Acumatica
The Cloud ERP

IT'S ALL ABOUT DESIGN

Acumatica's combination of technology and functionality for high usability

We've all bought software based on demonstrations by skilled presenters, but when we try to use the functionality, we often become frustrated.

Why can't the product that best meets our needs be easy to learn and use?

We buy these systems for many reasons, but easy, secure use by management, staff, customers and suppliers is a primary need.

When systems are inconvenient or difficult to use, they will never reach their full potential.

In this whitepaper, Acumatica will provide great examples of usability features. They are flexible while meeting the key requirements for each major department such as sales, distribution, accounting and field service. Also, they meet the needs of companies in wholesale, manufacturing, retail, eCommerce and project management.

This enables users to change a system to be more relevant and productive for the way they do their job, and it enables your company to make the most of its investment.
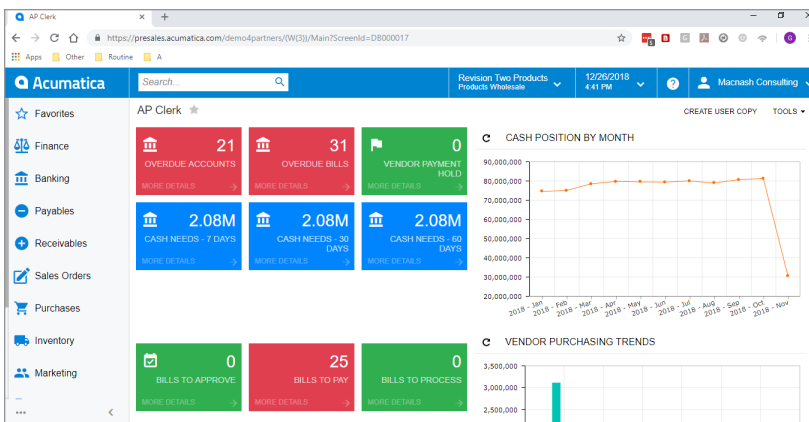
HIGHLIGHTS

- Choose the best devices for your business

- Optimize how the information you need is shown

- Use powerful tools to find what you need

- Automate Acumatica to supply your data

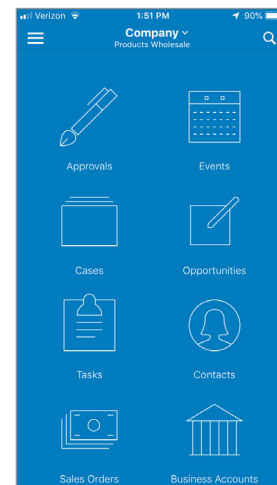- Capitalize on features unique to mobile technology

Choose the best devices for your business

Acumatica is a True Cloud solution with a look-and-feel that is built with modern tools that allow it to run on any device, anywhere. Responsive design adapts to your device and screen size, automatically re-sizing the information and functionality you need to fit the device.
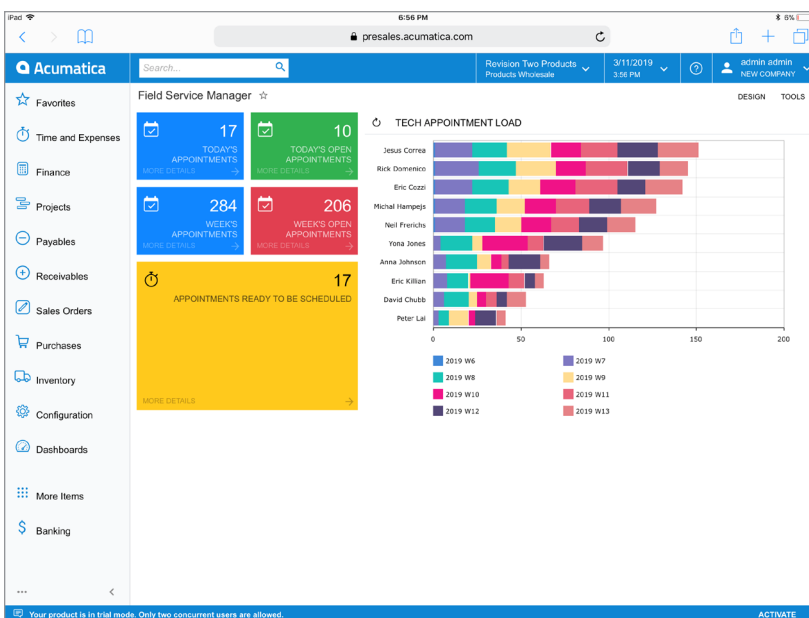
It is easy to navigate across your complete business, and the screens and reports are easy to read. It supports multiple browser tabs, so you can keep Acumatica open to the areas you routinely need. It provides contextual help throughout the system, giving you the answers you need. Plus, it supports HTLM industry standards.

