Acumatica
The Cloud ERP

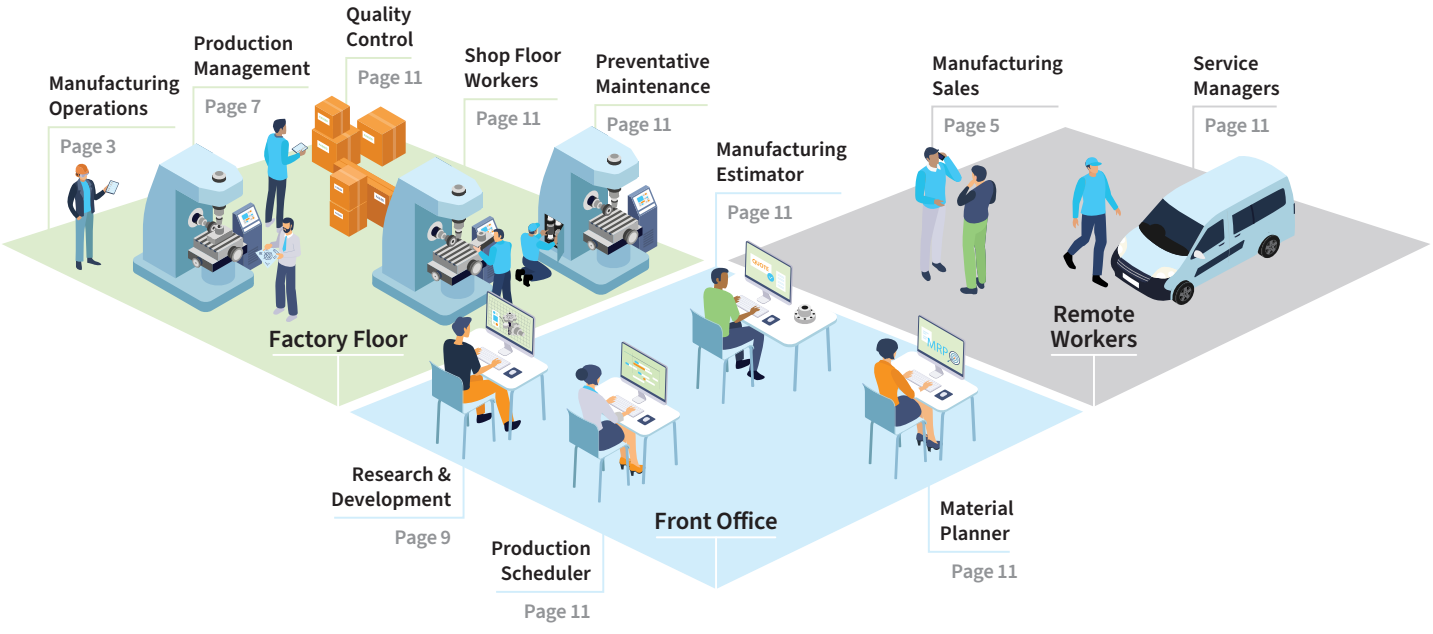
Acumatica Role-Based ERP Software for Manufacturers

Empower Manufacturing Leaders with Role-Based Dashboards and Configurable Workflows to Drive Growth

Legacy Enterprise Resource Planning systems for manufacturers are notoriously complicated. Manufacturing employees struggle to get the information they need to make decisions, spot trends, or react to issues as they arise. Complicated screens and disconnected applications create barriers to growth, forcing employees to enter data into multiple systems with offline analysis in spreadsheets. Simple manufacturing management tasks require too many steps to complete data entry through numerous screens in the application.

There is a better way. Modern manufacturing ERP applications like Acumatica were designed from the ground up to be different. Empower employees with role-based dashboards to strategically monitor the manufacturing and business information they need to manage their area of responsibility. Enable employees to configure workflows that make sense for your organization. Use personalization features to remove clutter from screens so they can focus on critical tasks to drive growth, reduce costs, improve quality, and improve profits with an extraordinary experience for customers and employees alike.

This playbook explores the world of modern-day manufacturing ERP applications like Acumatica. It shows how manufacturers can align information and workflows to drive significant improvements throughout every area of their production and back-office operations.



INTRODUCTION

Streamline Manufacturing with a Modern ERP Platform

Built on a modular and adaptable platform with Open APIs for rapid integration, Acumatica Manufacturing Edition is designed for the way manufacturing 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. All your manufacturing business processes share the same data, information is available anytime, anywhere, and everything revolves around the customer.

"We wanted to build something for the future, which is why we selected Acumatica in the end."

– SILVAIN BOUCHER, CEO, ERGORESEARCH LTD

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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 Business Events to automate email or text messages with automated activities based on system data. Send customers text messages when orders are ready for delivery or pickup or notify warehouse personnel of low stock for open orders.

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.

DOCUMENT MANAGEMENT

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

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, quality 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.



