Acumatica
The Cloud ERP

Acumatica Role-Based ERP Software for Distribution and Retail

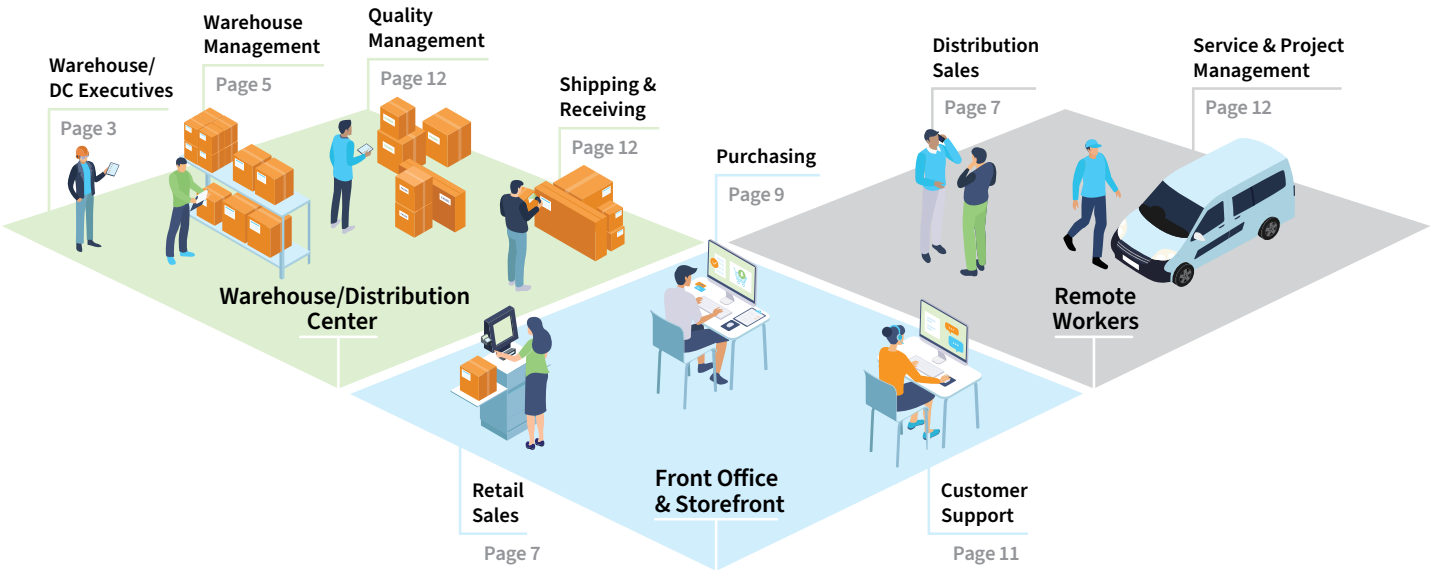
Boost Sales and Improve Customer Lifetime Value with Role-Based Dashboards, Real-Time Data, and Configurable Workflows

Enterprise Resource Planning systems are complicated. Disconnected systems and manual data entry result in untimely and inaccurate information. Employees struggle to get the information they need to make decisions, spot trends, or react to issues as they arise. Distribution and commerce leaders are forced to access multiple systems with outdated reports to gather information to manage daily activities and long-term strategic objectives.

There is a better way. Modern ERP applications like Acumatica empower distribution and retail executives to exceed customer expectations for increased customer lifetime value (CLV) with minimal customer churn, reduced customer acquisition costs, and increased sales to loyal customers.

Gain new insights with a holistic view of your entire business from a single, connected platform. Empower executive leaders with role-based dashboards to strategically monitor the information they need to manage their area of responsibility. Empower employees with configurable workflows to better serve customers.

This playbook explores the world of modern-day ERP applications like Acumatica. It shows how wholesale distributors and retail organizations align information and workflows to drive significant improvements throughout every area of their warehouse and back-office operations.



INTRODUCTION

Streamline Operations with a Modern ERP Platform

Built on a modular and adaptable platform with Open APIs for rapid integration, Acumatica is designed for the way distribution and commerce professionals operate today and in the future. Its flexible architecture allows for low code or no-code customization and added capabilities such as data visualization, artificial intelligence, and machine learning. As a result, all your business processes share the same data, information is available anytime, anywhere, and everything revolves around the customer.

"Upon flipping the switch for go live with Acumatica, we were receiving orders, our trucks were out on the road, all was well; we were drinking champagne."

– CLYDE ATTARD, SALES DIVISIONAL MANAGER, P. CUTAJAR & CO.

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ROLE-BASED SECURITY



Control access to menus, screens, and fields by business entity with flexible user roles.

COLLABORATION TOOLS



Extend Acumatica to customers and vendors with no additional user license fees.

WORKFLOW AND APPROVALS



Create and modify the business process and approvals workflows visually to match the way you do business.

BUSINESS EVENTS



Configure email or text messages with automated activities based on system data. For example, send customers text messages when orders are ready for delivery or pickup or notify warehouse personnel of low stock for open orders.

DOCUMENT MANAGEMENT



Attach documents to transactions and records in the system with flexible search features to find documents when you need them.

MOBILE APPLICATIONS



Access Acumatica using the iOS and Android native app or any web browser on any device. Dedicated mobile apps are provided for CRM, sales orders, project timecards, and more.

ANALYTICS AND REPORTING



Acumatica offers a collection of native reporting, flexible inquiries, insightful dashboards, and powerful analytic resources to make your job easier and more productive.

EMBEDDED EMAIL



Automate customer, vendor, employee, and other email communications without leaving the system.

TIME MANAGEMENT



Capture employee time for payroll, human resources, and costing for field service, project accounting, manufacturing, and other activities.

TASK MANAGEMENT



Create, assign, and manage tasks and activities across departments with ample flexibility and optional project integration.

WIKIS AND DOCUMENTATION



Create a knowledge base of business practices, warehouse procedures, and tips using built-in wikis to empower employees with information.

