

# Professional Services Edition

**GROW WITH A MODERN PROJECT-CENTRIC ERP PLATFORM**



“Our operation managers are analyzing their profits and losses much better. We are able to look at which projects we are not doing well on—talk about those—and figure out how to do things differently next time and not make the same mistakes.”

**Gary Gardner, CEO, Industrial Specialty Services**  
Industry: Engineering and Technical Solutions



## Professional Services

Acumatica Professional Services Edition is a comprehensive modern cloud ERP application with project management, project accounting, and resource management. Embedded CRM gives firms detailed records of client interactions, proposals, contracts, and payments. Empower clients with the ability to access service and support cases from the self-service portal.

Its superior mobile capabilities arm employees in the field with time and expense tracking, and real-time project data using role-based dashboards. The user-friendly platform includes flexible billing, including milestone, fixed-price, or time and material billing, coupled with change management, and robust

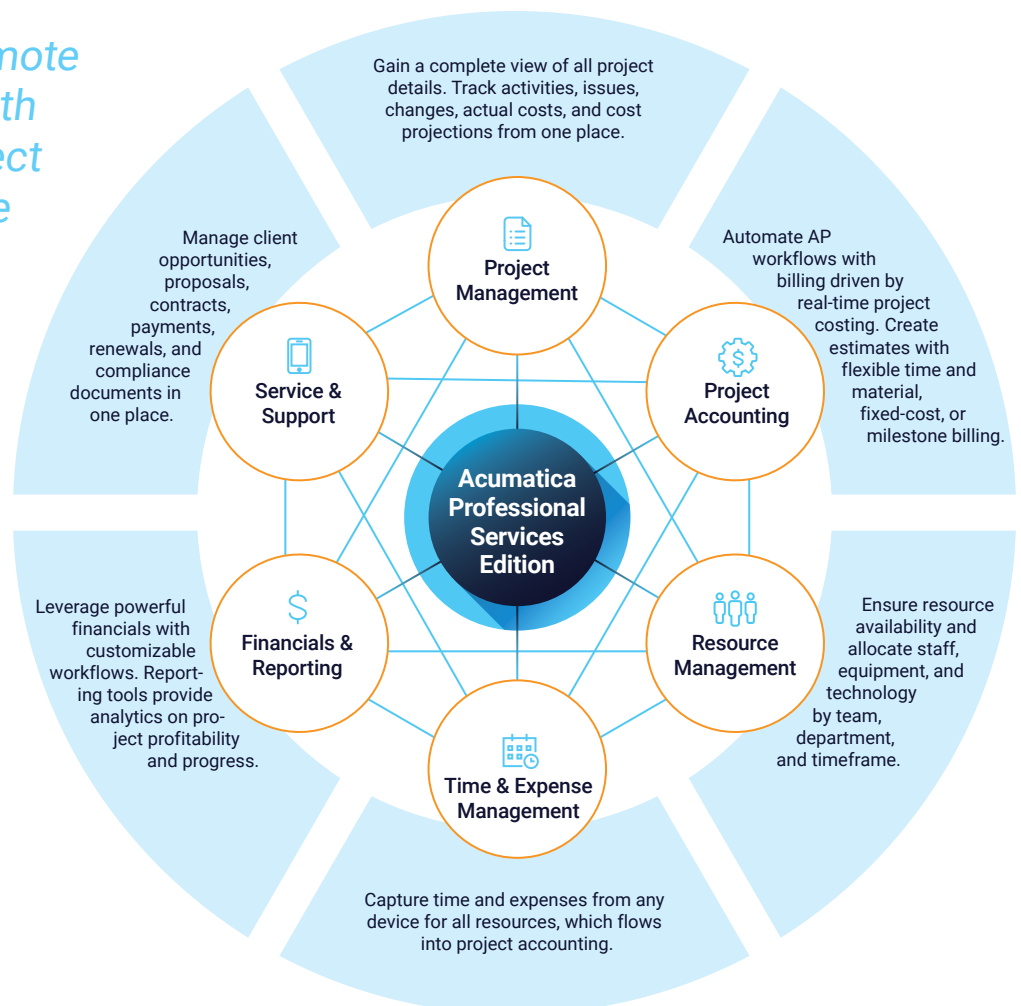
financials with forecasting, payroll, and cash management. Manage the process of recognizing revenue with automation workflows. Dashboard drilldown reports easily identify changes in project scopes, labor, materials, and equipment.