Acumatica on your computer

The mobile application provides ERP functionality that is easy to use on phones and tablets, and it takes advantage of features like a camera to snap pictures of expense receipts.
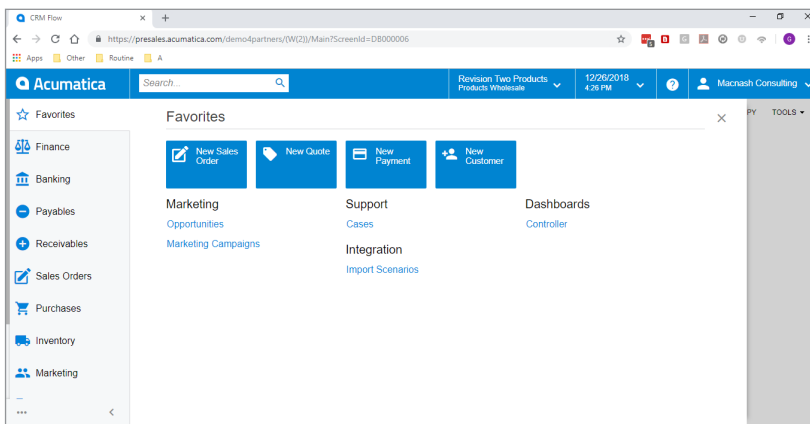

The complete Acumatica solution available on your tablet

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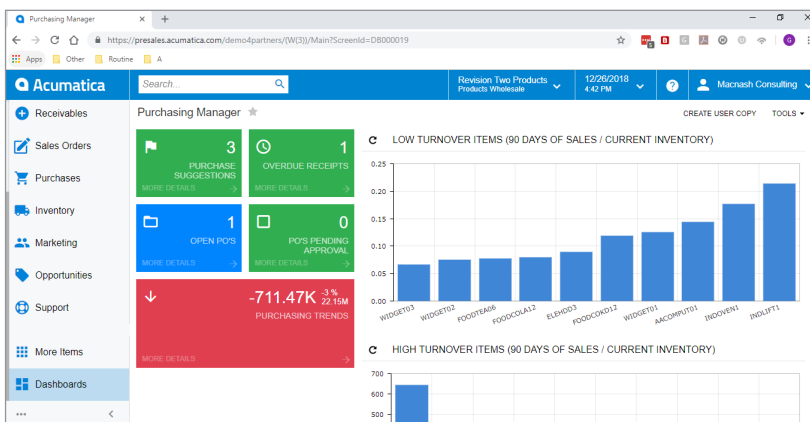
Optimize how the information you need is shown

Create your Favorites Page

Organize the way you want, including a list of dashboards, applications, functions and screens. The Favorites Page can be changed by the user at any time (no need to call IT). It is a convenient place to access all the areas in Acumatica during the working day.

Set up Dashboards

Provide immediate access to critical information. Each user can have as many dashboards as they need – one for each area of the system they access or each task or duty they perform. Dashboards are designed by administrators or users through intuitive, straightforward design tools.

The Purchasing Manager's Dashboard tracks the important metrics for daily operations.

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Data Displays

Every system comes with standard, pre-formatted data displays that users may want to tailor to their own preferences and needs. With Acumatica, changing the format, content, sequence and summaries is a simple as moving things around on the screen and then saving the new definition for convenient reuse. Plus, you can highlight results in color based on business rules.

When reviewing a long list of documents such as invoices, put the important information at the start and hide columns you don't need.

Look Ahead Typing

As you start typing in any field, Acumatica "looks ahead" to identify available options. This saves time when searching for information, and it's easy to configure to fit each individual's needs.
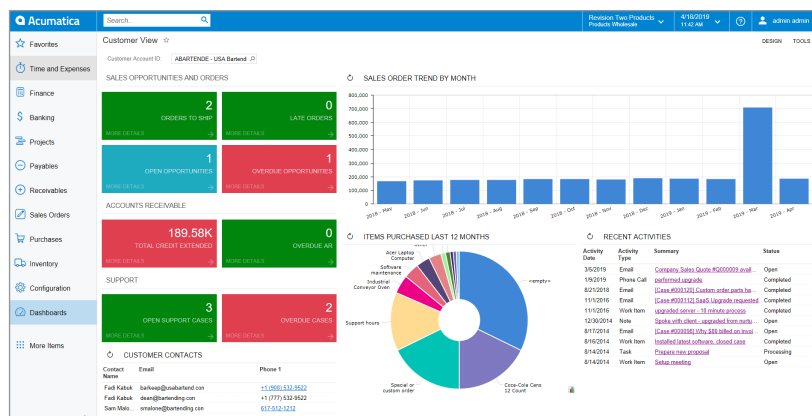

Just start typing into a field to see the available options listed. In this example, identify the credit terms for your customer.