ACUMATICA UNIVERSITY



Acumatica's Open University is a free internet portal with Acumatica educational resources for everyone interested in the Acumatica product offerings and technology.



DISTRIBUTION AND RETAIL LEADERS

Top distribution and commerce executives, including operations managers, distribution center (DC) general managers, and vice presidents of supply chain operations demand access to information in real-time to manage their businesses strategically. Arm executive leaders with dashboards, alerts and notifications, and reports to understand what is happening across their operations in real-time.

ROLES AND RESPONSIBILITIES

- Supervise daily distribution center activities
- Manage supply chain and warehouse resources
- Work with human resources to manage job descriptions and fill open positions
- Develop and manage operational budgets
- Manage labor resources and conflicts
- Oversee strategic customer and vendor relationships
- Oversee online commerce storefronts, commerce marketing, and retail operations
- Collaborate with IT on system improvement projects
- Develop and implement the operational plan

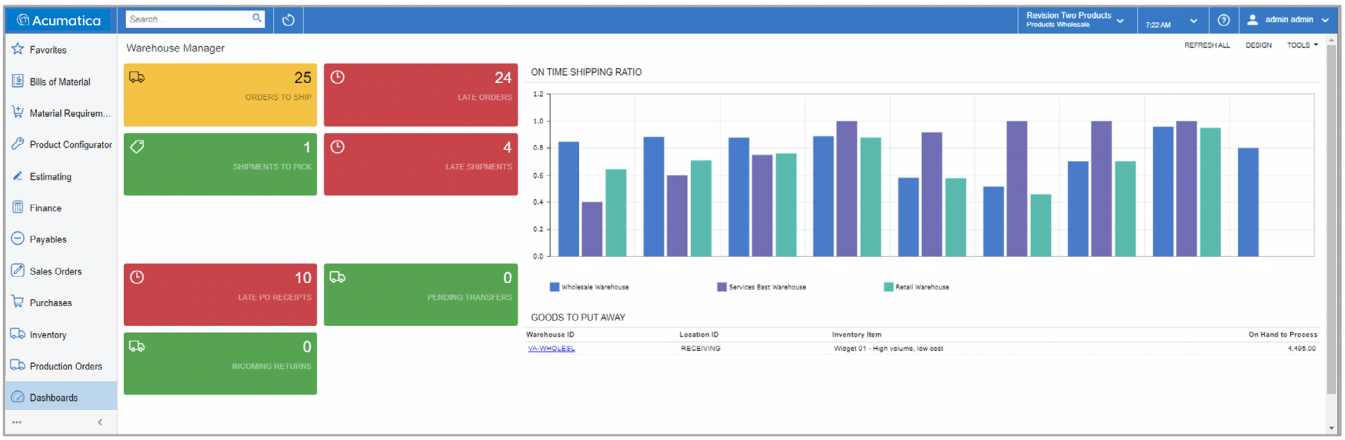
ACUMATICA FOR DISTRIBUTION OPERATIONS

Executive distribution and retail leaders rely on real-time information to streamline operations and balance supply and demand. Know what is happening across your organization with real-time data and automated notifications when situations occur that impact sales, order fulfillment, transportation, logistics, and warehouse operations. Stay connected with mobile applications to approve timecards, purchasing, and requisitions. Manage budgets with detailed views into operational expenses. With Acumatica, you can automate your daily routine, such as picking, packaging, receiving and put-away, and inventory transfers using handheld scanners. The advanced features allow you to optimize your picking using wave and batch strategies.

"Having that stock control is incredible. That's put us at the forefront, especially in the craft beer industry. Now we can track it all; everything we do is in Acumatica. Whatever information we want, we can have it at the click of a button, and that's the key to our success. We know what's in each warehouse and when goods are sold."

– COLIN GILHESPY, CO-OWNER AND MANAGING DIRECTOR, CAVE DIRECT

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Create dashboards to monitor in-house, retail, and commerce storefront orders, spot labor shortages, and identify low stock inventory for planned orders. Drill into data for deeper insights and stay abreast of changes with automated email and text alerts.

MEASURE RESULTS

Make your dashboard your home page to monitor results in real-time. View open orders, drill into warehouse transactions, manage late orders, and keep your pulse on operations with accurate, real-time information.

GAIN INSIGHTS

Connect data from external applications for one source of truth. Harness the power of Generic Inquiries and customize reports without coding to manage operations effectively. Microsoft Power BI provides deep analytics in multiple dimensions for strategic planning.

TRACK BUDGETS AND EXPENSES

Link your budget to your home page with reports to monitor distribution center expenses. Monitor purchase order requisition requests for new equipment and supplies. Track capital expenses with embedded fixed asset management.

MANAGE RELATIONSHIPS

Get a 360-degree view of strategic customers and vendor relationships with native CRM. Access recent communications, look up contacts and addresses, review order history, and see accounting activity from a single, connected application.

IMPLEMENT PROJECTS

Create and manage warehouse improvement projects such as conveyor system implementations or warehouse management initiatives with native project accounting.