MANUFACTURING OPERATIONS

Operations managers, general managers, plant managers, and vice presidents of manufacturing must keep their pulse on operations to ensure maximum throughput, product quality, and employee safety. Acumatica provides manufacturing management with real-time, accurate information to stay on top of issues, take strategic actions, and manage operations by exception.

ROLES AND RESPONSIBILITIES

- Supervise daily manufacturing activities
- Manage manufacturing and material resources
- Work with human resources to manage job descriptions and fill open positions
- Develop and manage operational budgets
- Collaborate with IT on system improvement projects
- Oversee strategic customer and vendor relationships
- Work with engineering on development plans
- Collaborate with quality teams on metrics
- Manage labor resources and conflicts
- Develop and implement the operational plan

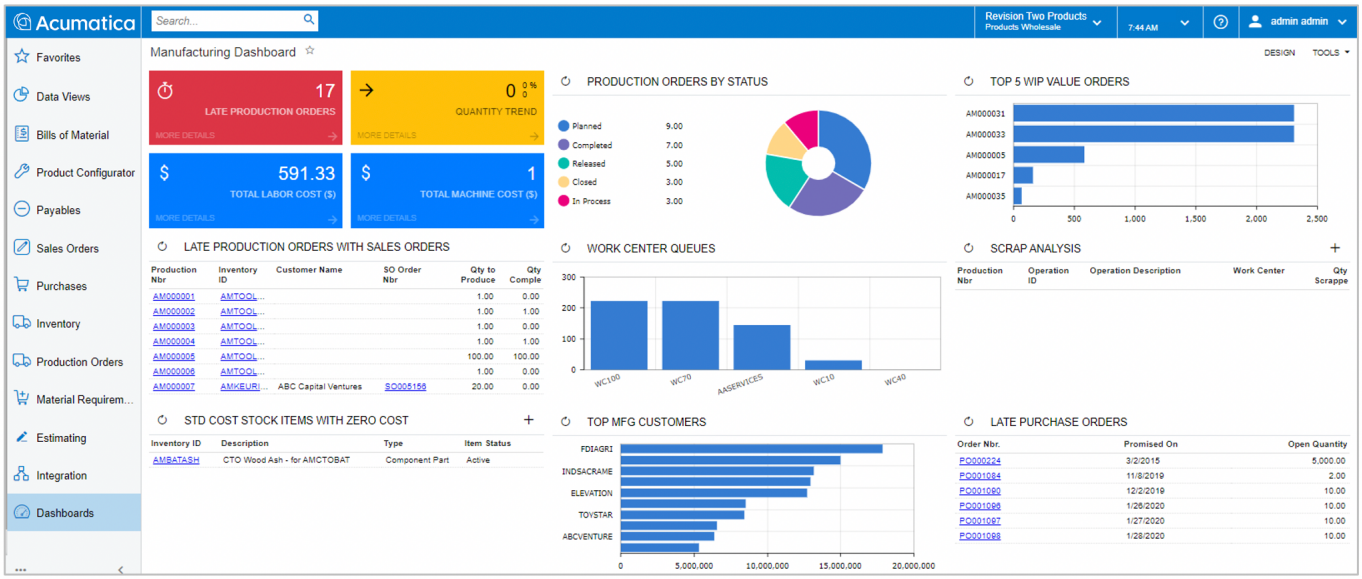
ACUMATICA FOR MANUFACTURING OPERATIONS

Manufacturing managers use configurable dashboards to identify underutilized and constrained resources such as machines, labor, or tooling. Manage schedules and material plans by exception with actionable information to resolve issues to maximize throughput. View production pipelines with summaries of manufacturing opportunities from CRM, open estimates, and quoted jobs. With Acumatica, you know exactly how much money is tied up in work in process (WIP) and how much you made on each order with notifications when things get out of control. Identify top customers and monitor operations in real-time on any device with native mobile applications.

"Managers can now drill-down within Acumatica and see where an actual number is coming from instead of having to asking accounting to find it."

– YURI DUROVSKIKH, IT MANAGER, OFS INTERNATIONAL

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Create dashboards to monitor production orders, spot overloaded machines and work centers, 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 safety, quality, and production results in real-time. View production schedules, drill into work in process, 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 manufacturing 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 manufacturing improvement projects such as kaizen, lean, or six sigma initiatives with the project accounting application, tasks, and embedded document management.