Use powerful tools to find what you need

Drill-down for details

Dashboards are usually focused on "big picture" summaries that track Key Performance Indicators (KPIs) for each area of the business. With Acumatica, the user can click on a Dashboard indicator to access the next level of detail…right down to the source entry, document or transaction. This includes built-in, drag and drop document management.

Management can start from a tablet dashboard and drill into real-time information across the business.
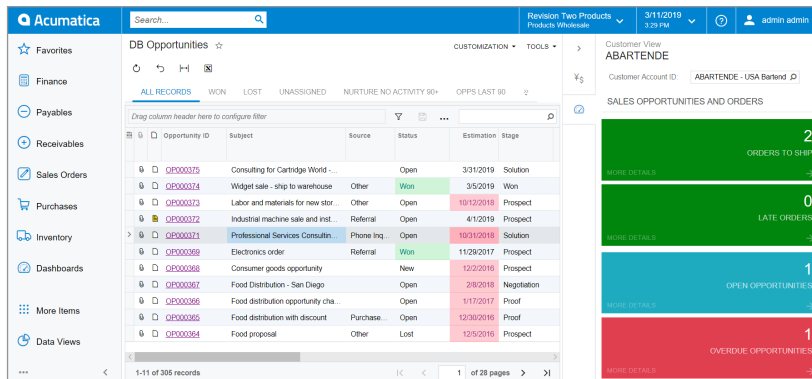
Global Search

Global Search is a fast, simple tool for finding whatever you need in Acumatica. For example, you can start by entering "ABC" in the Global Search field. As you type, all relevant menu items, transactions, help articles and files are immediately listed. Artificial Intelligence (AI) and Machine Learning (ML) enable the Global Search function to prioritize and summarize help results.
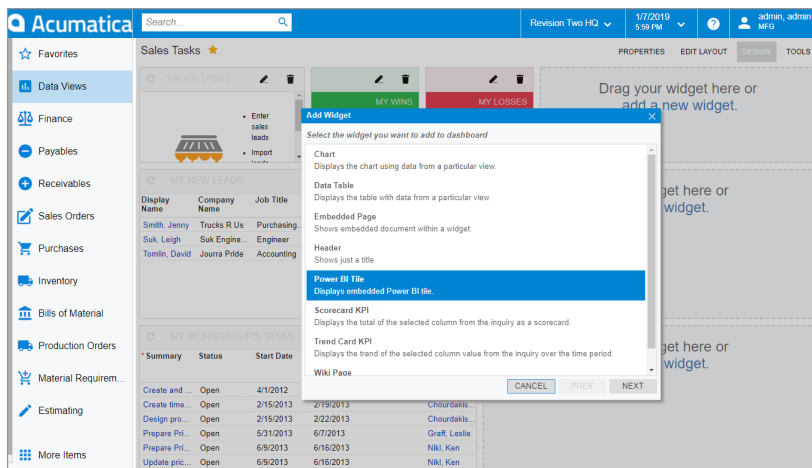
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Generic inquiries

Generic Inquiries provide powerful, fast data access for those one-time questions and explorations. Complete with filters and pivot table functionality, Plus, an expandable side panel displays record details for review or editing, as well as dashboards with graphs and charts.