STAY CONNECTED

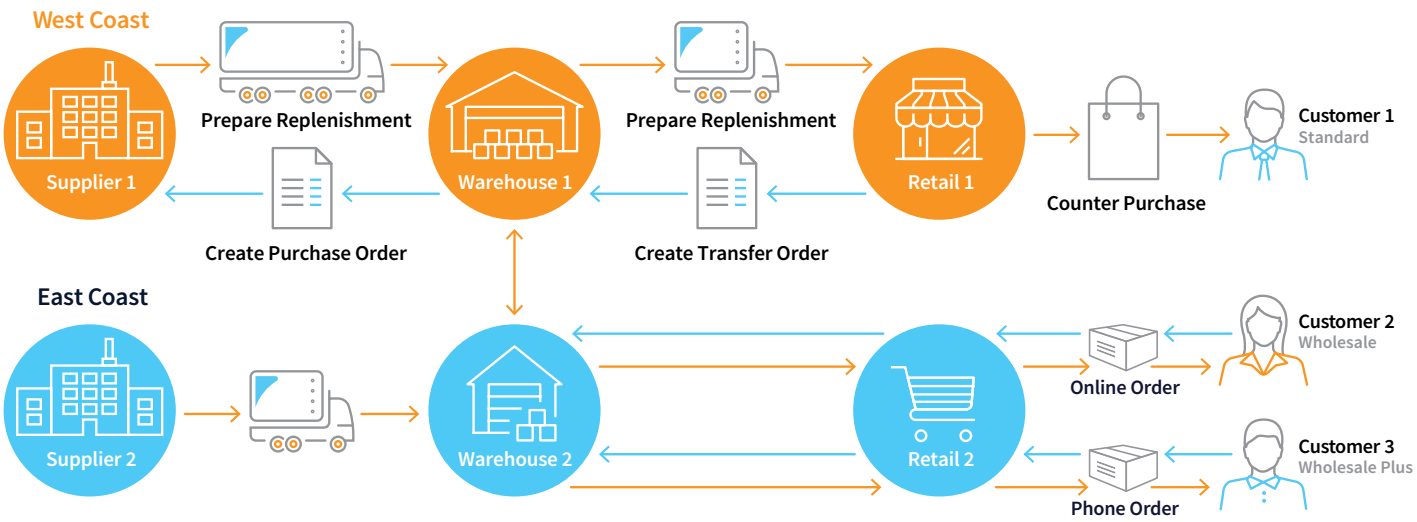
Never wonder what is happening with mobile access to everything from your mobile device. Native apps for iOS and Android devices keep busy executives connected, even when they are not in the office. Approve timecards, expense receipts, and purchase order requests from your smartphone.

"Acumatica allows my focus to be more on the business rather than wondering where I go to find the information I need. Knowledge is power and the quicker you can get to the knowledge, the better off you are."

– SCOTT MCCALLA, CHIEF STRATEGY OFFICER
INTERNATIONAL PIPE & SUPPLY LLC

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DISTRIBUTION FLOW



Create custom workflows for every distribution scenario, including online, in-house, and retail sales, warehouse transfers, returns and exchanges, order picking and packing, shipping, and field service operations.



WAREHOUSE AND DC MANAGEMENT

Warehouse and distribution center managers, warehouse workers, shipping and receiving employees, and transportation and logistics managers never have to leave Acumatica to manage their daily activities with native and connected applications. Access real-time order information from connected commerce and in-house sales orders. View live inventory across warehouse locations. Acumatica includes a native warehouse management system (WMS) with connectivity to mobile applications to streamline order fulfillment.

ROLES AND RESPONSIBILITIES

- Work across warehouse, supply chain, and sales teams to streamline order fulfillment
- Manage inventory, resolve issues, and ensure staffing for warehouse operations
- Monitor picking, packing, shipping, and procurement to ensure maximum profitability
- Approve employee time and expense entries and requisition requests
- Prepare warehouse reports and analysis for executive management teams
- Implement continuous improvement projects
- Work with HR on training and recruitment

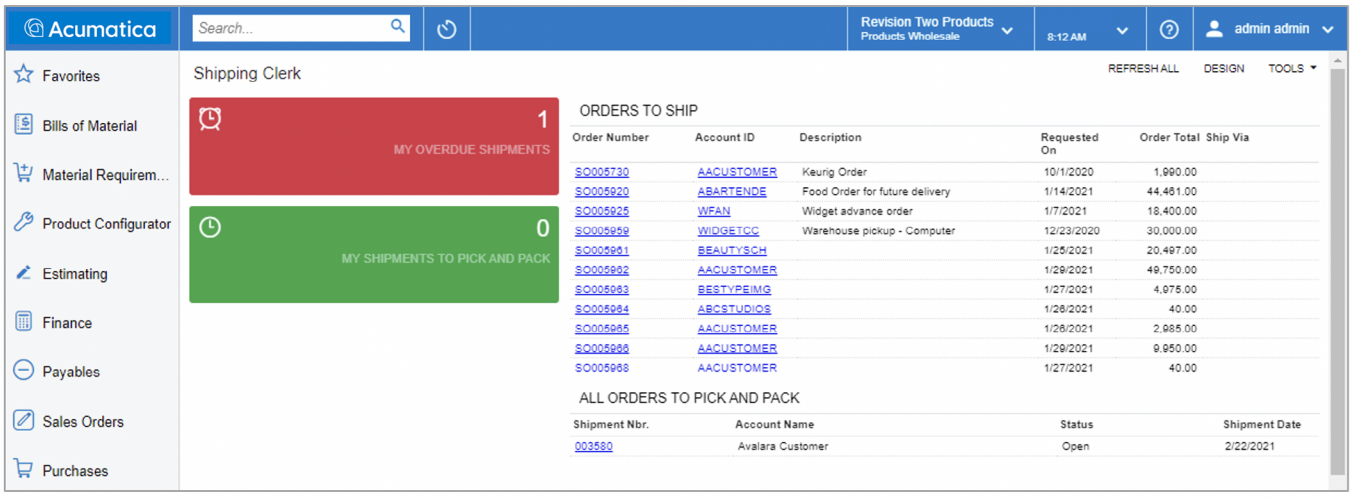
ACUMATICA FOR WAREHOUSE MANAGEMENT

Every order flows into Acumatica for fulfillment. Advanced replenishment helps managers balance supply and demand with min/max stocking levels and safety stock. Other features include physical inventory and warehouse transfers. Create pick lists for warehouse employees, process packaging with integration to scales. Automatically print documents such as labels and shipment confirmation. Connect to small parcel, less-than-truckload (LTL), or truckload (TL) shipments through marketplace applications. In addition, Acumatica supports omnichannel sales, returns, and exchange processing for wholesale distribution and retail businesses.

"Users can get real-time information according to their specific profiles and make decisions for their daily activities with more autonomy and accurate information. Acumatica is changing the way we work."

