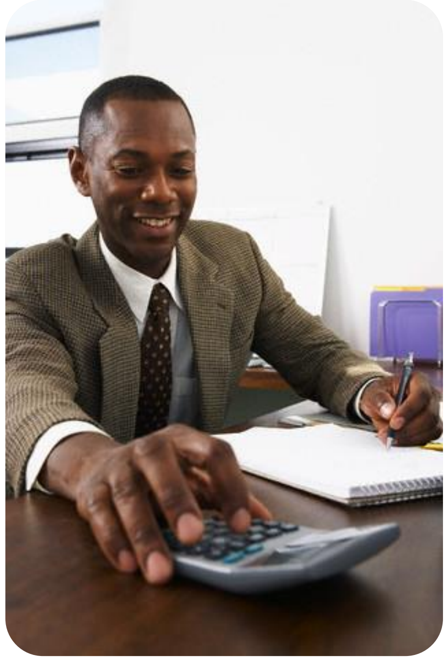


K2's Choosing Your Mid-Market Accounting Solution

Learning Objectives

US Dollar 1USD 32.8876
Euro 1EUR 42.9841
COMPLETED
RECURRING
PENDING
ACCOUNTING
372
240
485

Upon completing this session, you should be able to:

- List the top five products in the mid-market
- Identify standard third-party solutions needed
- Differentiate between a nice-to-have upgrade and a genuine business need
- Create an implementation plan for your business

Today's Agenda

- Market
- Industry solutions
- Vertizontal solutions
- Examples of products
- Selection Process

Current Mid-Market Technology

SaaS	Hosted
Acumatica	Deltek
Dynamics 365	ECI Macola
Exact	Epicor
NetSuite	Infor
Sage Intacct	Open Systems TRAVERSE
SAP Business ByDesign	SYSPRO
Sage Business Cloud X3	

Technology Choices

Third-Party Add-ons

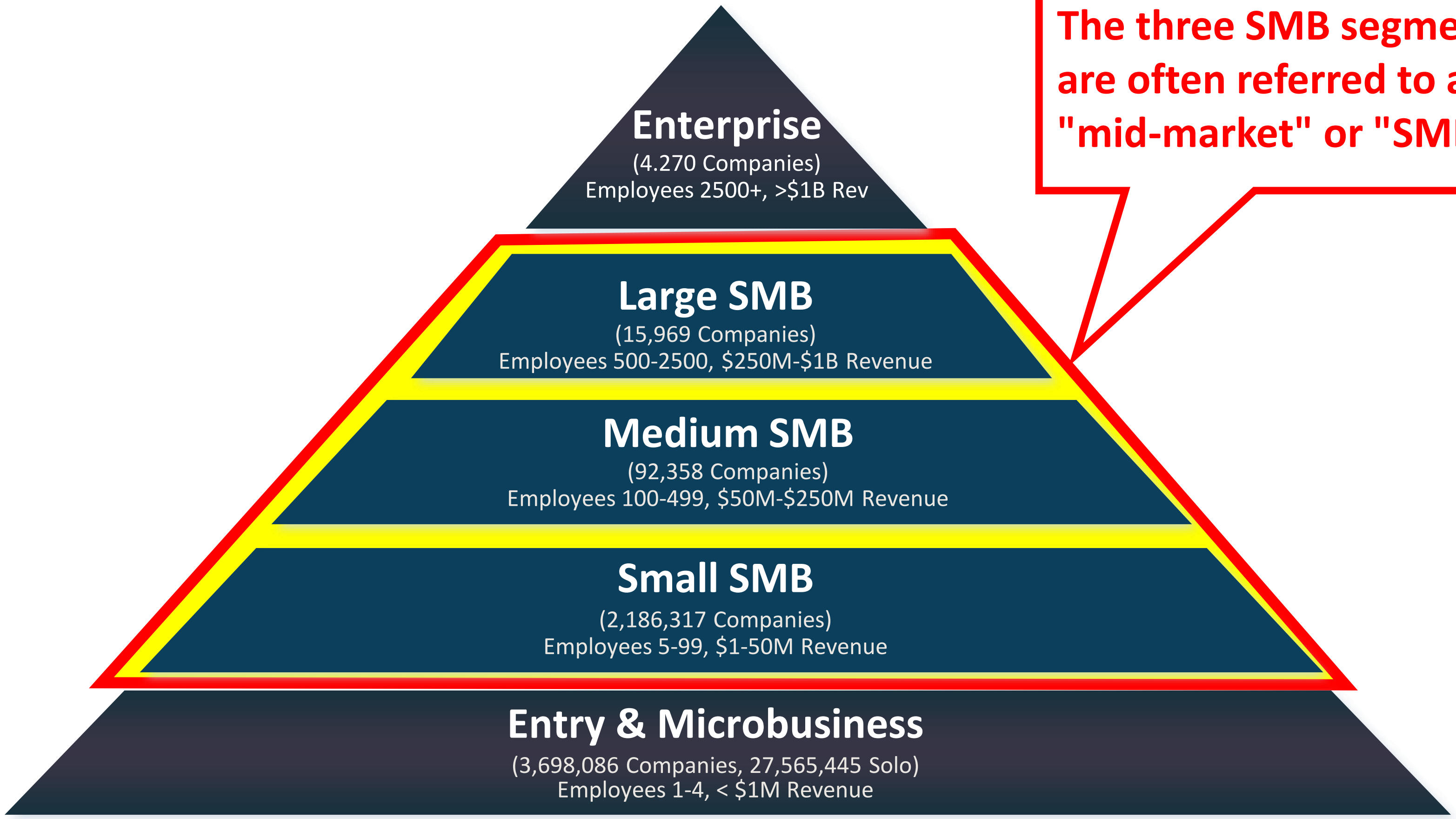
- Sales and Use Tax
- Third-party reporting
- Rapid close
- Integration of any system not included (one throat to choke)
  - Payroll/HR
  - Fixed Assets
  - AP approval
  - Credit card/bank integration
  - CRM, if not included

