Acumatica
The Cloud ERP

From QuickBooks to Acumatica

A Migration Guide for Metal Fabricators

Metal fabricators are under constant pressure to deliver precise quotes, manage changing material costs, keep production moving, and protect margins on every custom job. As your business grows, QuickBooks and separate applications may no longer match the way your teams work across estimating, CAD, inventory, production, purchasing, and financials. Manual workarounds and spreadsheet handoffs can slow decisions, create errors, and make it harder to see true job profitability before work is complete.

To move your business forward, you need a modern solution that connects each part of your operation, from quote creation and BOM management to shop floor activity, inventory, purchasing, and financial reporting. Acumatica brings fabrication, inventory, and accounting together in one cloud platform so your teams can work from the same real-time data.

Why Metal Fabricators Move Beyond QuickBooks

This guide empowers you to:

1. Identify the signs that your fabrication business has grown beyond basic accounting tools.
2. Tackle common estimating, material, production, change control, and margin challenges.
3. Discover why Acumatica is designed to connect the financial and operational needs of fabricated metal businesses.

> “Choosing Acumatica was like unlocking a new chapter for our business. I remember when we first implemented it—it was like pulling back a curtain to reveal insights we never knew we had. The intelligent workflows and usability have empowered us to better anticipate market trends and customer needs. We’re not just surviving; we’re thriving, and Acumatica’s community support plays a huge role in that. It’s truly a smart choice for any company looking to grow.”
>
> – Adrian Perkins, CEO, Venture Engineering

Is QuickBooks Holding Back Your Fabrication Business?

Fabricated metal manufacturers reach a point where basic accounting software and disconnected systems cannot keep up with the complexity of custom jobs, material tracking, and production decisions. If these pain points sound familiar, it may be time to consider a new approach.

QuickBooks Is Fine, Until It Is Not

- Complex fabrication work requires more than financial reporting, especially when estimates, BOMs, routings, production orders, and WIP must stay aligned.
- Managing material requirements, subassemblies, quote-to-production conversion, and make-to-order workflows is difficult with spreadsheets and disconnected tools.
- Month-end close takes longer when inventory, purchasing, production, and finance teams must reconcile separate data sets.

Insights Are Limited and Out of Sync

- There is no single real-time view of quote exposure, material availability, active jobs, machine capacity, job costs, and expected margins.
- Original quote assumptions can go stale when steel, aluminum, freight, tariff treatment, or outside processing costs change before material is purchased.
- Leaders often see true margin variance after the job closes, when it is too late to protect work already in motion.

Materials and Change Control Are Hard to Manage

- Tracking heat numbers, material grades, chemical compositions, lot attributes, scrap, and locations can become manual and error-prone.
- Customer revisions, drawing updates, BOM changes, routing changes, and outside processing can shift after quote approval.
- Without structured approvals, engineering changes can affect costs, inventory, schedules, and financial results without enough visibility.

Manual and Disconnected Processes Impact Productivity

- Rekeying quote details into orders, BOMs, purchase orders, and production jobs creates delays and avoidable mistakes.
- Purchasing teams may not know which jobs are affected when supplier pricing, lead times, or availability change.
- Shop floor teams lack timely visibility into material shortages, machine downtime, setup changes, and job status.

> “It is easy to review inventory history and keep track of stock at multiple locations and multiple warehouses. The behind-the-scenes process automations help keep things synced up throughout our business processes.”
>
> – Max McEwan, Operations Analyst
> MiiR

Why Leading Metal Fabricators Choose Acumatica

The modern fabrication business can no longer rely on disconnected tools and delayed reporting. Unifying your financials and operations within one platform empowers you to:

Deliver accurate quotes and finished parts

Connect estimating, BOMs, purchasing, production, inventory, and financials so your team can quote, build, and ship with confidence.

Protect margins with faster feedback

Track estimated versus actual costs, material variance, scrap, setup time, outside processing, and job profitability while work is still active.

Keep teams aligned on one source of truth

Give sales, engineering, purchasing, production, warehouse, and finance teams access to the same real-time data.

Scale with technology that matches your growth

Use a flexible cloud platform with unlimited user access, manufacturing depth, and connections to specialized design and production tools.



> “I love that Acumatica has allowed me to have live data to make great decisions and get great data to my great people.”

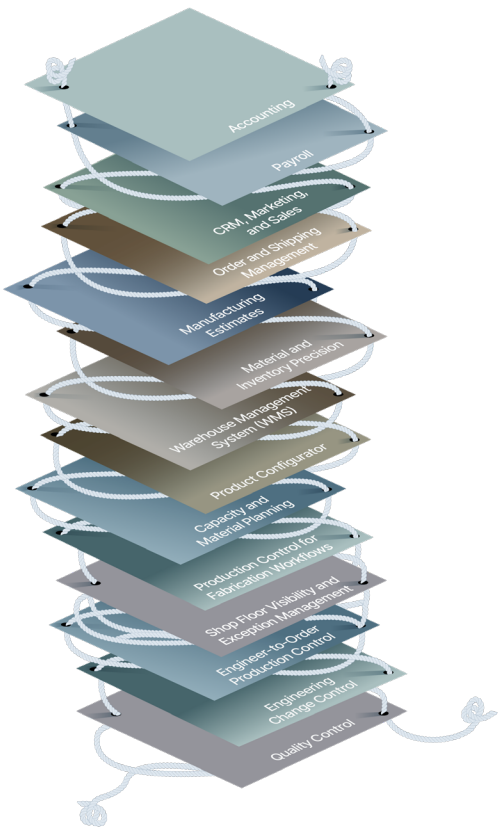
– Kirk Davis, Director of Operations
DiamondBack Truck Covers