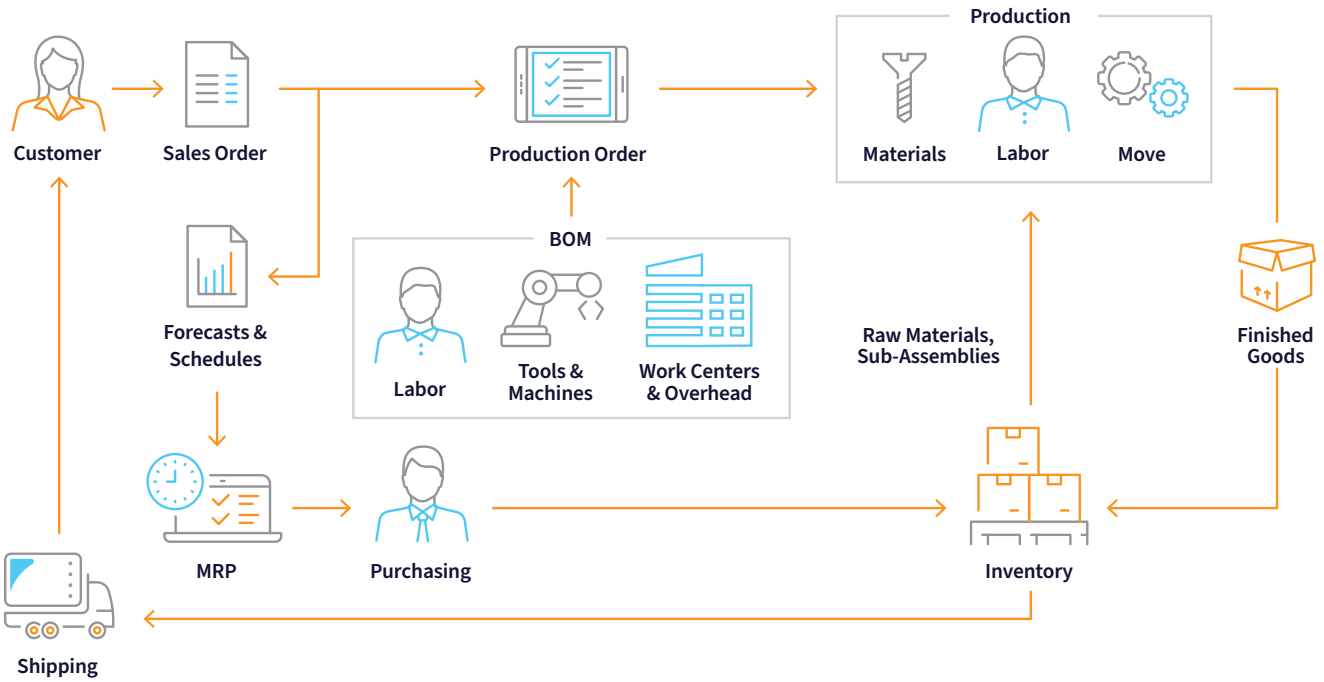
STAY CONNECTED

Never wonder what's 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] has given us better contact with our customers, because we've got it set up, so everything is being sent electronically out of the system . . . it's made the business process more fluid."

– JENNIFER MOORE, VP OF FINANCE, SCIESSENT

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Create custom workflows for manufacturing and inventory transactions with automation and built-in notifications via business events. Notify shipping when production is complete for high priority orders, alert purchasing automatically for low-stock items required for scheduled production orders, and build workflows to streamline the handoff from estimating to sales and production.



MANUFACTURING SALES

Most manufacturing ERP applications connect to CRM for sales automation, but few provide a 360-degree view of the business and access to manufacturing information from the sales application. Acumatica CRM connects sales with the information they need to manage opportunities effectively with increased win rates. Document every customer communication and streamline cross-departmental handoffs for new sales to production and accounting.

ROLES AND RESPONSIBILITIES

- Manage sales opportunities and quotes
- Nurture prospect and customer relationships
- Work with estimating for new part quotes
- Act as the liaison between customers and engineering for technical product information
- Negotiate pricing and discounts
- Assist finance with credit terms and collections
- Provide customers and prospects with estimated dates for product shipments
- Work with marketing to develop collateral and messaging to increase leads
- Work effectively in the office or on-the-road

ACUMATICA FOR MANUFACTURING SALES

Manufacturing sales reps, estimators, and technical sales engineers access a 360-degree view of account interactions with embedded CRM providing a centralized hub for account and contact information.

Leverage native email to send quotes to customers with embedded document management to store customer files such as product specifications, CAD drawings, and safety data sheets.

Create workflows to streamline business processes with manufacturing, estimating, customer service, and finance. Advanced capable to promise (CTP) calculations empower you with realistic dates for production based on material and resource availability. Stay connected with mobile apps for Android and iPhones.

"Recently when a salesman and I were looking something up, we pulled it up immediately because finding information in Acumatica is relatively straightforward and simple. He said to me, 'You realize what you just did would have taken us six hours in the old system.' That's just one of Acumatica's tremendous benefits."

– CHAD TREADWELL, VP OF OPERATIONS, FSC LIGHTING

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

GAIN INSIGHTS

Access personalized dashboards, powerful Generic Inquiries, and business analytics with drill-downs to source transactions. Build key performance indicators to measure and monitor sales results. Know what to do next with built-in tasks and email and text reminders.

COMMUNICATE EFFECTIVELY

Log phone conversations in CRM and send emails directly from Acumatica. Email links to files and records to streamline employee communication for accounting, engineering, estimating, and manufacturing. Empower customers with online, self-service portals and automated account statements, and other reports.

MANAGE YOUR PIPELINE

Automated lead assignment makes it easy to know which opportunities are in your sales queue. Configure sales stages to move prospects through the buying process quickly and efficiently. Automated workflow can kick unqualified leads back into the marketing queue for nurture marketing campaigns.

