Professional Services Edition

Professional services firms face challenges that can hinder growth and profits. Acumatica designed the Professional Services Edition (PSE) to help these small and midsized firms holistically manage projects, finances, and resources from opportunity to project close.

- **Project Accounting & Financials**
- **Project Management**
- **Flexible Billing Options**
- **Resource Planning**
- **Embedded CRM**

Key business benefits

- Gain full project visibility from opportunity to project close.
- View project profitability in real-time and adjust budgets as needed mid-project.
- Generate invoices on project milestones or completion percentages.
- Track client interactions and improve collaboration with embedded CRM.
- Allocate resources and assign project tasks related to staff, equipment, and technology.

Related resources

- How to Calculate Software ROI
  > LEARN MORE
- Professional Services Infographic
  > LEARN MORE
- Schedule a Personalized Demo
  > LEARN MORE

Enhance Productivity and Deliver Real-Time Project Visibility

Timely project data is critical to today's professional service business. It drives strategic decisions that move projects and your business forward. Yet, disconnected teams and siloed workflows often cause delays, limit project visibility, lead to resource misallocation, and result in budget overruns.

Acumatica Professional Services Edition is purpose-built to tackle these challenges head-on. From streamlining quote-to-project setup to managing industry-specific billing structures and customer support, Acumatica delivers the tools you need to overcome inefficiencies and thrive.

With Acumatica, you gain unparalleled visibility into customer, project, and company performance through intuitive drilldowns, customizable reports, and award-winning usability. Born in the cloud and designed for a dynamic, digital-first world, Acumatica's platform integrates financial and operational data with project and resource management, time and expense tracking, and a robust embedded CRM. One centralized data hub is designed to foster communication and collaboration from opportunity to project completion.

Our business management solution includes project accounting, compliance management, and AI-driven workflow automation, enabling your business to meet today's challenges and seize tomorrow's opportunities. Built to scale with growing firms, Acumatica adapts to your evolving needs, ensuring your business remains secure and future-ready.

"We can issue or create 20 to 30 brand new projects every morning and limit who gets assigned to what job. Acumatica is not only a management tool, but we can use the data for profit analysis."

–James Craig, CEO (former), Industrial Specialty Services

> CUSTOMER STORIES

Financial Management

Robust financials are simple enough for smaller firms yet scalable for more complex needs. Acumatica Financial Management has standard financial processes (GL/AP/AR) and reports. Multi-company, multicurrency, intercompany accounting, fixed assets, cash management are also available.

Project Accounting

Easily manage AP workflows, from entering an invoice through approval routing and checks. Seamless customer billing, driven by real-time project costing, includes up-to-date labor, material, equipment, and other costs. Identify problem areas in current jobs and improve future project estimates.

Project Management

Manage and track all activities, issues, and changes from a single data entry point. Use the Project 360 Dashboard for an immediate overview of key project details. Use side panels to view key project data quickly and comprehensively without leaving the current window. Generate custom reports and dashboards for data visibility and analysis.

Progress and Milestone Billing

Flexible progress billing by percentage of completion or by quantity reduces project owner risk. Access AP cost transactions related to progress billing lines from the pro forma side panel for timely vendor payments and increased billing accuracy. Tie revenue recognition to project milestones or deliverables.

Project Planning and Resource Management

Ensure resource availability to assign staff, equipment, and technology by team, department, and timeframe. Allocate tasks and workflows to manage project resources and link costs to the project budget. Real-time cost tracking offers precise budget, financial, and profit analysis.

Customer Relationship Management

Embedded CRM empowers professional services firms to keep detailed records of client interactions, proposals, manage contracts, payments, renewals, and compliance documents. The self-service portal streamlines communication with push notifications, giving customers access to support cases and payment options.

Field Reporting and Mobility

Ensure everyone has the same project data from the field or anywhere they work. Access the complete system over any device and locate all project details from one global search box. Boost operational efficiency with standard reports that include time-sensitive filters for cash flow, profitability, committed and forecasted costs, and overall project status.

Time and Expense Management

Capture time and expense from any device. Time entry flows to project accounting for costs and expenses related to projects or specific project tasks. Billable activities can be marked up depending on the project, task, employee, or activity performed. Boost productivity and payroll accuracy with integrated clock-in and clock-out features.

Payments

Integrated payments solution automates AR processing to reduce back-office workloads and get paid faster. Advanced features like click-to-pay links, a self-service portal, and automated AR processing further enhance convenience, efficiency, and security.

Change Management

Control cost overruns by automating project commitments and change order processes. Manage back charges or reduction in vendor commitments through the entry of a negative change order. Streamline change orders for multiple projects with unit rate changes, custom retainage, and cost-only change requests.

Project Cost and Revenue Tax Zones

Specify tax calculations directly in the project and automatically retrieve and calculate all invoices, purchase orders, subcontracts, and expenses.