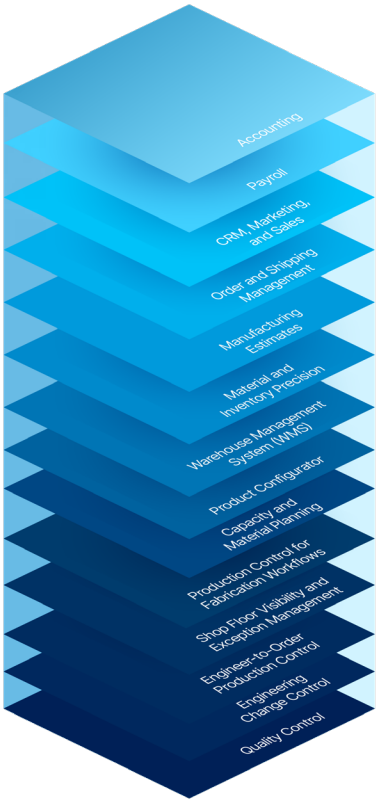
See the difference between managing QuickBooks and disconnected systems versus running your fabrication business on one connected platform.

QuickBooks
+ Other Solutions

vs

Acumatica
The Cloud ERP





> “Acumatica has been a game changer for us. We are able to see inventory live at multiple locations. Having that transparency has really helped with production. We are also able to forecast quicker and more accurately with the reports that are available.”

– Dawn Gildersleeve, General Manager Retail
Cherry Republic

Acumatica vs. QuickBooks

Metal Fabrication-Specific Capabilities

Discover the powerful features that help you tackle today's fabrication challenges and prepare your business for long-term success.



Production Control for Fabrication Workflows

Manage custom manufacturing and fabrication processes with tools for multi-level BOMs, subassemblies, routings, and job-based production. Whether you make-to-stock, make-to-order, or engineer-to-order, your team can orchestrate every step of the manufacturing process in one connected platform. Connect engineering and production with CAD connectors and PLM so customer-supplied product designs flow smoothly into estimating, quoting, and production, helping reduce manual entry, minimize rework, and keep teams aligned from concept through completion.



Engineer-to-Order Production Control

Convert complex, multi-quantity estimates into quotes and orders, then seamlessly turn them into BOMs and production orders without rekeying data. Maintain consistency between quoted and actual costs while actively managing machine setup times, scrap, and work-in-process across the entire job lifecycle, so every custom job stays accurate, controlled, and on track.



Product Configuration for Accurate Orders

Use a rules-based product configurator to guide teams through complex options and generate accurate, production-ready configurations. Standardize pricing, specifications, and routing logic while automatically creating multi-level BOMs for each unique order. Reduce manual effort, eliminate errors, and ensure every configured product moves directly into production with the right materials, structure, and steps in place.



Material and Inventory Precision

Track raw metals, vital components, scrap, and WIP with lot and location visibility across warehouses, shop floor staging areas, and production. Capture essential attributes such as heat numbers, chemical compositions, material grades, lot numbers, and serial numbers. Better material visibility helps buyers, planners, and production teams avoid stockouts, reduce excess inventory, and make decisions based on accurate quantities and costs.



Shop Floor Visibility and Exception Management

Monitor production activity, machine status, material shortages, unexpected delays, and active orders through role-based dashboards. Real-time insights help teams act quickly, solve problems, reduce downtime on expensive CNC and fabrication equipment, and keep custom jobs on schedule. Mobile data collection gives production and warehouse teams a faster way to record activity from the floor.



Capacity and Material Planning

Align purchasing and production schedules with actual demand using MRP, scheduling, and capacity planning. Plan around supplier lead times, inventory requirements, machine availability, setup time, and production constraints, including the need to source special materials or outside services for specific jobs. By coordinating material requests, vendor quotes, and purchasing commitments with sales orders and production needs, your team can improve throughput and reduce the risk of missed deadlines.

Revision and Engineering Change Control

Custom jobs change quickly. Manage updates to customer-supplied product designs, specifications, BOMs, and routings through structured change processes. Engineering change control helps define workflows for reviews and approvals, protects quality, and makes the cost, inventory, schedule, and financial impact of changes easier to understand before they affect margin.

Integrated Order, Inventory, and Financials

Connect sales orders, fabrication workflows, inventory movements, purchasing, production, and financial accounting in one centralized system. Leave manual spreadsheet reconciliations behind, speed up month-end close, and gain a clearer view of true job costs. Embedded CRM, document management, dashboards, and AI-driven insights further help teams automate workflows and respond faster when risk appears.

Summary

Industry-leading metal fabricators recognize that growth demands more than basic accounting. Disconnected systems, manual processes, and limited visibility make it harder to create accurate quotes, control production, track material changes, and protect margins. Acumatica Manufacturing Edition is designed for the way fabricated metal manufacturers work, connecting estimating, engineering, inventory, production, purchasing, and financials in one cloud platform.

With Acumatica, you gain real-time visibility into materials, BOMs, routings, WIP, job costs, change orders, and margins. Your teams can reduce duplicate data entry, automate approvals, respond quickly to supplier and customer changes, and make decisions from one shared view of the business.

It is time to move beyond disconnected QuickBooks workflows and unify your fabrication operations. **Learn more about Acumatica** or **schedule a personalized demo** to see how a connected platform can help you improve productivity, protect profitability, and build a foundation that matches your growth.

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.