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, access order details and account history for price negotiation, and see invoices and payments for customer accounts.

STREAMLINE QUOTES

Capture details required for manufacturing estimates and configure finished goods with the rules-based product configurator for part designs and pricing. Use capable-to-promise (CTP) to know when you can promise a quantity of products for customer quotes or how much you can ship by the requested date. Automate quotes with electronic signatures via DocuSign integration.

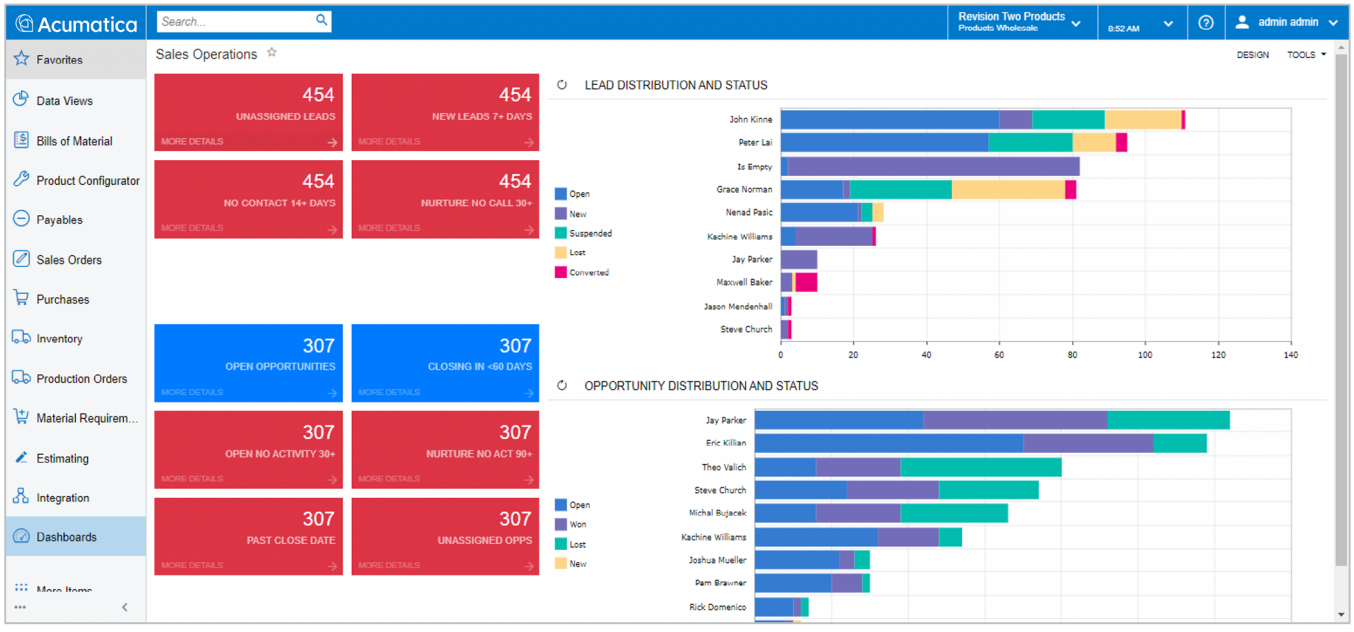
STAY CONNECTED ANYWHERE

Use Android and iPhone mobile apps to access CRM and other Acumatica tasks and activities on the road. Create time cards and submit expense receipts electronically anytime, anywhere, on any device.

"When we talk about Acumatica, it's not just about accounting but about where we do all our business. We work in Acumatica and don't need to leave."

– SCOTT STARKWEATHER, PRESIDENT, BOULDER CREEK STONE

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Build custom dashboards for sales operations, sales managers, and sales representatives to measure and monitor marketing and sales activities in real-time with embedded CRM connected to sales, inventory, manufacturing, and accounting applications.



PRODUCTION MANAGEMENT

Production and manufacturing managers and shift supervisors demand access to accurate and timely information to manage production effectively. Modern ERP applications like Acumatica provide a holistic view of every corner of your shop, from production orders to work in process and job costing to resource constraints and labor shortages. Acumatica provides everything manufacturing leadership needs to manage production with mobility to keep tabs on operations even when off-site or on the road.