– SOFIA ESTUDILLO, PROJECT MANAGER, EOS GROUP

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Build dashboards for warehouse managers, shipping and receiving personnel, and warehouse workers to stay on top of daily activities with drill-downs to source transactions and email or SMS text notifications.

ORDER MANAGEMENT

Centralize orders from in-house sales and commerce or point of sale transactions for a 360-degree view of customer orders in a centralized database.

ADVANCED PICKING

Pick by order or use advanced wave and batch picking with barcode scanners and carts. Set up ABC codes to identify high-volume items for warehouse configuration.

RECEIPT AND PUT-AWAY

Process receipt of goods with defined stocking locations by bin and by warehouse location. Use mobile technologies for receipt and movement transactions.

PACKING

Maintain package weight in Acumatica and print packing lists for shipments. Barcoding validates data capture by identifying each item packed for the shipment. In addition, Acumatica supports user-defined packaging and custom unit of measure conversions.

SHIPMENT PROCESSING

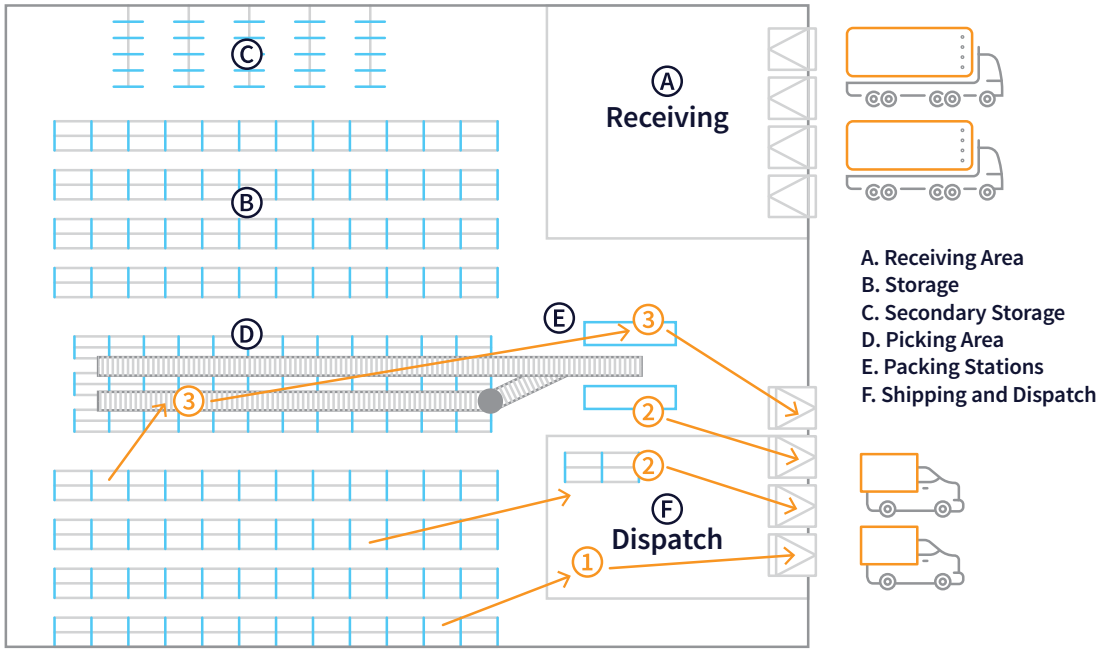
Create shipments from inside Acumatica with marketplace connections to external shipping applications for small parcel, less-than-truckload (LTL), or truckload (TL) shipments. Configure Acumatica to store shipment tracking numbers.

INVENTORY MANAGEMENT

Acumatica Inventory Management provides everything warehouse managers and employees need to manage daily activities. Use matrix items to create product families and streamline sales and purchasing. Create and disassemble kits and track inventory by warehouse, bin, and lot/serial number. Use forecast algorithms and replenishment to manage procurement. Acumatica makes it easy to conduct physical inventory counts with barcoding and count worksheets. Manage perishable inventory with expiration dates and set up cross-references for internal, customer, and vendor items.

Shipping Flows

1. **Single order picked, packed, shipped. Option to specify box contents and select carrier.**
2. **Use cart to pick multiple orders and bring them to a packing area for boxing, labeling, and shipping.**
3. **Supply picking stations via bulk transfers with breakdown. Pick, pack, label, and ship with options described in #1.**



Configure native WMS with advanced wave and batch picking and setup areas for packaging, shipping, and receiving.

Discover Why Distribution Leaders Rely on Acumatica for Their Success

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SALES, COMMERCE SALES, AND RETAIL SALES

Manage showroom and retail sales with Acumatica Point of Sale powered by IIG. Most ERP applications connect to CRM for sales automation and commerce storefronts for online orders. Still, few provide a 360-degree view of the business and access to inventory and sales order information from the ERP application. Acumatica CRM connects sales with the information they need to manage opportunities effectively with increased win rates. Native commerce connectors for BigCommerce, Shopify, and Shopify POS streamline data transfer between Acumatica and commerce applications.

ROLES AND RESPONSIBILITIES

- Manage sales opportunities and quotes
- Communicate with prospects and customers
- Negotiate pricing and discounts
- Manage commerce storefront sales
- Work effectively in the office or on-the-road
- Oversee retail sales for showrooms and brick-and-mortar retail operations
- Assist finance with credit terms and collections
- Work with marketing to develop collateral and messaging to increase leads

ACUMATICA FOR SALES AND RETAIL SALES

Chief revenue officers, category managers, commerce directors, sales representatives, store managers, and other sales and marketing employees access a 360-degree view of account interactions with embedded CRM and connected commerce storefront applications. Leverage native email to send quotes to customers with DocuSign integration for electronic signatures and automated quote approval workflows. Access online sales information with connected commerce storefronts to analyze online orders. Reserve inventory stock for customer orders, see what inventory is available for sale, how much is on order, and view stocking levels across locations for warehouse transfers.

