Acumatica
The Cloud ERP

Ignite Success with Real-Time Reporting and Intelligence

A Solution Brief for Growth-Minded Organizations

GET SMART: EMPOWER EMPLOYEES TO WORK SMARTER WITH ROLE-BASED BUSINESS INTELLIGENCE AND REAL-TIME REPORTING

Knowledge is power. Giving employees real-time knowledge to make informed decisions, complete projects, and resolve problems fuels profitability.

However, most companies struggle to harness real-time knowledge. Therefore, they purchase analytical tools to exploit big data but fail to gather strategic insights that optimize the operations. Meanwhile, reporting systems are only as effective as the underlying data.

Acumatica combines the power of its award-winning ERP platform and customizable reporting engine with leading business intelligence to streamline operations and ignite innovation throughout the organization. The cloud-based solution delivers standard and custom reporting with drill-down capability, dynamic dashboards, and integrated business analytics from Microsoft BI and Tableau.

Acumatica takes raw data collected throughout the enterprise and converts it into mission-critical information. Role-based dashboards present users with the real-time insights they need to thrive. The award-winning solution presents updated company health analysis and personalized key performance indicators (KPIs) on each user's homepage.

This Acumatica solution brief demonstrates how customizing real-time reports for each user and infusing them with business intelligence fosters a productive and profitable culture.

DRIVE RESULTS WITH DATA-DRIVEN INSIGHTS



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REAL-TIME REPORTING

Data-Driven Insights for Each Role

Unless organizations can gather and analyze real-time insights from each system in their operation, they will miss vital opportunities to address problems and advance goals. Companies must continually convert updated financial, product data, and customer data into meaningful insights to effectively track sales, expenses, production, and distribution.

Acumatica empowers organizations with data-driven insights delivered to each user's desktop. Hundreds of standard reports provide instant access to core financial and operational information aggregated throughout the enterprise. In addition, customized dashboards present key performance indicators to each user's homepage every day. Users can also schedule recurring reports to keep them abreast of changes.

CENTRALIZED DATABASE AND REAL-TIME REPORTS PROMOTE FINANCIAL TRANSPARENCY



Acumatica connects all application data in a single database, providing a complete 360-degree view of every business area and ensuring all users access one version of organizational truth. Dashboards present robust financial and operational data for the entire enterprise, such as revenue, accounting, sales contracts, customer activity, and inventory.

BUSINESS INTELLIGENCE INFUSES REPORTS WITH MISSION-CRITICAL INFORMATION

Acumatica puts the power of real-time data at employees' fingertips with powerful insights personalized for their roles and priorities. Best-in-class business intelligence tools, like Microsoft Power BI and Tableau, work behind the scenes to aggregate data from multiple external sources and extract actionable information.

Acumatica transforms business intelligence into real-time reports and role-based dashboards that optimize financial reporting, boost profitability, and demonstrate compliance. For example, the system filters intelligence data to produce reports that rank products by profitability.

DASHBOARDS DELIVER AN END-TO-END VIEW OF OPERATIONS AND CUSTOMER ACTIVITY



Acumatica sifts through data that originated in multiple al sources to populate custom reports, such as KPIs, sales figures, inventory, and customer support. Leaders can evaluate company health at any time by accessing real-time reports and personalized dashboards on any browser-based device, including their smartphone.

For example, they can quickly ascertain up-to-date sales figures by region, representative, and product line. In addition, they can project inventory shortages and identify weak links in the supply chain. They can use pivot tables to analyze criteria from multiple perspectives, drill down to research underlying sources, and initiate follow-up tasks from their Acumatica homepage.

"With Acumatica, we have a lot more actionable business intelligence. I have the ability to pull reports and see data, which was really eye-opening. I saw our core business was profitable, of course, but I also saw some projects that had not been renegotiated or gone through a rate renewal in years. Those projects were not as profitable as we believed they were."

– CHRIS WILLIAMS, DIRECTOR OF BUSINESS OPERATIONS
INTERACTION ASSOCIATES

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INTUITIVE CUSTOMIZATION

Robust Tools Amplify Reporting Flexibility Without Programming

If users cannot easily produce reports that advance their business objectives, they will abandon the system and pursue error-prone, manual workarounds.

Acumatica's robust reporting tools simplify report creation and equip employees with what they need to respond to evolving demands. Reports provide historical and real-time data so users can access critical information at a glance. Drill-down capabilities enable them to research sources and follow up on one screen. Since all reporting capabilities are embedded in the ERP platform, they honor Acumatica's security rules and customization options. The following tools streamline report creation.

REPORT DESIGNER



Report Designer enables users to create reports and forms quickly, including invoices and pick lists. They can preview reports and switch between design and preview modes.

NO-CODE/LOW-CODE DEVELOPMENT

Acumatica lets users select report criteria and customize reports and dashboards by pointing and clicking.