ROLES AND RESPONSIBILITIES

- Work across production and planning teams to maximize resource utilization and throughput
- Manage production teams resolve issues and ensure staffing for required labor operations
- Monitor production orders to ensure maximum profitability
- Approve employee time and expense entries and requisition requests
- Prepare production reports and cost analysis for executive management teams
- Implement continuous improvement projects
- Work with HR on training and recruitment

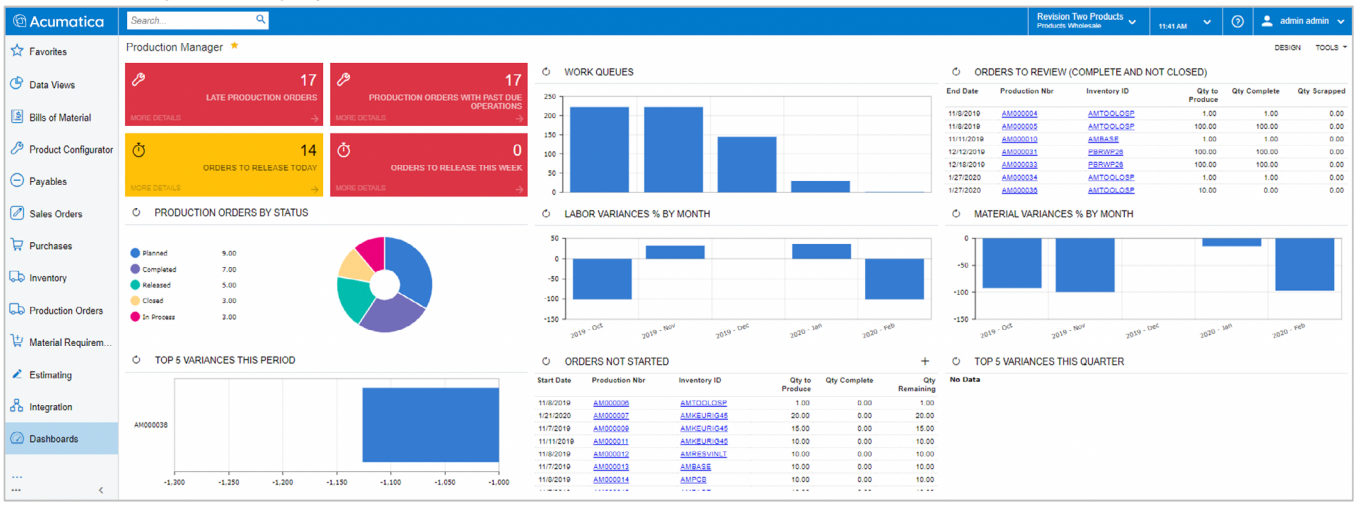
ACUMATICA FOR PRODUCTION MANAGERS AND WORKERS

Production and plant managers rely on insightful dashboards to monitor WIP, spot bottleneck resources, and harmonize supply and demand with real-time business insights. Know when machines break down and identify high scrap and cost variances in real-time. Shop employees know what's coming next with work center dispatch reports and barcoded shop floor travelers. Empower employees with intuitive mobile applications to clock-in and clock-out of production and report production in real-time using the Manufacturing Data Collection application.

"Acumatica helps us make sure all components are reflected accurately in inventory. It also makes sure we know what each component is related to what light and accurately reflects the true cost of a kit assembly."

– SHIVANI RAVAL, DIRECTOR OF OPERATIONS, FIDELUX

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Build custom dashboards to manage every aspect of your manufacturing process by exception with detailed information, key performance indicators, and email notifications.

LABOR MANAGEMENT

Use schedules to understand staffing needs. Adjust resource schedules, increase crew sizes, or add another shift to increase capacity to meet fluctuating demands. Dispatch lists and shop travelers arm shop employees with information to maximize production output. Incorporate training and multimedia with wikis to improve quality, minimize scrap, and reduce the time it takes to ramp up new employees.

COST CONTAINMENT

Know the true cost of every production order with detailed work in process and job cost reporting. Set up alerts for high-cost variances.

PROJECT MANAGEMENT

Use embedded project management to coordinate continuous improvement projects, kaizen events, and quality or lean manufacturing initiatives. Assign project tasks and monitor projects through to completion.

RESOURCE PLANNING AND SCHEDULING

Keep tabs on material planning and resource scheduling with dashboards, reports, and alerts. Identify problems before they hit the shop floor and resolve issues related to low inventory stock and production bottlenecks with real-time, connected data.

RESOURCE UTILIZATION

Create dashboards, reports, or Generic Inquiries to chart resource utilization for machines, work centers, tooling, and labor. Set up email or SMS text alerts to notify management when production orders are running late, or machines are reported as down.