Future Proofing

- Growth expected in 5-7 years
- Setting up workflows correctly (separate session on this)
- Set expectations of review and selection in about ten years
- Ask for road maps recently completed and for the future

MARKET OVERVIEW

Market Segmentation



Enterprise
(4.270 Companies)
Employees 2500+, >$1B Rev

Large SMB
(15,969 Companies)
Employees 500-2500, $250M-$1B Revenue

Medium SMB
(92,358 Companies)
Employees 100-499, $50M-$250M Revenue

Small SMB
(2,186,317 Companies)
Employees 5-99, $1-50M Revenue

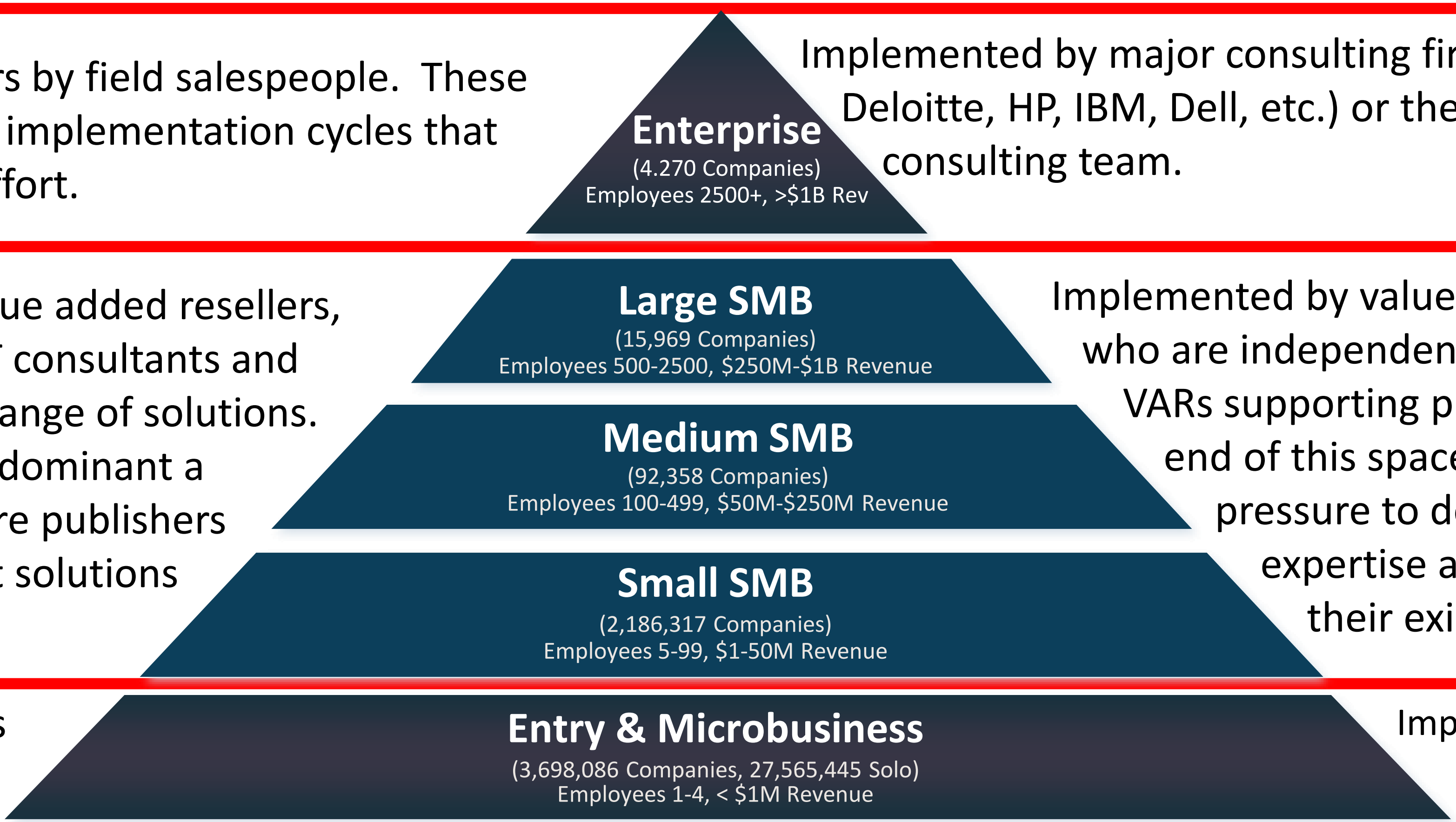
Entry & Microbusiness
(3,698,086 Companies, 27,565,445 Solo)
Employees 1-4, < $1M Revenue