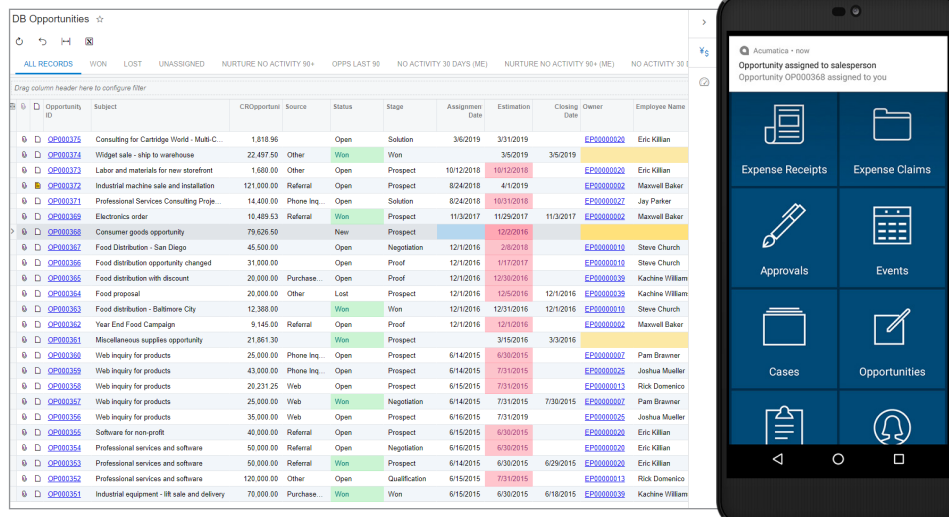## Microsoft Power BI (Business Intelligence)

Acumatica, built on the Microsoft ecosystem, is fully compatible with the Microsoft Power BI toolset that can access and display data from multiple systems on one dashboard. Prepare, model, analyze, publish and share information from Acumatica and other applications.
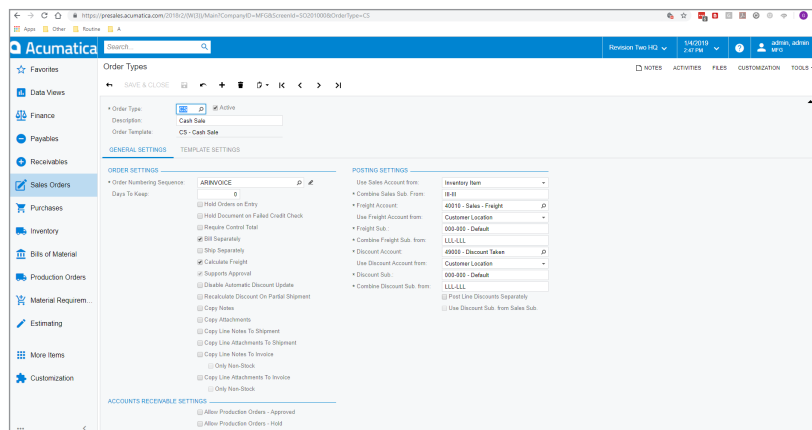
Automate Acumatica to supply your data

Add notifications and alerts

Keep your team up to date with notifications. Monitor data changes and send email or mobile notifications when a critical event occurs. For example, notify a sales representative when they are assigned a new sales opportunity. Create daily, weekly, or custom schedules to send reminders.
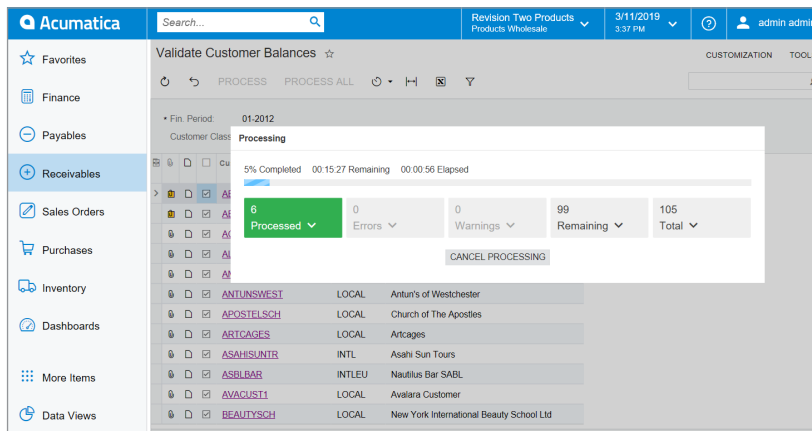