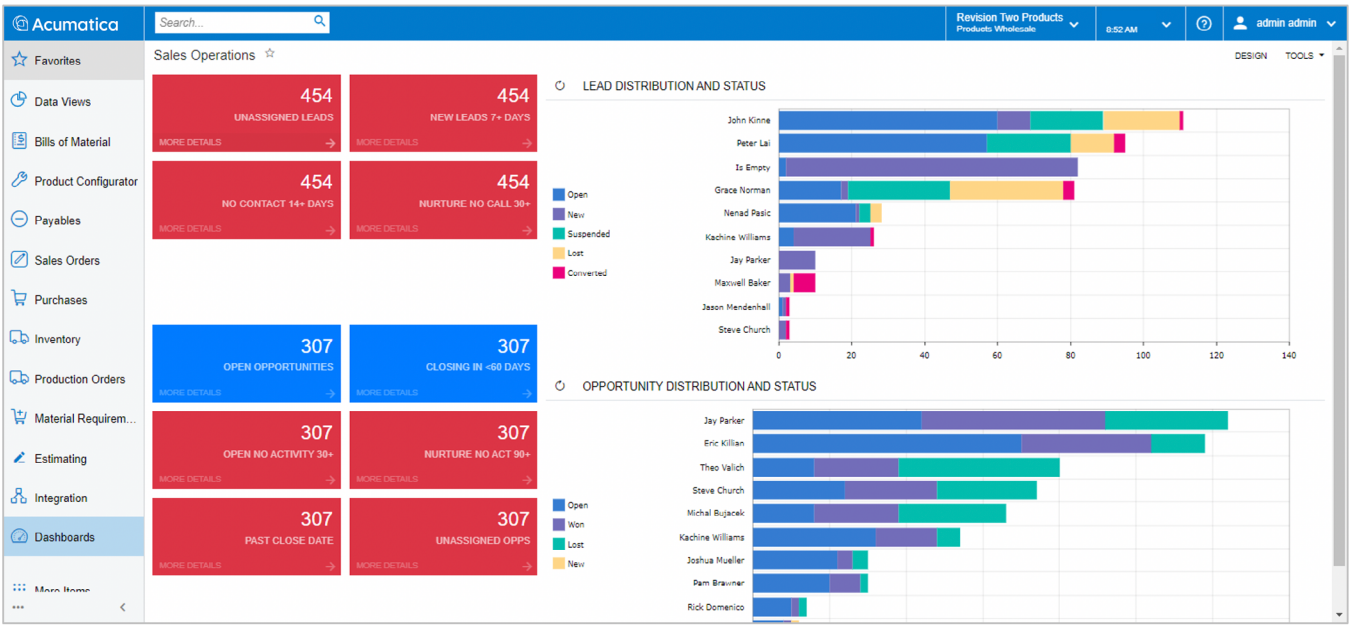
MANAGE EVERYTHING, ANYWHERE

Use Android and iPhone apps to monitor operations anywhere in your facility or while you are traveling between locations. Approve timecards and expenses and access reports and notifications in real-time.

"Everything has to be traceable because if anything goes wrong at the customer location, we need to know how to resolve it. Only Acumatica could allow us to integrate all of this information."

– DAVID GREEN, VP OF OPERATIONS AND YURI DUROVSKIKH, IT MANAGER, OFS INTERNATIONAL

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Build custom dashboards for sales operations, sales managers, and sales representatives to measure and monitor marketing and sales activities in real-time with embedded CRM connected to sales, inventory, manufacturing, and accounting applications.



RESEARCH AND DEVELOPMENT

Chief Technology Officers (CTO), engineering directors, product managers, and manufacturing engineers often work outside the ERP application in CAD or product lifecycle management (PLM) applications. However, much of the information they need is stored in the ERP database. Research and development managers and staff rely on connectivity between engineering and ERP applications to shorten the engineering to manufacturing handoff while ensuring that engineers have information to optimize product designs as part of the design for manufacturing (DFM) process.

ROLES AND RESPONSIBILITIES

- Oversee research and development for new and existing product designs
- Review engineering change requests (ECR) and engineering change order (ECO) processes
- Collaborate with customers, quality managers, and production leaders on design improvements
- Create and manage on-going changes to manufacturing routings and bills of material
- Manage configuration settings for configure-to-order products built with a rules-based product configurator
- Provide technical expertise to the engineering staff, sales, and manufacturing team members

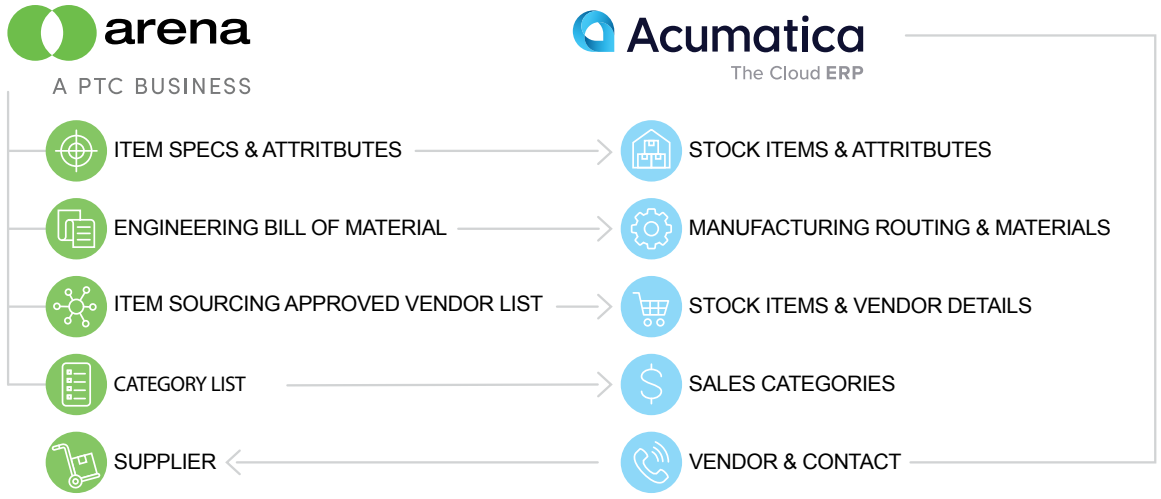
ACUMATICA FOR RESEARCH AND DEVELOPMENT

Connectivity between CAD and product lifecycle management (PLM) applications and back-office ERP systems is historically weak. Acumatica is one of the few midmarket manufacturing ERP applications that supports both engineer-to-order and configure-to-order manufacturers. Bidirectional connectivity to PLM and a native, rules-based product configurator help engineers streamline the product design process.

