Acumatica
The Cloud ERP

Acumatica Role-Based ERP Software for Distribution and Retail

A Solution Brief for Growing Distributors

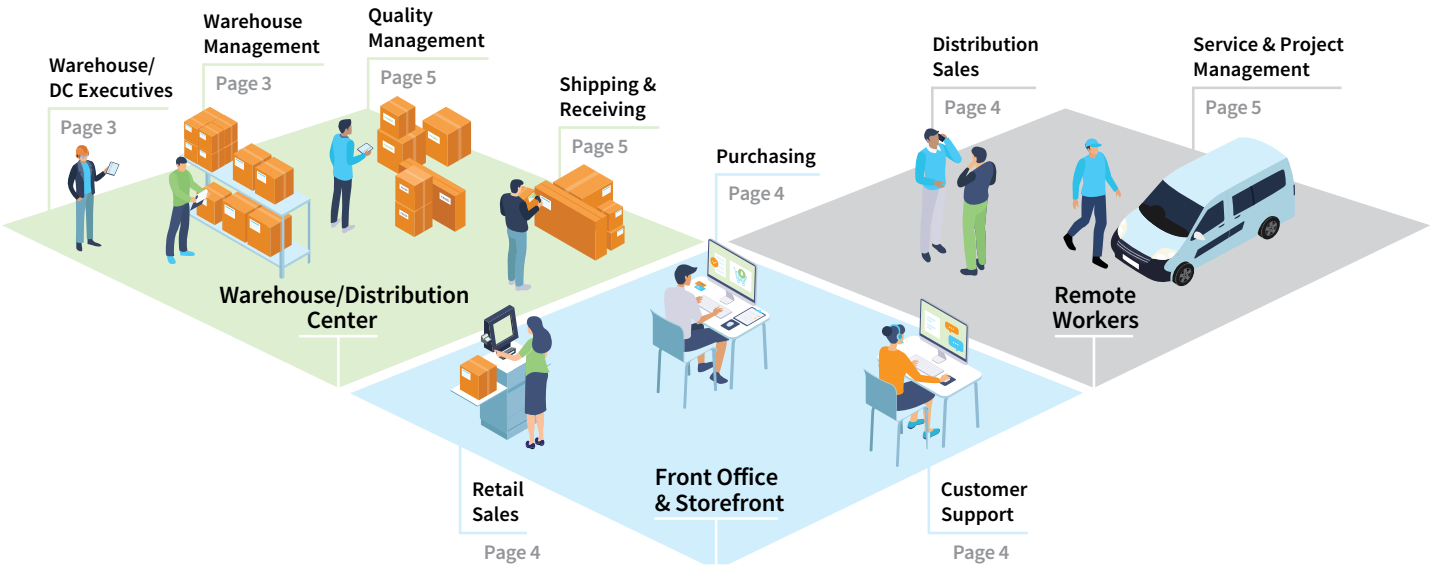
Boost Sales and Improve Customer Lifetime Value with Role-Based Dashboards, Real-Time Data, and Configurable Workflows

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 Distribution and commerce leaders are forced to access multiple systems with outdated reports to gather information to manage daily activities and long-term strategic objectives.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 solution brief explores the world of modern-day ERP applications like Acumatica. It shows how wholesale distributors and retail organizations align information and workflows to capture, retain, and grow sales with connected applications to provide a world-class customer experience.



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.