Connect to popular applications for a platform that is tailored to your organization's complex and evolving business needs. Automate routine tasks and improve data processing for accounts payable and other business operations with native artificial intelligence and machine learning. Optimize resource allocation and eliminate project timeline delays with a complete professional service solution.

*Connect office and remote workers in real-time with cloud and mobile project management, resource allocation, and accounting software.*

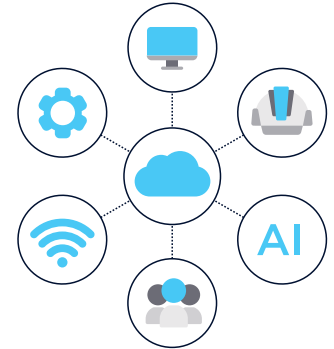
"Acumatica definitely positions us for growth. The way we were doing things was outdated. Acumatica better aligns with our growth path and ever evolving business needs."









**Randy Gieseck, President,  
Safety Management Group**  
Industry: Professional Services



## A to Z Functionality for Professional Services

Organizations in the professional services industry navigate a multifaceted and complex business environment that traditional ERP platforms cannot support. Acumatica allows you to grow and evolve with a scalable, secure, and mobile cloud platform. Acumatica's all-in-one solution connects every part of your business—from estimates and proposals, to project and resource management, to field service support. Automate change order workflows and project issue notifications and connect field and office teams in real-time. Gain company-wide visibility into project budgets vs. actual costs, commitments, schedules, and contracts—allowing for tighter project controls and time and money savings. Attach documents and files to projects, comply with industry regulations, and stay informed with daily field reports and mobile access to project. Streamline financials with native payroll management and flexible contracts. Thrill clients with a self-service portal for access to support cases and better communication.



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**Architectural Firms**  
 Design-Build/Construction Management, Architectural Services
- 
**Engineering Firms**  
 Civil, Electrical, Industrial, Mechanical, Structural
- 
**Surveying Firms**  
 Surveying
- 
**Business Services**  
 Consulting, Business Management, Advertising, Marketing
- 
**Safety and Security**  
 Security System Monitoring, Safety Management and Training
- 
**Technology Services**  
 Managed Computer and Application Services, Audio Visual Installation
- 
**Utilities and Communication Services**  
 Electrical, Water, Solar, Energy, Telecommunications, and Other Services
- 
**Other Services**  
 Staffing, Legal, Accounting, and Other

**Acumatica** | Search... | Revision Two Products | Products Wholesale | 12:55 PM | admin admin

**Project Manager**

- ACTIVE PROJECTS: 10
- LATE PROJECT TASKS: 4
- PROJECTS, LOW BILLING RATIO: 1
- UNDER UTILIZED EMPLOYEES: 9
- OVER BUDGET PROJECTS: 1
- UNPROFITABLE PROJECTS: 3
- MY TASKS: 5
- MY OVERDUE TASKS: 3

**BUDGET - EXPENSES (ACTIVE PROJECTS)**

Project	Amount
THRO3	-10,000
PRO0000009	-5,000
FXEDP05	2,000
THRO2	3,000
BUDGETBYM	4,000
FXEDP06	5,000
REVRECO0	6,000
REVRECO1	7,000
INTRK0	8,000

**EXPENSES VS BUDGET (ACTIVE PROJECTS)**

Description	Created Date	Original Budgeted Amount in Base Currency	Hist. Act Amount in Base Currency
T&M project with inventory issue	1/18/18	98,340.00	96,300.00
Martin Beverage Process Re-architecture	1/18/18	9,920.00	18,812.00
Revenue reconciliation based on labor	1/18/18	11,250.00	2,814.00
Internal marketing campaigns for 2018-2019	11/5/18	20,000.00	6,850.00

**EST PROFIT % BY PROJECT**

**GROSS PROFIT BY PROJECT**

**CONTRACT STATUS BY PROJECT**

Manage your business by exception with real-time, accurate, and complete finance, operations, and project data available anytime, anywhere, on any device with Acumatica Professional Services Edition.

## Professional Services Edition Features

### RESOURCE MANAGEMENT



Resource Allocation



Time & Expense Management



Scheduling

### PLANNING



Estimates



Forecasting



Proposals



CRM



Reporting & Analytics



Planned vs. Actual Costing

### PROJECTS



Project Management



Project Accounting



Time & Expenses



Automated Workflows



Change Control



Daily Field Reports

### FINANCIALS



AP/AR



General Ledger



Cash Management



Revenue Recognition



Milestone Billing



Payments

### SERVICES



Self-Service Portal



Contract Management



Support Cases



Compliance



Appointment Scheduling



Document Management

### ACUMATICA CLOUD PLATFORM



Advanced Authentication



Low Code / No Code Framework



Cross-browser Support



Integration & Web Services



Multi-tenant



AI & ML



Mobile Framework



Role-based Security

## Connect Remote and Office Staff

The ability to collaborate across departments and projects is critical for any business. Acumatica's robust cloud-native design and mobility power work forward for project staff, regardless of location. Business leaders monitor multiple projects, and empower remote time entry and expense management. Managers can access real-time project information from any connected device including estimates, proposals, forecasting, resource management, and scheduling.