"We framed our entire quality management framework around Acumatica, from document management to update processes. It was so well-integrated, the auditor had fantastic feedback, particularly on our document management."

– NATHANIAL FAIRWEATHER, MANAGING DIRECTOR, TRIODE

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The Acumatica for Arena Native Connector provides connectivity between Arena and Acumatica to update inventory items, bill of materials, vendors, and other information across applications.

CONNECT ERP WITH PLM

Automate synchronization of engineering bill of material, revisions, and items from Arena to Acumatica manufacturing bills of material and inventory items. Manage the entire product lifecycle inside Arena's cloud-based platform with native connectivity to Acumatica inventory and manufacturing applications.

IMPROVE DESIGN FOR MANUFACTURING (DFM)

Unlimited user licensing enables manufacturing and mechanical engineers to review items, routings, and bills of material information inside Acumatica to improve manufacturing design processes.

STREAMLINE REVISION WORKFLOWS

Manage engineering change requests and engineering change notifications with the native Engineering Change Control application with flexible approval workflows. Acumatica for Arena Native Connector provides advanced product lifecycle management features.

MONITOR ENGINEERING IN REAL-TIME

Use the engineering dashboard to monitor engineering change requests and engineering change orders. Manage teams with task assignments or work inside Arena with advanced workflows for complete product lifecycle management across your entire product portfolio.

CREATE RULES FOR PRODUCT CONFIGURATION

Acumatica matrix items enable manufacturers to create entire product families quickly from attributes such as size, style, color, or material. Create configuration rules to generate new manufactured finished goods using validated lists, formulas, and other settings to produce a custom bill of materials, routings, costs, and pricing.

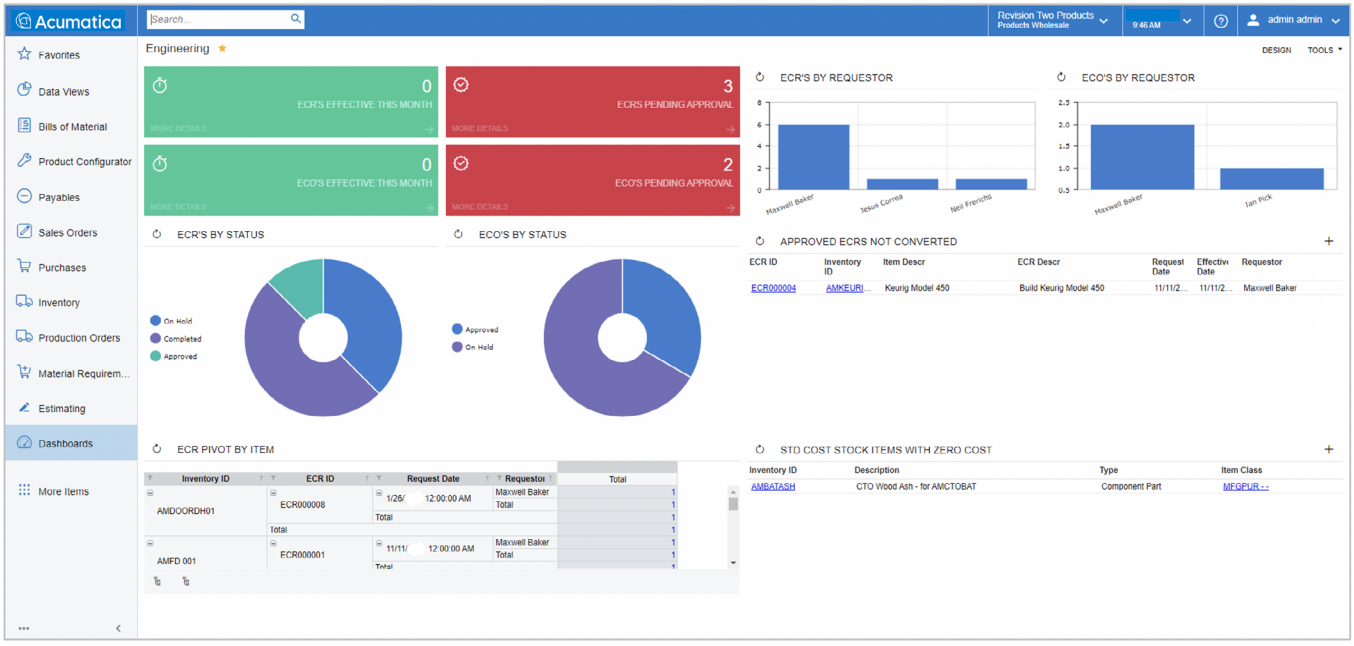
MANAGE FILES

Leverage embedded document management and native integration to Box to manage large files. Acumatica for Arena Native Connector provides additional file management capabilities for engineering CAD drawings.