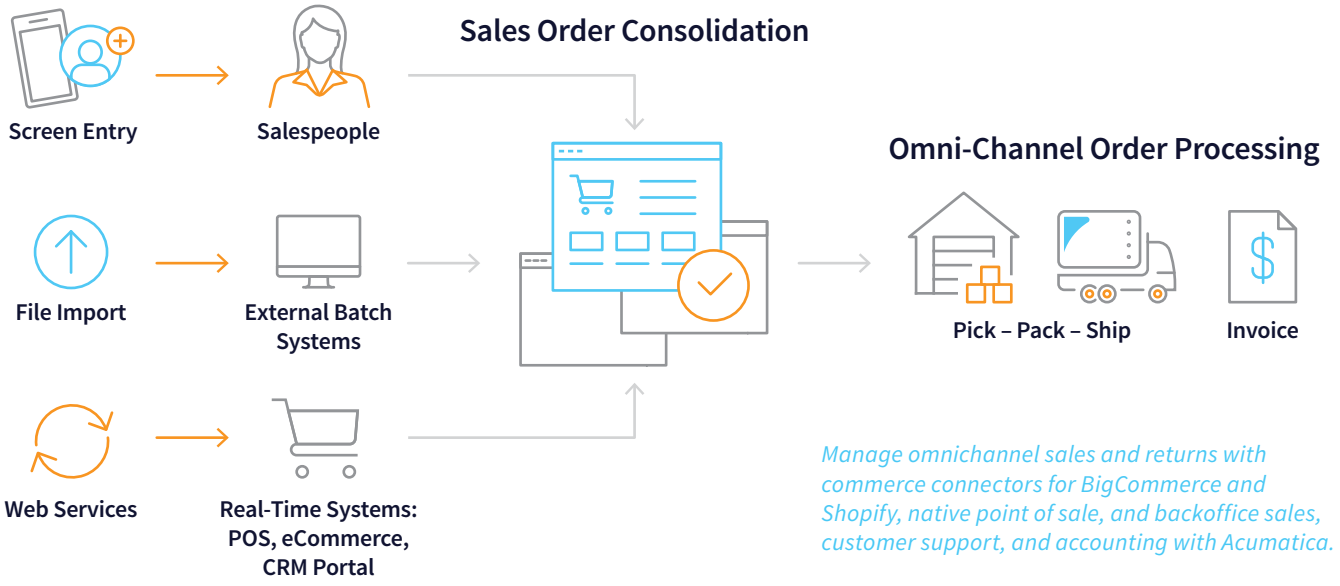
"The sales reps were never allowed into our ERP system, but now they can connect at any time . . . They can see which customers ordered in the past and get reports. With access to CRM, they can see notes and activities entered by the customer service team. There is improved communication between our reps and the inside team, which we didn't have before."

– JODI ANSTANDIG, FINANCE DIRECTOR, BIOPELLE

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Configure sales workflows with embedded CRM for lead alignment, sales cycles, and cross-departmental communication.



Manage omnichannel sales and returns with commerce connectors for BigCommerce and Shopify, native point of sale, and backoffice sales, customer support, and accounting with Acumatica.

GAIN INSIGHTS

Access personalized dashboards and powerful business analytics with access to source transactions. Build key performance indicators to monitor sales results.

COMMUNICATE EFFECTIVELY

Log phone conversations in CRM and send emails directly from Acumatica. Email employees with links to files and records to streamline communication for accounting, procurement, returns and exchanges, and order management. Empower customers with self-service portals and native connectors to commerce storefronts.

MANAGE YOUR PIPELINE

Automated lead assignment makes it easy to know which opportunities are in your sales queue. Then, configure stages to move prospects through the buying process.

BUILD RELATIONSHIPS

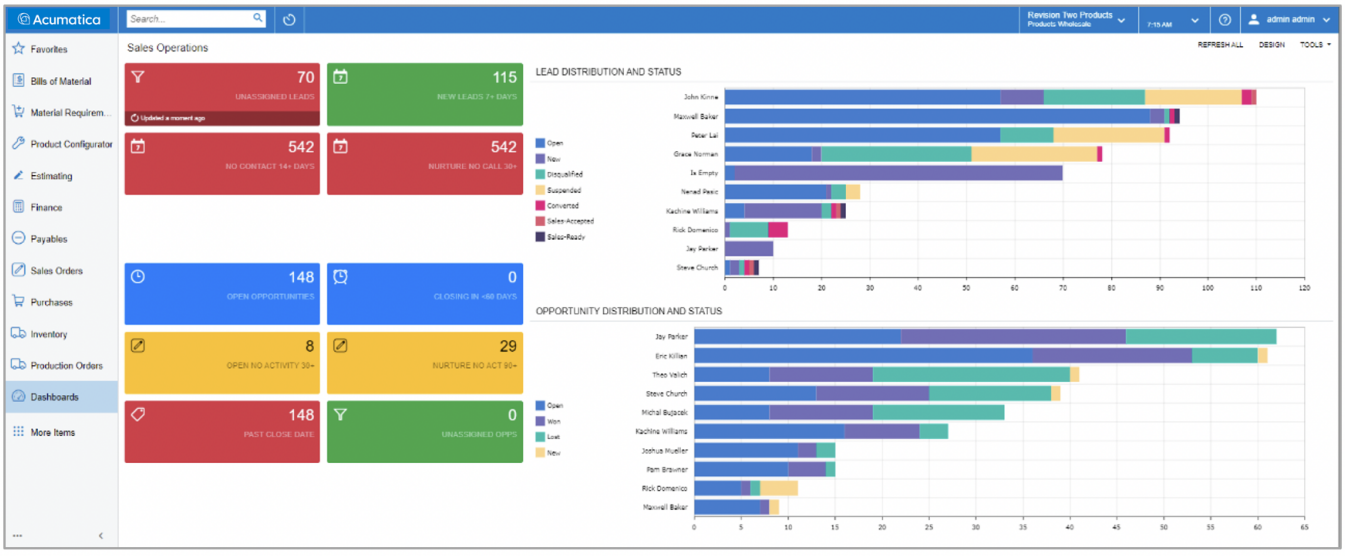
Learn more about customers and prospects with detailed account and contact profiles. Schedule follow-up activities to nurture relationships. Manage customer issues effectively with embedded support cases.