Monitor processes

Building on notifications and alerts above, Acumatica can continually and automatically track activities and conditions in the system. For example, automatically approve sales orders based on matching open quotes and the customer credit limit. Or, send a push notification by phone to a sales manager when an unexpected order is received.
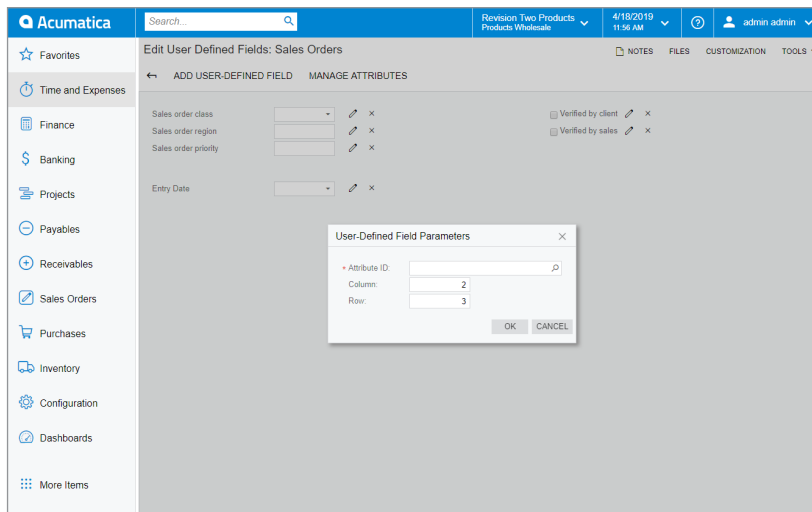
Change Workflows

Change the stages and sequence of any process to meet your business needs. Workflows can be single and multi-level, as well as hierarchical. Also, you can track lengthy, background processes with a status bar.

Add data fields

Add fields to Acumatica, incorporating them into work flows, security and business rules without programming. Access them from Dashboards and reports.
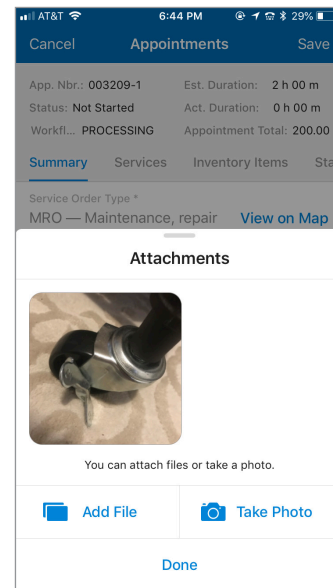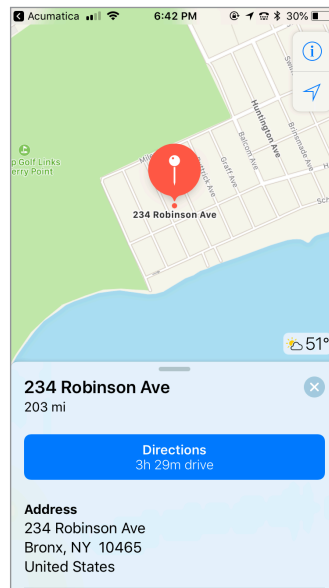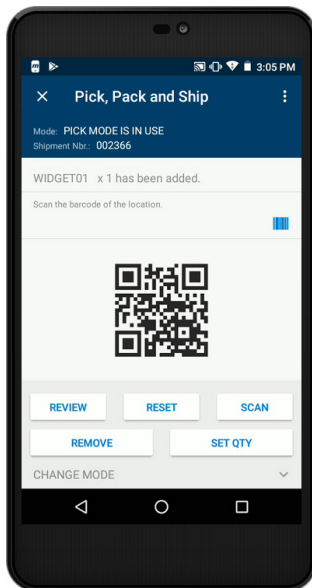
Capitalize on features unique to mobile technology

Not only are screens and functions automatically re-sized and formatted specifically for smaller screens, special phone applications are tailored to the layout and capabilities of IOS and Android operating systems.

Use on-the-go workflow such as creating and approving expense reports while in the field. Mobile apps take full advantage of phone and tablet capabilities including:

- Read barcodes to access product and service information
- Track location via GPS and maps
- Add photo documentation to reports and messages
- Display calendars by personnel and time ranges
- Dictate updates with speech recognition

See it for yourself in a demo personalized for your business needs.

Acumatica would love to help you find the right Cloud ERP solution for your business. Contact us for a custom demo at acumatica.com/request-a-demo.

About Acumatica

With more than 5,200 customers, Acumatica is trusted by companies across many different industries. Acumatica ERP delivers adaptable cloud and mobile technology with a unique, all-inclusive user licensing model. Acumatica provides a complete real-time view of your business anytime, anywhere, on any device.

Through our worldwide network of partners, Acumatica ERP provides a full suite of integrated business management applications, including Financials, Distribution, Project Accounting, and CRM, as well as separate Field Service, Commerce, Manufacturing, and Construction Editions. Learn more at acumatica.com/industries.