The three SMB segments are often referred to as "mid-market" or "SMB"

Market Segmentation

How are solutions in each segment sold to customers?

How are solutions in each segment implemented?



Sold directly to end-users by field salespeople. These products have sales and implementation cycles that require many years of effort.

Enterprise
(4.270 Companies)
Employees 2500+, >$1B Rev

Implemented by major consulting firms (Accenture, Deloitte, HP, IBM, Dell, etc.) or the publisher's internal consulting team.

Sold to end-users by value added resellers, who are independent IT consultants and usually provide a wide range of solutions. The reseller model was dominant a generation ago, but more publishers now sell and implement solutions with their own staff

Large SMB
(15,969 Companies)
Employees 500-2500, $250M-$1B Revenue

Medium SMB
(92,358 Companies)
Employees 100-499, $50M-$250M Revenue

Small SMB
(2,186,317 Companies)
Employees 5-99, $1-50M Revenue

Implemented by value added resellers, who are independent IT consultants. VARs supporting products in the upper end of this space are under increasing pressure to develop industry expertise and solutions to justify their existence to publishers

Sold directly to end-users by telephone or online

Entry & Microbusiness
(3,698,086 Companies, 27,565,445 Solo)
Employees 1-4, < $1M Revenue

Implemented by bookkeepers, end users, or consultants

Solutions By Segment

SaaS or CLOUD SOLUTIONS

Hosted or ON-PREMISES SOLUTIONS

Enterprise
(4.270 Companies)
Employees 2500+, >$1B Rev

Large SMB
(15,969 Companies)
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Entry & Microbusiness
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Employees 1-4, < $1M Revenue

workday.
infor
EPICOR
ORACLE NetSuite
SAP
exact
priority
Acumatica
FINANCIALFORCE
GRAVITY SOFTWARE
ZOHO
CORE
qb
xero
kashoo

sage
Business Cloud X3,
Intacct,
300cloud,
50cloud, Business
Cloud Accounting

Microsoft Dynamics 365
D365 For Financials
D365 Business Central

SAP
ORACLE
infor
EPICOR
Deltek.
SYSPRO
Acumatica
SAS
eci Macola
CYMA
eci JobBOSS
qb
priority

