

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

☆ Favorites Sa ⑦ Time and Expenses Ø □ Finance Ø ▷ Projects Ø	Search Q alesperson ☆ ③ 3 3 MY NEW LEADS NORE DETAILS → 3 3 0 0	Pr ¥	SALE	3/11/2019 3:57 PM ✓ (? 10.49K ES REVENUE	admin admin NEW COMPANY DESIGN TOOLS SALES DEALS
Image: Pavorites Time and Expenses Finance Projects	3 3 MY NEW LEADS NEW LEADS 7+ DAYS NORE DETAILS → 3 3 3 3		SALE		1
Finance Projects	MY NEW LEADS NEW LEADS 7+ DAYS KORE DETAILS → ▲ 3		SALE		1 SALES DEALS
🖻 Projects 🛛 🕻	<mark>ර 3</mark> හි 0				
_			MORE DETAILS		DETAILS ->
	NO CONTACT 14+ NURTURE NO CALL	Ċ	ン MY PIPELINE		
Payables	DAYS 30+ IORE DETAILS →	2	200,000		
+ Receivables		1	150,000 -		_
Sales Orders					
Purchases	⊙ 5 § 1	1	100,000 -		
hventory	MY OPPORTUNITIES CLOSING IN <60 DAYS		50,000 -		
Configuration	<mark>ර 3</mark> හි 0		o	proof prospect	t. Qualification
Dashboards	OPEN NO ACT 30+ NUTURE NO ACT 90+ IORE DETAILS →	¥	f s	0	Qualitie
More Items	D 2 PAST CLOSE DATE			AR PAST DUE	

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

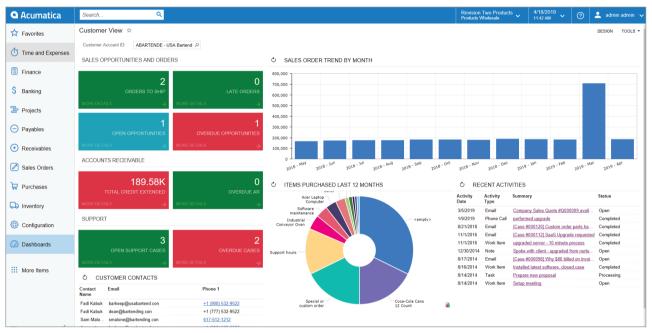
EDI: automatically process orders and shipping notices

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

← → C û 🔒 https III Apps 🛄 Other 🛄 Routi	//presales.acumatica.com/2018r2/(W(3))/Main?CompanyID=MFG&ScreenId=SO2018	000&OrderType=CS			(ti 🖈 🕎 🖸	G Å	0	0 ∃
Acumatica	Search Q				Revision Two HQ 🗸	1/4/2019 2:47 PM	· ?	Adri MFC	min, admin G
🛧 Favorites	Order Types				🗅 NOTES	ACTIVITIES FIL	LES CU	ISTOMIZATION	TOOLS -
1 Data Views	← SAVE & CLOSE 🖬 🗠 + 🗃 🗗 • K K :	> >I							
Finance	* Order Type: Description: Cash Sale								•
Payables	Order Template: CS - Cash Sale								
Receivables	GENERAL SETTINGS TEMPLATE SETTINGS	POSTING SETTINGS							
Sales Orders	* Order Numbering Sequence: ARINVOICE Days To Keep: 0	Use Sales Account from: * Combine Sales Sub. From:	Inventory Item	*					
📜 Purchases	 Hold Orders on Entry Hold Document on Failed Credit Check 	* Freight Account: Use Freight Account from:	40010 - Sales - Freight Customer Location	م •					
, inventory	□ Require Control Total ☑ Bill Separately	* Freight Sub.: * Combine Freight Sub. from:	000-000 - Default						
n Bills of Material	Ship Separately ✓ Calculate Freight	* Discount Account: Use Discount Account from:	49000 - Discount Taken Customer Location	Q					
Production Orders		* Discount Sub.: * Combine Discount Sub. from:	000-000 - Default						
Yaterial Requirem	Recalculate Discount On Partial Shipment Copy Notes		Post Line Discounts Separate Use Discount Sub. from Sales						
Estimating	Copy Attachments Copy Line Notes To Shipment								
More Items	Copy Line Attachments To Shipment								
🚖 Customization	Only Non-Stock Copy Line Attachments To Invoice Only Non-Stock								
	ACCOUNTS RECEIVABLE SETTINGS								
••• <	Allow Production Orders - Hold Allow Estimation								

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

💵 AT&T 🗢		11:13 AM	🕒 🎱 💼	* * 93% 🥅
<	Manufa	cturing D	ashboard	
C PF	RODUCTI	ON IN PRO	DCESS	
Producti Nbr	Custom ID	Start Date	End Date	Qty to Produce
000009		4/7/2017	4/7/2017	1.000000
0000242		10/9/2017	10/9/2017	1.000000
0001604		12/20/2	12/20/2	1.000000
0000001		12/21/2	12/21/2	1.000000
000003		1/10/2017	1/10/2017	1.000000
0000004		4/7/2017	4/7/2017	1.000000
0000010	ABART	1/18/2017	1/18/2017	1.000000
0000016	HUSQV	5/25/2017	5/25/2017	150,00
0000044		6/30/2017	6/30/2017	1,950,0
0000046	ABART	4/19/2017	4/19/2017	1.000000
0000047		11/3/2017	11/3/2017	1.000000

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

Manufacture: schedule standard and custom products on the same lines

~~~ `~~		//~		~ ~ ~ ~ =			
C FORECAST							
nvent D	Descri	Begin Date	End Date	Quanti	UOM		
AAC	Acer	12/21	12/27	100.0	EA		
AMK	Keuri	1/31/	2/27/	100.0	EA		

PRODUCTION DASHBOARD ON PHONE



# INSTALLATION, SERVICE AND WARRANTY

### Grow and manage aftermarket parts and service business

Cancel		^{12 PM} ⓐ ntments	• 🕇 📾 🖇 29	Save
Cancer	Дрроп			
App. Nbr.: 0032	209-1	Est. Duratio	on: 2 h 00	) m
Status: Not Sta	rted	Act. Durati	on: 0 h 00	0 m
Workfl PROC	ESSING	Appointme	nt Total: 20	00.00
Summary	Services	Inventor	y Items	Staf
Service Order Ty MRO — Mair		repair	/iew on N	Мар
and operatio				
Service Order N	br.	-	iniaha (	
003209		F	inishe	
Customer *				
NEPPERSON	IN — NEF	Personne	l Unit	
Location *				
MAIN — Prin	nary Loca	ition		>
Branch *		Branch Loc	ation *	
PRODWHOL Products Wh				>
Project *				
Project * Non-Project	Code.			

**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.