## Extend Acumatica with Certified Applications

The Acumatica Marketplace is a leading community of independent software vendors. Connect your application to an extensive list of certified plug-and-play applications for advanced reporting, estimates, proposals, human resources, and workforce management.



**ProjectManager**

*included in the Professional Services Edition as a complete Project Planning and Resource Management tool.*

**Velixo**

**Avalara**

**workforce go!**

“Acumatica has exceeded our expectations. From a technology and operations point of view, Acumatica ticks all the boxes: It’s engaging for users, flexible to meet your needs, and grows with you as a business.”

**Chris Drake, COO, Smartnumbers**  
Industry: Software & Technology

**Discover Why Top Professional Services Companies Rely on Acumatica for their Success**



**LAUNCH THE VIEWER**





## An Innovative Cloud Platform Ready for Modern Technologies

Today's professional service industry demands an ERP platform that ensures scalability and personalization. The ability to integrate new technologies that facilitate growth without extensive IT costs is essential for companies to gain the competitive edge they need to thrive in today's environment.

The Acumatica cloud platform is a versatile architectural framework and application development platform that empowers companies to tailor the software to the way they do business. Acumatica's open architecture provides open APIs, protocols, and tools organizations need to continually incorporate new capabilities into their

platform without disrupting other functions. Machine learning and artificial intelligence automate manual tasks and streamline processes. Low-code or no-code development tools let organizations easily incorporate third-party applications and modern technologies into their ecosystem.

Personalized settings promote an intuitive experience for each user. Customizable reports and dashboards put KPIs and deadlines on top of each user's list of priorities. On-the-go mobility enables users to complete their work wherever they are and enjoy the same intuitive experience regardless of the device.



User-friendly dashboards provide access to crucial project and company-wide data, enabling immediate action and faster issue resolution.

## The Trusted Leader in Usability, Mobility, and Value

Acumatica's [Customer Bill of Rights](#) protects customers with an easy-to-understand End User License Agreement. It guarantees ERP implementations without hidden fees. The Bill of Rights outlines Acumatica's commitment to consumption-based licensing that does not inhibit growth. It provides sustainable pricing models with limited price increases, deployment choice, and consistent customer service access. It also protects customers' access to their data, so they can retrieve it at any time.

Further, Acumatica is consistently [rated high](#) in both usability and value by industry analysts and users. Acumatica was recognized by G2 for Best Relationship, Project-Based ERP, Summer 2024, and Best Estimated ROI, Summer 2024. Acumatica also received the highest honors in the Best ERP Solution CODiE award for 2024.

In addition, Acumatica continues to earn TrustRadius awards, most recently the TrustRadius Top Rated badge. Acumatica also rates consistently high with Nucleus Research and is a Leader in the G2 Mid-Market Grid Report for ERP Systems. Acumatica maintains a near-perfect Overall User Rating on the Gartner Peer Insights report.

"It's all about how Acumatica listens to you and how quickly they respond. They really do want to hear from users to understand our business processes so they can incorporate new features and enhancements to make things even easier. It's just amazing!"

– KELLY BURNS,  
ERP DEVELOPER &  
FORMER CHIEF  
OPERATING OFFICER,  
M3 TECHNOLOGY GROUP

[LEARN MORE >](#)



<b>Acumatica by the Numbers:</b>	<b>10,000+</b> Valued Customers	<b>+32</b> High Net Promoter Score
	<b>200M</b> Transactions Every Month	<b>290</b> Global ISVs
	<b>95%</b> Retention Rate	<b>350+</b> Channel Partners
	<b>650+</b> Dedicated Employees	<b>1</b> Unique Singular Product Focus

## How to Calculate Your Return on Investment.

[CALCULATE YOUR ROI](#)



Having opportunities in CRM gives us visibility into the sales project pipeline where we can see in real-time what's close to closing as well as what's in the pipeline.”

**Brian Rowerdink, Controller, Security Solutions**  
Industry: Security Services



## 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](http://www.acumatica.com) or follow us on [LinkedIn](#).