sage
Business Cloud X3,
300, 100, 50

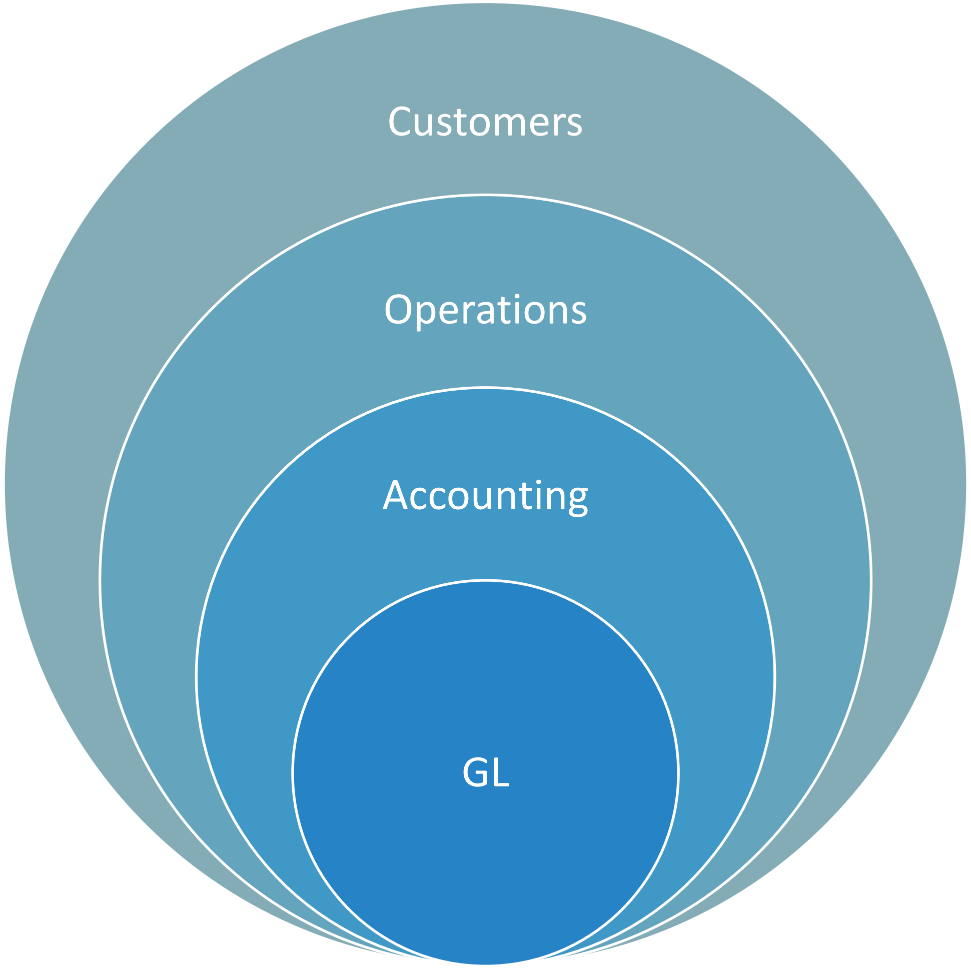
Microsoft Dynamics 365
AX, NAV, GP, SL,
CRM

wave
FINSYNC
FRESHBOOKS cloud accounting
intuit QuickBooks Self-Employed
intuit mint

