND PLANNING**

# Allocate and optimize product across multiple plants and warehouses



**Forecasting:** view current sales and purchasing activity to build business plans

Purchasing: optimize quantities and

locations based on overall demand

PURCHASING MANAGER DASHBOARD



Process orders automatically or individually depending on customer and business needs

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SALES ORDER WORKFLOW

**Stock products:** ship from finished goods at any facility with lot and serial number control

**Non-stock products:** use regular or special locations based on material handling needs

Warehouse Management System (WMS): use fast, mobile scanners for receiving, management, pick, pack and ship

### MANUFACTURING

# Make to stock or order—or combine both order types on your lines

Advanced Planning and Scheduling (APS): use finite scheduling for labor, workstations and tools

Master Production Scheduling (MPS): plan stock component and finished goods production

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Material Requirements Planning (MRP): schedule materials for each location

**Manufacture:** schedule standard and custom products on the same lines

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PRODUCTION DASHBOARD ON PHONE



# INSTALLATION, SERVICE AND WARRANTY

### Grow and manage aftermarket parts and service business

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**Schedule and dispatch:** keep customer needs current and use calendar, GPS and routing features for field staff

**Mobile Service Management:** use tablets and phones for managing parts and services orders, tracking time, documenting calls, etc.

**Equipment maintenance and warranty:** track both equipment and major components by serial number, repairs, replacement history, and warranty costs

**Service contracts:** provide standard and preventive maintenance services

**Construction management:** on new install or replacement projects, contract and manage jobs with construction functionality

# **About Acumatica**

Acumatica Cloud ERP provides the best business management solution for transforming your company to thrive in the new digital economy. Built on a future-proof platform with open architecture for rapid integrations, scalability, and ease of use, Acumatica delivers unparalleled value to small and midmarket organizations. Connected Business. Delivered.