"If you are a midsized business that desires to grow and has the need to unify your locations, Acumatica brings this amazing gain; it connects people. In today's world we need communication, and Acumatica provides the ability to have information at your fingertips that's unified and delivered fast."

– ELENA MHEIDZE, CFO, ERICKSON INTERNATIONAL

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Configure engineering dashboards to monitor the status of engineering change requests and engineering change orders. Connect to data inside external applications such as product lifecycle management and create approvals workflows with mobile approvals on iPhone and Android smartphones.

OTHER MANUFACTURING ROLES

Every manufacturing employee plays a vital role in the success of your organization. Acumatica Manufacturing Edition is a comprehensive business application providing a singular platform to connect employees and work-flows across departments. Connected and native applications offer a seamless business platform for quality control, maintenance, service, and shop floor personnel with real-time information to harmonize every area of your business down to the machinist, inspector, or service technician.

"We were looking for something that gave us as many options as possible. Our company today won't be the same five years from now. We're not stagnant; not locked into policies, procedures or software. Everything we do is with the long-term perspective in mind, and we need an ERP system that can evolve with us . . . Acumatica has an open platform, which was a huge selling point. The company looks for outside innovation and to work with as many ISV's as possible to provide a multitude of solutions. We believe in that ethos because that's how we operate."

– FRANKLIN SHIRAKI, CFO, FIREWIRE SURFBOARDS

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QUALITY CONTROL



Connected marketplace applications built in the Acumatica framework provide a total quality management suite for testing and recall, inspections and checklists, non-conformance (NC) and corrective and preventative actions (CAPA), quality data collection, and vendor performance and supplier management. Capture quality tests for virtually any inventory or manufacturing transaction to ensure the highest product quality.

MANUFACTURING ESTIMATOR



Create estimates and quotes from scratch or by copying existing estimates. Maintain flexibility with markups on labor, materials, overhead, and other cost elements. Acumatica's Manufacturing Estimating application helps estimators to improve win rates while maximizing profits.

SERVICE MANAGERS



The Service Management application empowers service leaders and field technicians to manage installation and repair orders with mobile applications to connect remote workers with internal service managers. Equipment Management is essential for managing maintenance contracts and warranties and viewing equipment history for customer or company-owned equipment.

SHOP FLOOR WORKERS



Shop floor travelers, resource dispatch lists, and the mobile Manufacturing Data Collection application provide everything shop floor workers need to report time and process materials for production orders.

PREVENTATIVE MAINTENANCE



Take down machines or work centers for maintenance or use marketplace applications for advanced preventative maintenance of manufacturing equipment and facilities.

PRODUCTION SCHEDULER



Schedule open work orders against finite capacity constraints with Rough-Cut-Capacity-Planning (RCCP). Block-out times for planned preventative maintenance and use reports, notifications, and dashboards to improve throughput, reduce machine setups, and maximize resource utilization.

MATERIAL PLANNER



Use demand forecasts, lead times, and replenishment settings to streamline the material planning process. Setup notifications for inventory shortages for planned production orders and expedite shipments to meet customer commitments armed with real-time information.

Empower Manufacturing Executives and Managers with a Future-Proof, Role-Based ERP Application

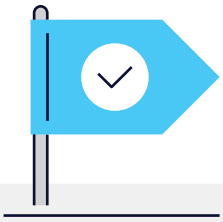
Manufacturers using legacy ERP systems rely on multiple disconnected systems and manual processes. Data silos and disjointed workflows create barriers to growth, limiting executives from managing their businesses effectively.

Acumatica Manufacturing Edition provides manufacturing executives with real-time, accurate information to stay on top of issues, take strategic actions, manage operations by exception, and contain costs. Know what's happening at every step in the process, from sales to production and accounting.

Create role-based dashboards and configure approvals workflows to manage the most complex processes. Drill into information to discover what's happening and set up email or text alerts to monitor your team with real-time access to data in the office or on the road with native mobile applications for iPhone and Android devices.

Acumatica Manufacturing Edition is designed for make-to-stock, make-to-order, batch process, and project-centric manufacturers. Acumatica provides unparalleled manufacturing depth with an extensive suite of connected manufacturing business applications for production, estimating, engineering, material planning, scheduling, and product configuration.

Acumatica provides the best business and industry management solution for transforming your business 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 an unparalleled experience for users and customers alike.



"I would definitely recommend Acumatica to other businesses. It covers the full ERP functionality, it integrates with other products well, and it's cost-effective."

DEREK SZABO
MANAGING DIRECTOR
DEVILS PEAK BREWING

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.