

Transforming ERP for the Intelligent Business Era

# Acumatica's AI-First Product Strategy

## Introduction

In today's fast-paced and dynamic landscape, for small and medium-size businesses (SMBs) to stay competitive and grow, they need to embrace leading-edge technologies. Dramatic breakthroughs in Artificial intelligence (AI) are at the forefront of a new era of business transformation, offering exciting possibilities for enhanced productivity and data driven decision making.

Embracing new technology has long been a strategic imperative for SMBs. Yet, the potential impact AI can have on the way organizations work and operate can be overwhelming, leaving business leaders and employees frustrated by its complexity, anxious about costs and potential disruptions, and worried about the security and privacy of their data. Despite these concerns, business leaders understand that to stay competitive and innovate, they need to smartly embrace the transformative potential of AI.

This solution brief offers SMB leaders a helpful overview of how Acumatica's approach to AI can help address their real-world challenges in a practical and responsible way. The brief explains Acumatica's strategy of leveraging AI to deliver practical value without added complexity. With an open and flexible platform designed specifically to help organizations seamlessly incorporate new technologies, Acumatica is the best business management solution to help you unlock AI's transformative potential—empowering you to thrive in today's competitive marketplace.

# AI-First Product Strategy

Unlike too many vendors who merely add AI to existing (and often, outdated) features, Acumatica's AI-first approach is unique. We embed AI at the core of our product development, focusing on solving business problems from the ground up. This strategy results in [practical AI](#) functionalities that integrate seamlessly into existing workflows and are tailored specifically to the unique needs of SMBs.



By thoughtfully integrating intelligent capabilities into our modern cloud platform, Acumatica delivers practical, responsible, industry-specific AI solutions. These solutions enhance human expertise with meaningful, reliable results—empowering you to shape and control your future.

- Build AI directly into existing workflows with an intuitive user interface.
- Rapidly integrate emerging AI capabilities with a cloud-native platform.
- Solve real business challenges with industry-specific AI applications.
- Maintain data control and ownership.

## AI as a Performance Enabler

Achieving peak performance is critical for any business seeking to optimize efficiency, speed, cost savings, and growth. Acumatica leverages AI to significantly enhance organizational performance by integrating real-time, accurate data with advanced insights and forecasting capabilities. This integration supports strategic planning and resource allocation while ensuring data security and privacy.



### Key Enablers of Performance:

- **Data and Insights:** Delivering real-time, accurate data is foundational to Acumatica's Cloud ERP system. When combined with AI-driven insights and forecasting, you can engage in effective strategic planning and resource allocation.
- **User Experience and Automation:** Acumatica's Cloud ERP solution is an extensible platform with a user-friendly interface to enable rapid solution development and ease of use. AI-driven workflow automation further boosts your efficiency and productivity by streamlining repetitive tasks and reducing the need for manual intervention.
- **Integration:** Seamless integration with various systems ensures a cohesive user experience, enhancing your overall operational efficiency.

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We're building AI directly into our existing workflows, including at the industry level. We're leveraging the power of our cloud to integrate rapidly changing AI capabilities, bringing them to you. We're doing all of this while maintaining our foundational principles of customer data ownership and data control.”

– John Case, Chief Executive Officer, Acumatica

# AI That Works for You

Acumatica's AI strategy focuses on creating "AI that works for you," with practical applications that enhance business operations. The strategy consists of delivering new AI capabilities in three key areas:



- 1. Intelligent Advisor:** Delivers deep insights and identifies pressing issues, offering actionable suggestions to address them. This tool helps you make informed decisions and proactively tackle challenges.
- 2. Interactive Assistant:** Transforms the way you interact with Acumatica's Cloud ERP system. Designed to be intuitive and efficient, this capability offers a more human-like interface, making your engagement with the system smoother and more enjoyable.
- 3. AI Automation:** Automates tasks with or without human intervention to boost overall operational efficiency, allowing you to focus on more strategic activities. Examples include:
  - **Invoice Categorization:** Automates the categorization of invoices, reducing manual effort.
  - **Anomaly Detection:** Identifies anomalies in data, helping you address potential issues proactively.
  - **Text Autocomplete:** Enhances your user experience by predicting and completing text inputs.

## Trust and Security

As AI becomes an essential part of your business, our [Principles of Innovation](#) are more important than ever. Trust and security are central to Acumatica's AI strategy and our privacy-by-design principles ensure we use native, private large language models (LLM), so your data remains isolated from public training models. Each implementation undergoes rigorous security measures, giving you the confidence to scale AI adoption at your own pace while protecting your sensitive data.



## Our AI Vision and Future Direction

Leveraging AI allows your company to anticipate market changes, optimize resources, and enhance decision-making. As technological capabilities and your needs evolve, AI has the potential to transform operations across various sectors. The possibilities are limitless.



- **Distribution:** AI-driven inventory replenishment and shipping date predictions to streamline logistics, ensuring timely delivery and optimal stock levels.
- **Manufacturing:** Capacity planning and inventory forecasting powered by AI can enhance production efficiency and reduce downtime.
- **Construction:** Project estimation and workforce performance analysis using AI can improve project management and resource allocation.
- **Retail and Commerce:** Personalized product recommendations, dynamic pricing strategies, and support bots can enhance customer experience and drive sales.
- **Financial Services:** Enhanced invoice categorization and anomaly detection can improve financial accuracy and fraud prevention.
- **CRM:** AI can predict customer churn and identify new opportunities, helping you retain customers and grow market share.
- **Field Service:** Predictive maintenance and smart scheduling can optimize field service operations, reducing costs and improving service quality.



# Acumatica AI—a practical approach to solving problems

Acumatica's AI-first product strategy is designed to empower small and medium-sized businesses to thrive in today's competitive marketplace. By embedding AI at the core of the ERP solution, Acumatica delivers practical, responsible, and industry-specific AI capabilities that enhance human know-how and provide meaningful results. This approach ensures that AI is seamlessly integrated into your existing workflows, making it accessible and valuable without added complexity—delivering AI that works for you—that solves your operational problems and addresses your business challenges.

Shape your future and achieve new levels of productivity and efficiency by embracing the power of AI. Transform your business into a data-driven leader with an ERP platform designed to unlock AI's full potential. Lead the way in the intelligent business era.



Learn more, watch our on-demand webinar

**[Acumatica AI: Transforming ERP for the Intelligent Business Era](#)**

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.