CUSTOMIZABLE WIKIS

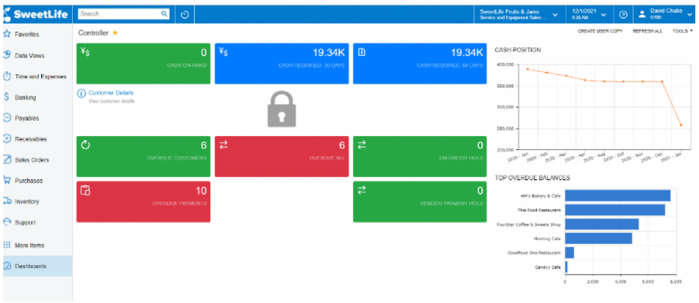
Customizable Wikis document business processes and teach employees about applications and features.

MULTI-DIMENSIONAL REPORTING

Multi-Dimensional Reporting breaks down data by dimensions, such as product and store, to help users evaluate information from different perspectives and spot patterns and exceptions.

GENERIC INQUIRY

Employees use Generic Inquiry to gather data across modules and receive smart suggestions. For example, they can create widgets to track criteria, such as available inventory, upsells, and sales numbers per person, region, and product.





SECURITY

Acumatica keeps confidential data secure. Role-based security ensures users can access only the information they need for their work.

"The implementation of our dashboards has been a huge help to us and time—saving. All the information you need is on one page. I built one for me that has every financial KPI that I'd want to track."

– SEAN BARNETT, CHIEF FINANCIAL OFFICER
SPOHN ASSOCIATES

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COMPLIANCE

Demonstrate Compliance on Demand

Compliance efforts drain budgets as organizations scramble to support evolving federal and state regulations. Organizations must be ready to demonstrate compliance at all times or risk hefty fines and reputational damage.

Acumatica equips organizations with robust, real-time reporting that can prove compliance at all times. In addition, users can tailor compliance reports for specific regulations with little or no programming.

SUPPORT POPULAR REGULATIONS

The Acumatica ERP platform connects with external data to build reports, dashboards, and business processes that enable organizations to demonstrate compliance to industry standards, such as GDPR, SOC 1/SSAE 16/ISAE 3402, SOC 2, and other regulations.





PROTECT CONFIDENTIAL DATA

Data privacy embodies an essential compliance requirement. Acumatica tailors the information in each report to each user's needs. Embedded role-based reporting restricts unauthorized access to customer and organizational data.

SCHEDULE COMPLIANCE REPORTING

Stay on top of compliance with scheduled reports that provide details on each compliance criteria and share them with colleagues.





PROVIDE AD HOC, ON-DEMAND REPORTING

With Acumatica, users can request proof of compliance at any time. For example, they can generate a compliance report that provides historical and current compliance information and customize Acumatica to include compliance data on their personalized reports. When auditors visit, they can immediately obtain reports that demonstrate compliance and drill down for a complete history.

DELIVER ANYTIME, ANYWHERE ACCESS TO COMPLIANCE REPORTS

Acumatica's mobile framework allows users to pull compliance reports on their mobile device at any time and enjoy the same intuitive experience.



"I'm looking forward to the audit this year because it's so much easier with Acumatica and its paperless nature."

– ANDY GALE, CHIEF FINANCIAL OFFICER & CHIEF OPERATING OFFICER
LIVEVIEW TECHNOLOGIES

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CONCLUSION

Intelligent, Real-Time Reporting Drives Success

Organizations must make complex data digestible at first glance. If not, they cannot seize growth opportunities or proactively resolve hidden problems.



Acumatica delivers the information companies need to grow revenue, control expenses, and make innovative decisions every day. Personalized business views present data-driven insights and accelerate decision-making.

Acumatica converts vast amounts of raw data into mission-critical insights by integrating its best-in-class ERP platform and customizable reporting capabilities with a leading business intelligence tool.

Acumatica keeps top priorities in front of each user. Real-time reporting and personalized dashboards put critical information at employees' fingertips. Meanwhile, automated alerts keep important tasks moving. Mobile capabilities ensure users can access the information they need anywhere at any time.

Acumatica's centralized database powers the reports and ensures every team member works with one version of organizational truth. Role-based security protects confidential data by allowing users to access only the data they need for their work.

With Acumatica, growing organizations take reporting and analysis to the next level, moving beyond balance sheets and cash flow statements to outcome-driven insights that empower users and ignite profitability.

"Personally, I couldn't do my job if I didn't have the Acumatica platform. With Acumatica, I have visibility into the data and insights into operations through dashboards and trigger notifications that allow me to respond and support teams across our various branches."

– BRYAN MULLEN, SVP SHARED SERVICES
LIFEWAY MOBILITY

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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.