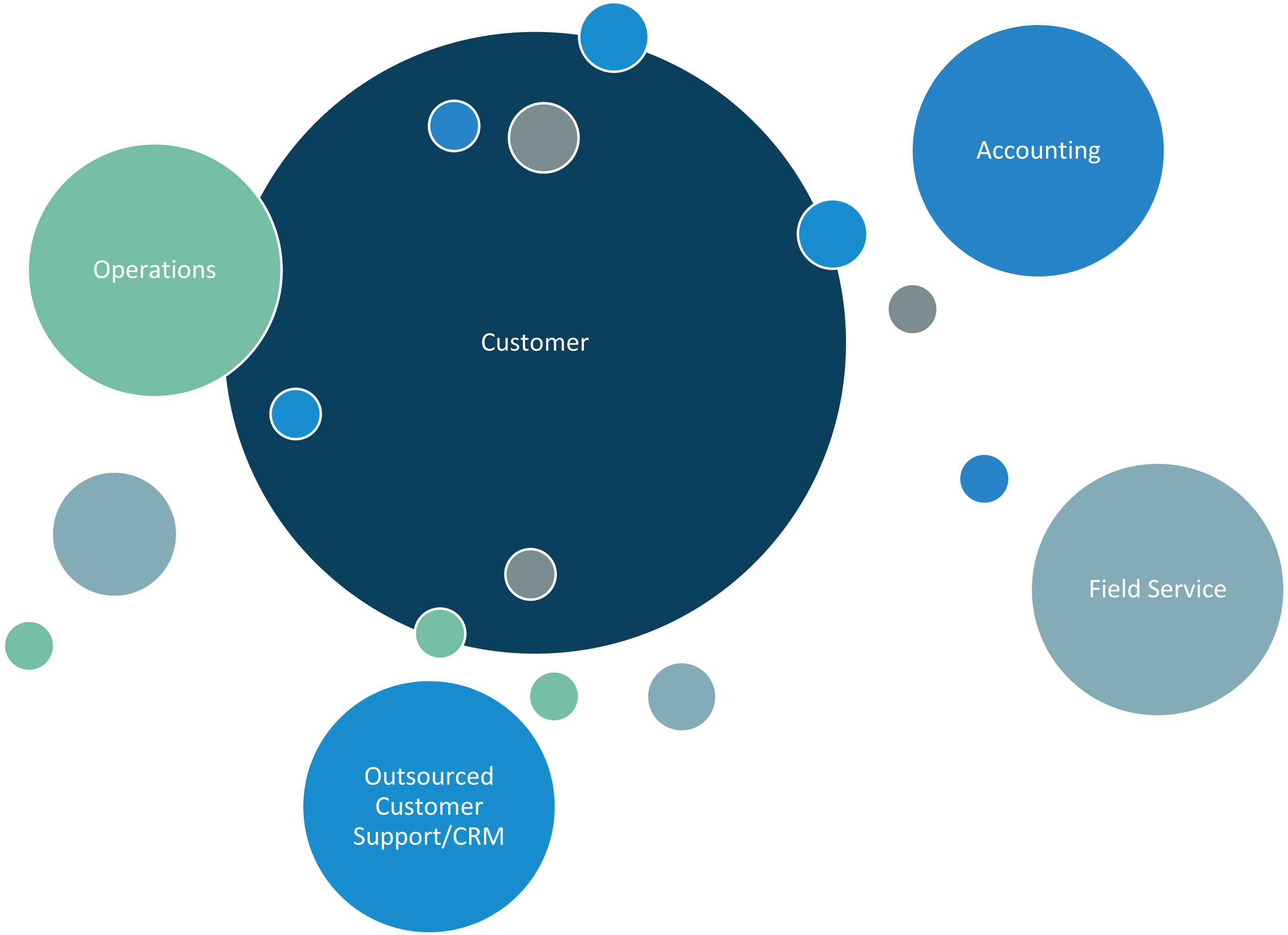
Mainstream – Smaller To Larger

- Open Systems
- Sage Intacct
- Acumatica
- NetSuite
- Microsoft Dynamics 365
- Exact Globe with eSynergy
- Sage Business Cloud X3
- Workday

Integration = Better Service


Customers
Operations
Accounting
GL

Info Islands = Poor Service


Operations
Customer
Accounting
Field Service
Outsourced Customer Support/CRM

Current System Cobbled Together?

- Systems that don't connect electronically
- Systems purchased separately or over a period
- Systems controlled by various business departments or IT
- Legacy system written with custom code
- Modifications made to systems that can't be updated easily

Business Process Workflows

- Operations are more important than financials because life is out the windshield instead of the rearview mirror
  - CRM
  - Sales Tax
  - Dashboards/KPI
- Accounting needs automation, too
  - Robotic Process Automaton (RPA)
  - Rapid close
  - Bank interfaces
  - Financial Statements/Board Reporting

INDUSTRY SOLUTIONS

Tier 1 Systems Are Comprehensive

- ERP systems are complex to implement properly
- Oracle and SAP have vertical integration = manufacturing, distribution, field service
- Supply chain, business analytics and other features available
- Not all larger systems are comprehensive
    - Workday is a less comprehensive example

Tier 2 Systems Are Not As Complete

- ERP systems are still comprehensive in Tier 2
- Epicor, and Infor have vertical integration = manufacturing, distribution, field service but generally not as robust as Tier 1
- Supply chain, business analytics and other features generally come from third-parties

Manufacturing

- Acumatica
- Dynamics 365
- Epicor
- Infor
- SYSPRO

Distribution

- Acumatica
- Epicor
- Exact
- Infor
- NetSuite
- Open Systems TRAVERSE
- SYSPRO

NFP

- Abila
- Blackbaud
- Gravity Software
- Open Systems TRAVERSE
- Sage Intacct
- Serenic

Construction/Job Costing

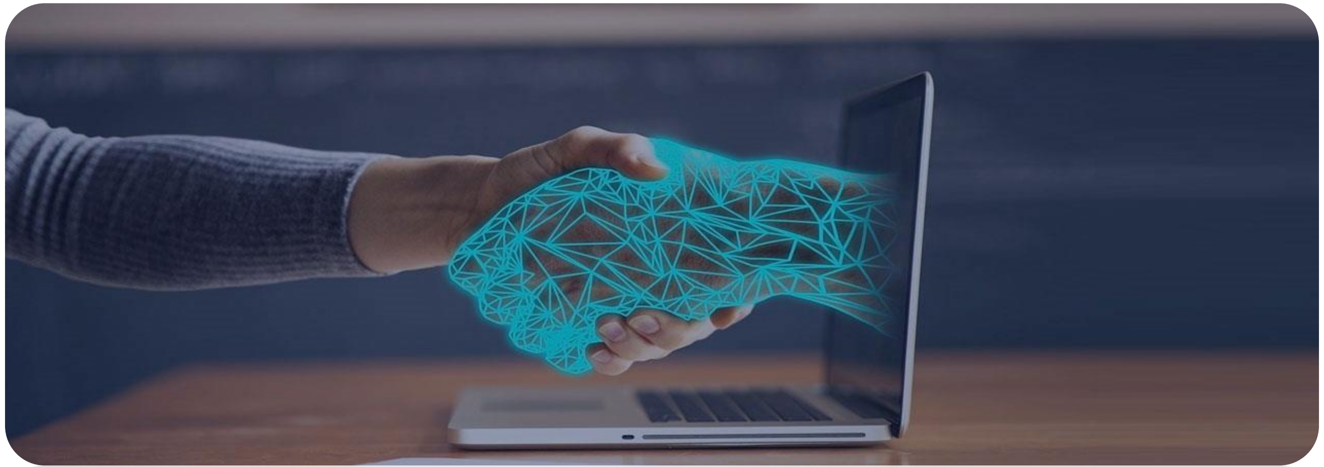
- Acumatica
- Sage 100 Contractor
- Sage 300 Construction & Real Estate
- Spectrum