IMPROVE SALES

Integrated marketing ensures a steady flow of qualified buyers to your commerce storefront or brick-and-mortar store with email campaigns and promotions. Configure cross-sell and up-sell inside sales applications.

STAY CONNECTED ANYWHERE

Use Android and iPhone mobile apps to access CRM and other Acumatica tasks and activities on the road. For example, create timecards and submit expense receipts electronically anytime, anywhere, on any device.



Build custom dashboards for sales operations, commerce managers, and sales reps to measure and monitor marketing and sales activities in real-time with embedded CRM and connected commerce storefront applications.



PURCHASING

Buyers and purchasing managers play a crucial role in every distribution and commerce business. Plan purchases based on replenishment settings such as safety stock, reorder points, min and max purchase quantities, and manage supplier relationships with insights into volume discounts for improved profits. Create and approve purchase order requisition requests with flexible approvals workflows, mobility, and vendor bidding.

ROLES AND RESPONSIBILITIES

- Develop and manage purchasing strategies
- Manage relationships and negotiate contracts
- Create and manage purchase orders to ensure sufficient stock to optimize inventory levels
- Coordinate transportation and logistics
- Review and approve requisition requests
- Solicit suppliers for product bids
- Evaluate forecasts for purchase planning

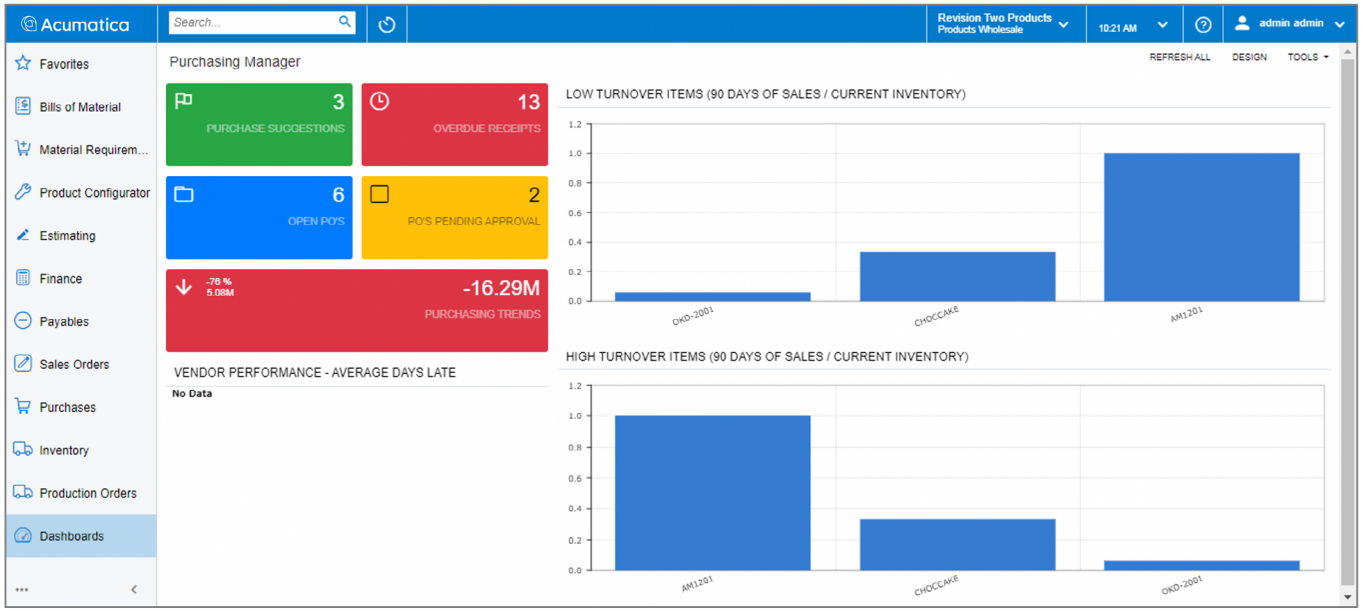
ACUMATICA FOR PURCHASING

Modern cloud ERP applications like Acumatica make it easy for purchasing executives to automate and streamline procurement with flexible purchase orders, native requisition management, blanket purchase orders, and advanced inventory replenishment options. Use your mobile device to approve requisition requests, manage vendor relationships with embedded CRM, and automate procurement with flexible workflows and connected applications for EDI transactions. Acumatica Business Events alert you to late orders, damaged product receipts, or low stock by warehouse location.

"Acumatica's inventory application is a game changer. We've lowered inventory costs, and we couldn't have done that without Acumatica. Now Best Vinyl knows what and when to order stock, which has saved millions."

– AARON GABRIELSON, CTO, REDMOND

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Monitor stock across warehouse locations with actionable dashboards, key performance indicators, and real-time alerts.

MANAGE VENDOR RELATIONSHIPS

Setup vendors and contacts in the native CRM application for supplier relationship management. Log communications, store contract documents, and set up notifications for contract renewals.

AUTOMATE PROCUREMENT PROCESSES

Convert purchase orders from requisitions and streamline vendor billing with accounts payable invoice automation powered by artificial intelligence with machine learning. Purchasing professionals tailor purchasing approvals and other workflow processes. Simplify receiving and put-away with barcodes and mobile applications.

FORECAST DEMAND

Define min and max order quantities, reorder points, seasonality, lead times, safety stock, and forecast models to calculate replenishment. Harness connected marketplace applications for improved forecasting.