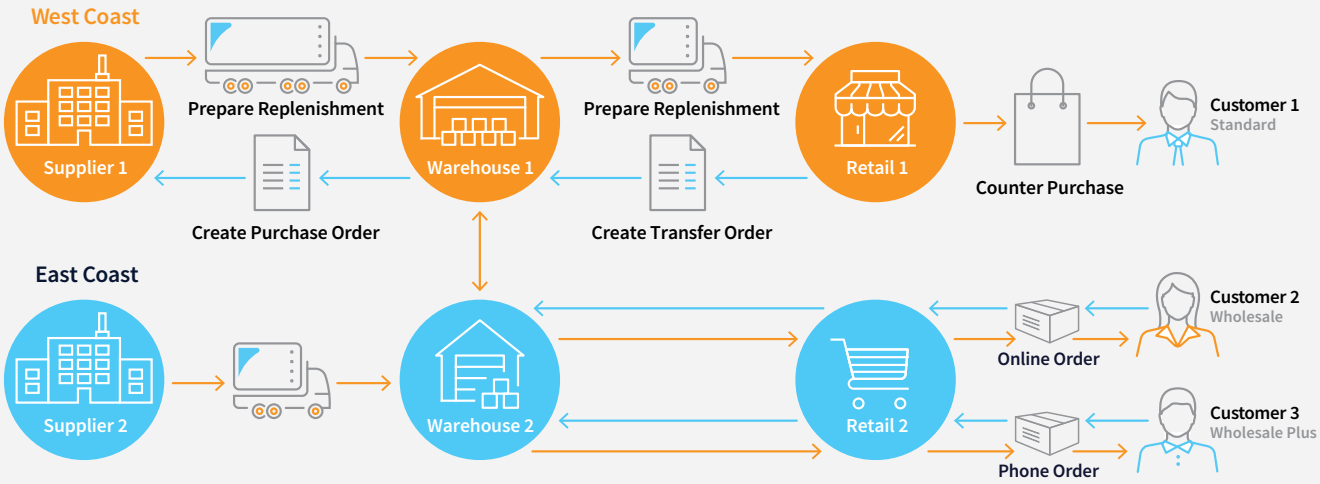
DISTRIBUTION AND RETAIL LEADERS

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

Executive leaders rely on real-time information to streamline operations and balance supply and demand. Know what is happening with real-time data and automated notifications when situations impact sales, order fulfillment, transportation, and warehouse operations. Stay connected with mobile apps to approve timecards, expenses, and requisitions. Manage budgets with detailed views into operational costs. For example, Acumatica can automate picking, packaging, receiving and put-away, and inventory transfers using handheld scanners. Further, optimize picking using wave and batch strategies.

- Measure Results with Role-Based Dashboards
- Gain Insights with Real-Time Reports and Inquiries
- Track Budgets and Expenses in a Single System
- Manage Relationships with Embedded CRM
- Manage Projects with Native Project Management
- Stay Connected with Mobile Application

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 daily activities with native and connected applications. Access live 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.

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. In addition, Acumatica supports omnichannel sales, returns, and exchange processing for wholesale distribution and retail businesses.

- Omni-Channel Order Management
- Advanced Picking with Barcodes
- Receipt and Put-Away with Bins
- Packing with Custom Units of Measure
- Shipment Processing with Shipper Connections
- Inventory Management



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 the ERP application's inventory and sales order information. Acumatica CRM connects sales with the information they need to manage opportunities effectively with increased win rates. In addition, native commerce connectors for BigCommerce, Shopify, and Shopify POS streamline data transfer between Acumatica and commerce applications.

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.

- Gain Insights with Dashboards and Analytics
- Communicate Effectively with CRM and Native Email
- Manage Your Pipeline with Lead Assignments
- Build Relationships with Embedded Support
- Boost Sales with Integrated Marketing
- Stay Connected Anytime, Anywhere, on Any Device



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 requisition requests with approvals workflows, mobility, and vendor bidding.

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.

- Manage Vendor Relationships with CRM
- Automate Procurement with Replenishment
- Forecast Demand with Flexible Options
- Control Costs with Requisition Management
- Improve Fulfillment with Barcode Scanning
- Automate Vendor Collaboration and Communication



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.

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.

- Gain a 360-Degree View of Customer Transactions
- Automate Case Assignment and Escalation
- Create Support Notes and Tasks
- Empower Customers with Self-Service Portals
- Improve Customer Communication
- Configure Flexible Rules for Customer Billing

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.

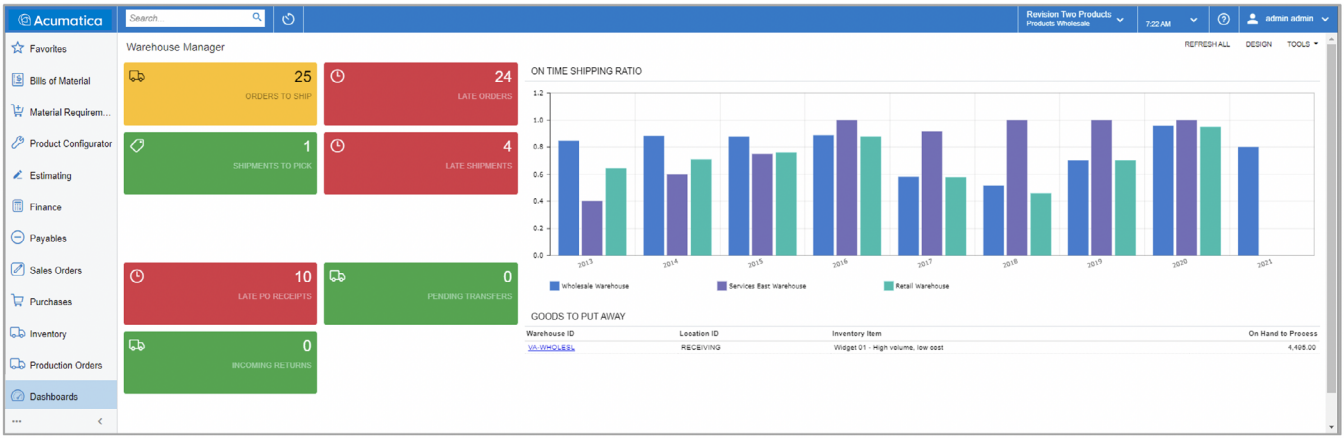
SHIPPING AND RECEIVING



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.



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.

Boost Sales and Exceed Customer Expectations with a Future-Proof, Role-Based ERP Application

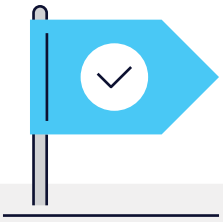
Wholesale distributors and retail businesses using legacy ERP systems struggle with disconnected systems and manual processes. Data silos and disjointed workflows create barriers to growth, limiting executives from effectively managing their supply chains and daily business activities.

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 for a world-class customer experience resulting in higher customer lifetime value and reduced customer retention costs with less effort. 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.