Vertical/Field Service/POS

- Acumatica
- FieldEdge
- Open Systems

Applications For Specific Functions

VERTIZONTAL SOLUTIONS



To Accomplish These Various Tasks Effectively

FREQUENTLY NEED THIRD-PARTY

Accounts Payable

- AvidXchange
- Bill.com
- Checkbook.IO
- Corpay One

Sales Tax

- Avalara
- Sovos (was ADP Taxware)
- Thomson ONESOURCE (was Sabrix)
- Vertex (Jack Henry)

Dashboards

- Power BI
- Qlik
- Tableau

Reporting

- MicroStrategy
- Paris Technologies
- WebFocus

Budgeting And Forecasting

- Adaptive Insights (caution…Workday)
- Alight Planning
- Planful
- Planning Maestro
- Prophix

Rapid Close

- Blackline
- FloQast
- Trintech Adra Suite

Less Well-Built Functions

- Payments
- Point of Sale
- CRM
- Payroll
- HR/benefits administration

WRONG CHOICE
RIGHT CHOICE

Considerations And Questions

SELECTION PROCESS

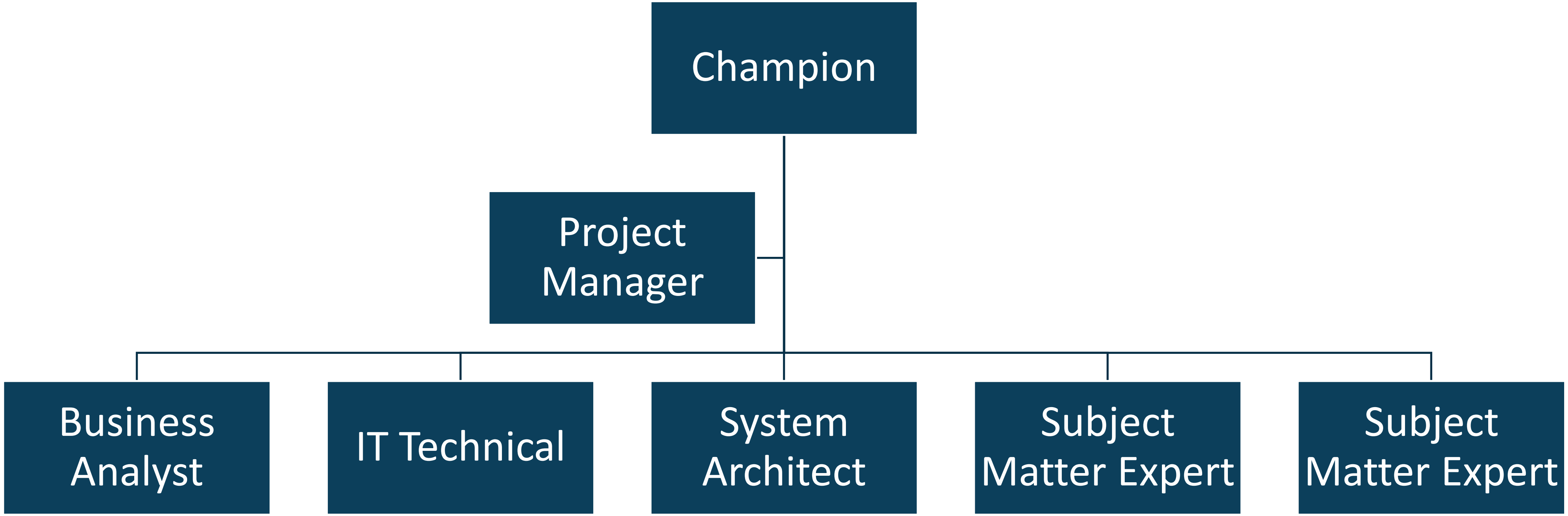
Setting Expectations

- Some problems won't be solved
- Things will work differently in the new system
- Extra effort on selection and training will be needed
- Diligence on testing, conversion and integrations minimizes issues
- Demonstrations frequently don't portray reality
- Contracts require careful review
- Project management is mandatory