CONTROL COSTS

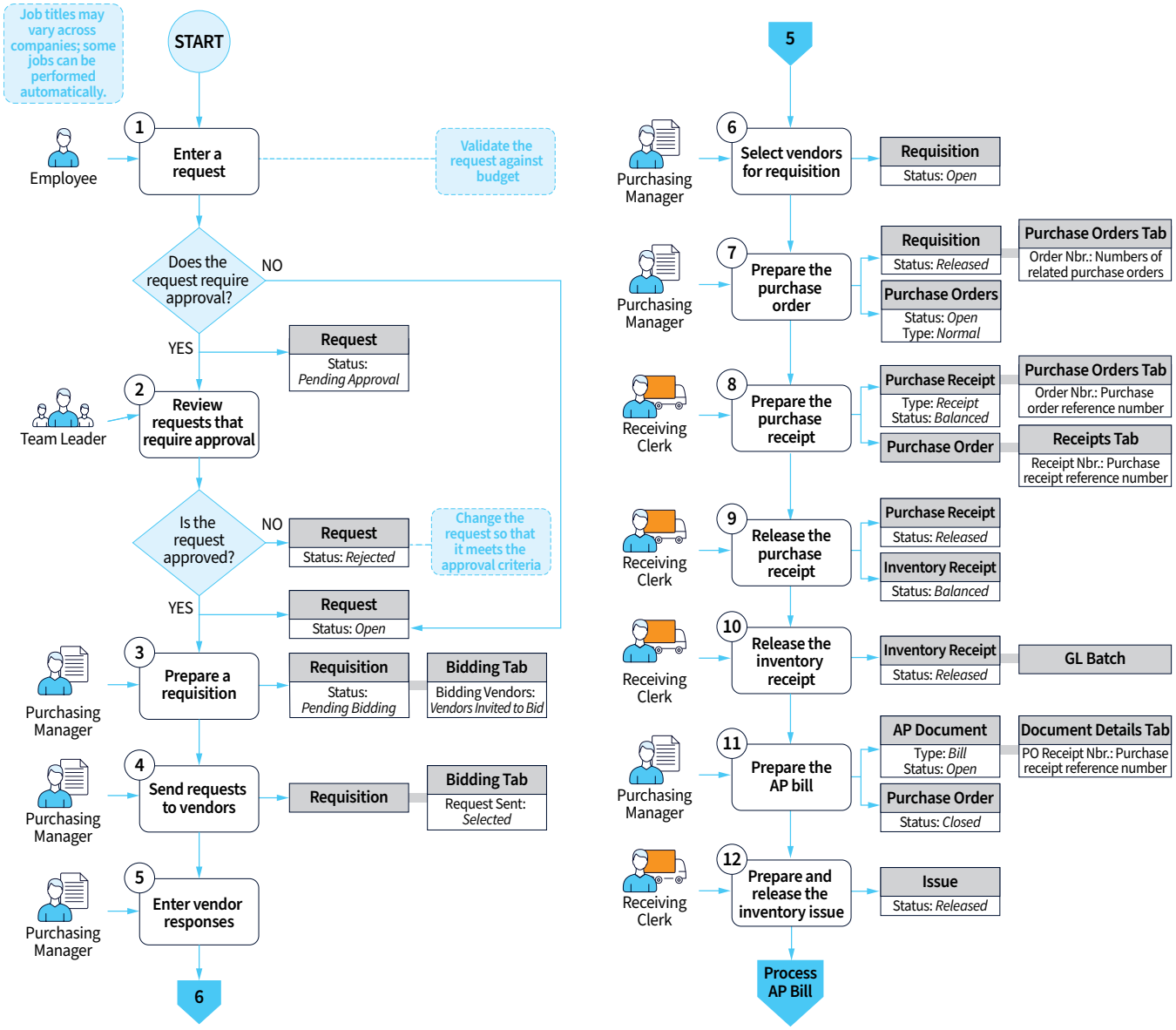
Set up alerts and business events to take advantage of early payment discounts and identify volume price breaks. Minimize carrying costs and increase inventory turns with tight integration with inventory to optimize stocking levels. Include shipping, receiving, insurance, and duties in the total cost of your purchase items.

IMPROVE FULFILLMENT

Reduce stock-out situations and rush orders with better purchasing and inventory planning tools to exceed customer expectations.

COLLABORATE WITH VENDORS

Acumatica's unlimited user licensing enables purchasing executives to provide secure access to strategic vendors for vendor-managed inventory and collaborative supply planning. Automate vendor communication with workflows, business events, and automated vendor report delivery.



Tailor purchase order and requisition processes with built-in approval workflows and powerful automation.



CUSTOMER SUPPORT

Customer support representatives and other support staff must have accurate and timely customer information to manage issues efficiently. Order history, shipment tracking, accounting, and other details are essential to identify and resolve customer issues for returns, exchanges, installation and service questions, and additional information for customer support requests.

ROLES AND RESPONSIBILITIES

- Assist customers with product support cases, order status, and account information
- Process returns and exchanges
- Collaborate with employees in other departments to resolve customer issues
- Communicate with customers via phone or email
- Assist customers with online orders or self-service
- Track support cases and support activities in CRM
- Track billable and non-billable support against projects or customer contracts