Overview Of Selection Process

- Create project team
- Map processes
- Assemble requirements documents for RFQ/RFP
- Manage RFQ responses and contract for system
- Create implementation plan

Typical Project Team



Champion

Project Manager

Business Analyst

IT Technical

System Architect

Subject Matter Expert

Subject Matter Expert

Selection Process

- Establish a Technology Advisory Group (TAG)
- Prepare your Needs Analysis
- Talk with your current vendor
- Define your budget and projected milestones
- Consider an independent consultant (there are few)
- Become Knowledgeable (including process mapping)
- Prepare a formal Request for Proposal (RFP) or Quote (RFQ)
- Demonstrations of product solutions
- Prototype testing
- Legal Considerations
- VAR or Vendor Due Diligence
- Contact and/or visit references

Selection Decision

- Business needs are still paramount
- Create lists:
  - 10-15 features desired
  - Five to seven things not to lose
  - Initial budget and timeline
- Requirements definition and an RFQ/RFP process still needed
- Project management skills paramount to success
- Workflow process mapping ***should be done in advance***

What Should We Avoid?

- Going immediately to vendors
- Working with a supplier just because they are local
- Only choosing big brand names because they are "safe"
    - Does anyone get fired for buying IBM/Microsoft/SAP?
- Doing what "everyone else" is doing – because the best way to make a bad decision is to follow the herd without diligence
- Not developing your own numbers and budget
- Avoid cloud solutions where exit costs are not understood

Risks

System

- Change from your existing platform
- Not understanding the interfaces and capabilities of your current system
- Integration into third-party products
- Underestimating the switching costs and time
- Not understanding the impact of new systems on your operational processes and the related internal controls
- Trying to do it on the "cheap"

People

- Organizational politics
- Management buy-in
- Retraining in the organization
- Employee buy-in for tools or processes
- Trying to move too fast or slow
- Not having the right people involved

General Installer Qualifying

- What is your experience in my vertical industry?
- How many other clients do you have of similar size?
- Why do you want our business?
- How do you expect to retain us as a client for the next 10 years?
- What does our engagement with your organization look like after the implementation is completed? Who provides support?
- How many third-party products are you certified to work with, and where can I learn more about those add-ons?
- Describe your implementation methodology

Installer Qualifying

VAR/Partner

- How do you keep current?
- How deep is your support team?
- How long in the business?
- How many implementations have you done for this product?
- How many implementations in your vertical industry?
- Do you have a succession plan?
- What are your support hours?

Direct

- Who is assigned?
- Where are the consultants located?
- How many implementations in your vertical industry overall?
  - How many for your assigned team?
- What is the expected scope of the implementation engagement?
- How do you handle overruns?
- How do we resolve issues?
- Where are your support offices?

Product Fit Assessment

- Why is your product the best fit for our organization/industry?
- How can we be assured that your product fits our needs?
- How do you map to our requirements definitions?
- Who was your product originally designed to serve?
- How long has your software supported your industry?
- What are your target vertical markets?
- Do you have a wheel of your ecosystem and third-parties?
- Do you expect that our implementation will require custom code?

Approach Questions

Premise/Hosted

- Scalability?
- Cost of ownership OK?
  - Initial
  - On-going maintenance
  - Upgrades
  - Other licenses (databases, BI, etc.)
  - Internal or contracted IT costs
- Integrations

SaaS/Cloud

- Solves problem?
- Ability to export data in future and cost for obtaining exported data?
- Escrow capability?
- Data center redundancy?
- Connections to other systems?

RFQ Requirements Documents

- Background on organization
- Product requirements
- Introduction
- Technology profile
- Module checklist
- Create demonstration agenda with timeline
- Differentiators
- Ability-to-execute
- Preliminary solutions cost worksheet
- Create a list of demonstration scenarios

RFQ Responses And Contracting

- Phone briefing/virtual meeting
- On-site visits
- Written questions and responses
- Short demonstrations
- RFQ/RFP documents review
- Long demonstrations
- Notify candidates of contract award

Create Implementation Plan

- Break project up into phases
- Create implementation schedule
- Configure system
- Convert data for testing
- Train users
- Test system and dry run
- Go live
- Debrief
- Plan for next phases

Summary

- SaaS products are coming of age and functionality improving
- Completeness/robustness is still less than legacy products
- Price per seat is escalating, expect $200-300/user/month plus additional third-party solution costs

BEST OF LUCK!