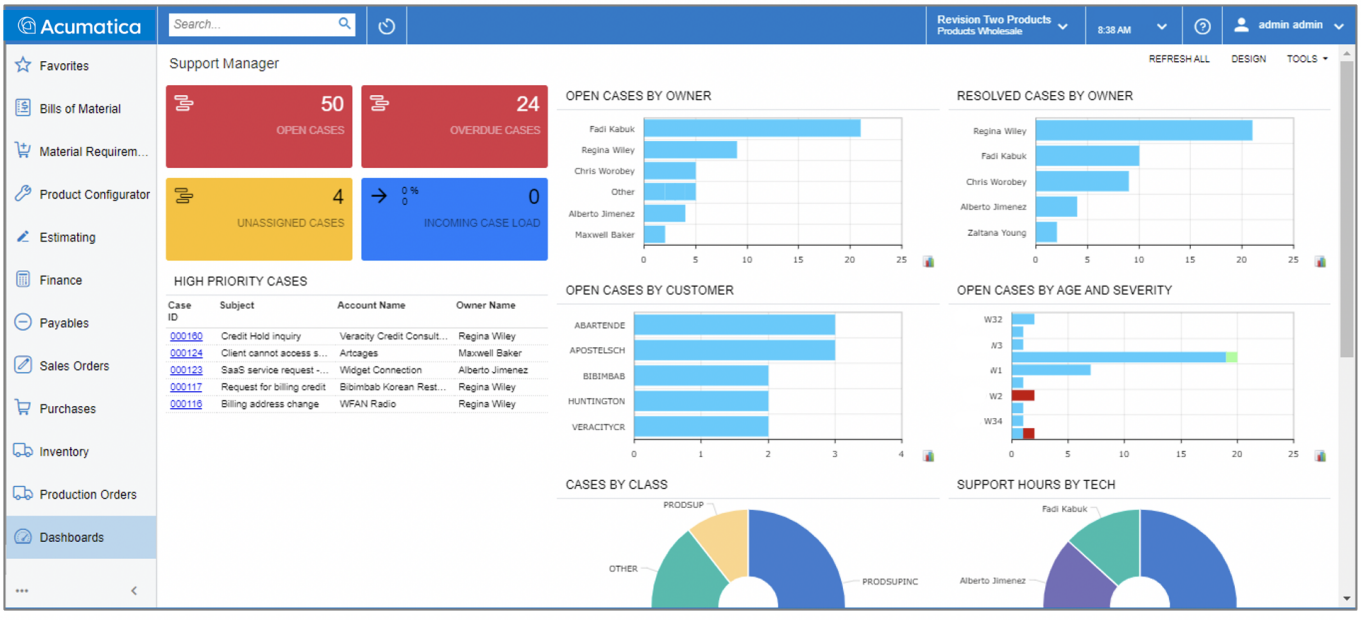
ACUMATICA FOR CUSTOMER SUPPORT

Acumatica empowers customer support representatives with a complete view of customer accounts. View invoices, statements, support contracts, order history, notes, and prior communication activities. Access product information, schedule field service, or process returns and exchanges. Create and assign tasks with built-in notifications and configurable approvals workflow. With Acumatica, customer support agents deliver unparalleled customer support and services to retain and grow customer relationships.

"With Acumatica, we've gained more visibility into our business . . . Having everything in one place—our CRM contacts alongside the orders that are flowing through—and being able to report on it."

– DESY WILSON, PRESIDENT DIRECTOR, PT MULTI NATIONAL EQUIPMENT (MNE)

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Create and manage customer support cases with powerful analytics and instant access to information to expedite resolutions for customer support requests.

OTHER DISTRIBUTION AND COMMERCE ROLES

Tailor Acumatica for other distribution and commerce roles, including field service, project management, quality control, and more. Create custom workspaces by role and control access to applications, reports, and data with multiple levels of security. Acumatica empowers every distribution and commerce employee with cross-departmental workflows and connected, real-time data from all parts of the business.

"If the warehouse has low inventory for an item, it is immediately exposed to purchasing to place the order for more. We now have real-time visibility to pertinent data."

– BEN ROTHE, GENERAL MANAGER AND CEO, PREMIER 1 SUPPLIES

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FIELD SERVICE AND PROJECT MANAGEMENT



Acumatica's service management, equipment management, and project accounting applications extend the application for distributors and retail businesses who install, maintain, and service equipment or offer project management and billable consulting services. Manage customer or company-owned equipment, track equipment warranties and service history, and dispatch field service technicians based on skill or certification. Create multi-task projects with flexible billing and project reporting.

QUALITY MANAGEMENT



Acumatica provides reports and inquiries to manage vendor performance with lot and serial tracking for quality control. In addition, connected marketplace applications provide advanced quality management for non-conformance, corrective actions, inventory quarantine, and more.

SHIPPING AND RECEIVING



Acumatica connects to your favorite shipping applications, scales, barcode label printers, and other systems providing a cohesive system for preparing customer shipments. Embedded warehouse management (WMS) streamlines the receipt and put-away process with mobile apps for ruggedized scanners or smartphones. Create dashboards to monitor shipments and receipts and access real-time reports with notifications to improve business processes.

OTHER DISTRIBUTION AND COMMERCE ROLES

Acumatica's flexible dashboards, workflows, and security support various distribution and commerce roles, including promotion and merchandising staff, delivery personnel, brand managers, advertising executives, cashiers, digital marketing, and others in the organization.

Discover How Retail Executives Connect Online and In-Store



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Empower Retail and Distribution Staff with a Future-Proof, Role-Based ERP Application

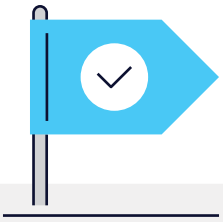
Wholesale distributors and retail businesses using legacy ERP systems struggle with disconnected systems and manual processes. Data silos and disjointed workflows create barriers to growth, limiting executives from effectively managing their supply chains and daily business activities.

Acumatica provides distribution and retail executives with real-time information anytime, anywhere, on any device to stay on top of issues, take strategic actions, manage operations, improve product quality, and contain costs. Take action on late inventory receipts, identify vendor quality issues, and spot commerce storefront trends with powerful business analytics.

Acumatica provides a complete suite of distribution and commerce applications to boost sales, automate warehouse operations, optimize inventory, and streamline purchasing. Connect your commerce storefront with back office order fulfillment and accounting operations.

Last-mile features such as matrix items, kitting and disassembly, stock reservations, warehouse management, advanced wave and batch picking, and requisitions simplify item and inventory management.

Acumatica Cloud ERP provides the best industry and omnichannel business management solution for transforming your distribution and retail company to thrive in the new digital economy. Built on a future-proof platform with an open architecture for modern technologies, rapid integrations, scalability, and ease of use, Acumatica delivers unparalleled value to small and midmarket businesses.



"Our technology costs are now 33 percent cheaper and we have 10 times the functionality. Our organic traffic is up 45 percent and we are selling more because we are off NetSuite and on Acumatica."

DAVE MUNSON
FOUNDER AND CEO
SADDLEBACK LEATHER

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.