PRODUCTS APPENDIX

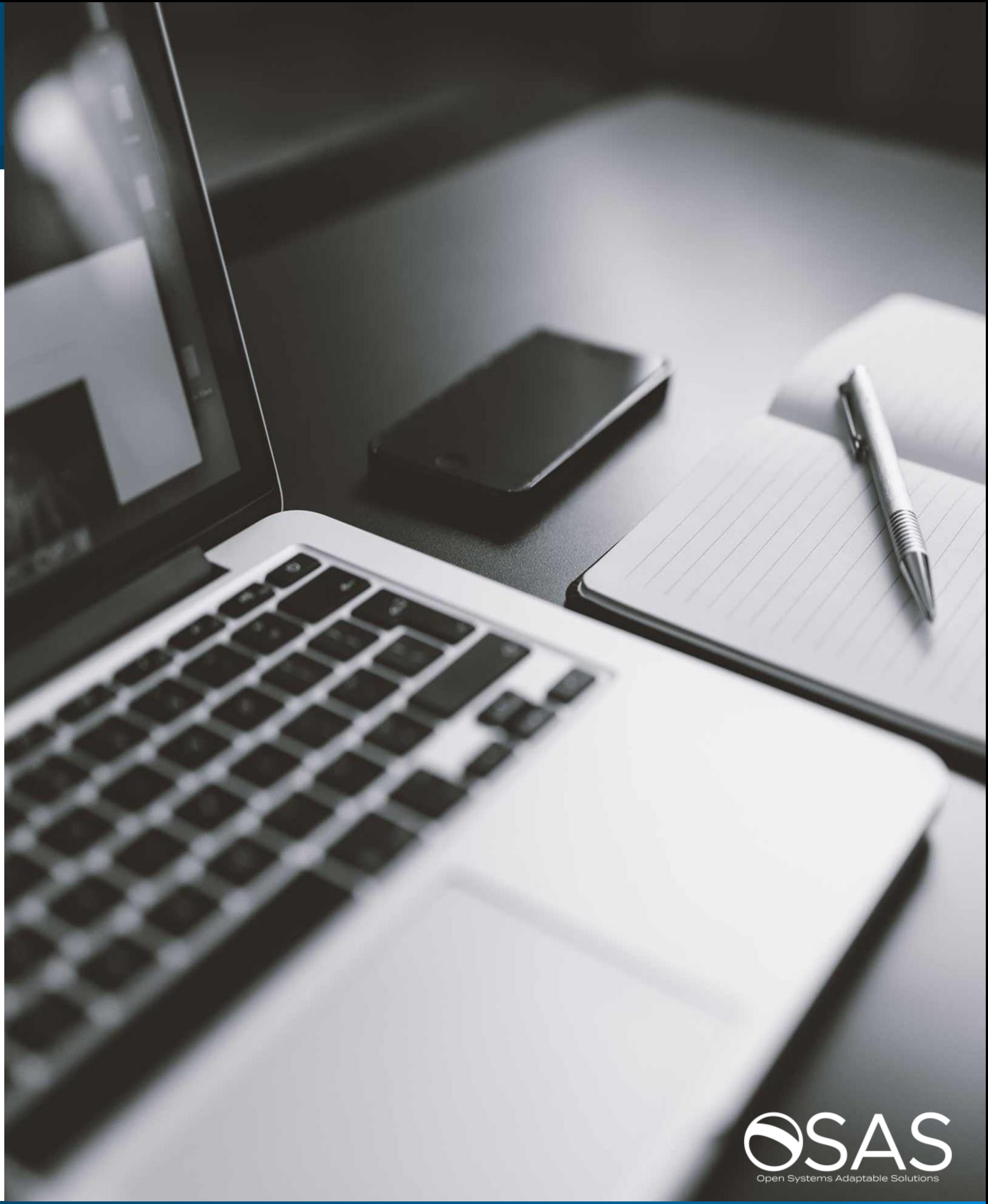
Powered by OSAS

Traverse
Master

OSAS
Open Systems Adaptable Solutions

TRAVERSE Capabilities

- Real-time Access to all Company Functions
- Improve Efficiencies in the Sales Processing Area
- Real-time Reporting / Dashboards
- MRP for Procurement and Production Planning
- Bar-code Scanning for Improved Accuracy for Inventory
- Eliminate Manually Generated Paperwork



OSAS
Open Systems Adaptable Solutions

Company Information

Open Systems Adaptable Solutions

Industry Breakdown

Distribution / Wholesale Trade: Durable and Non-Durable Goods

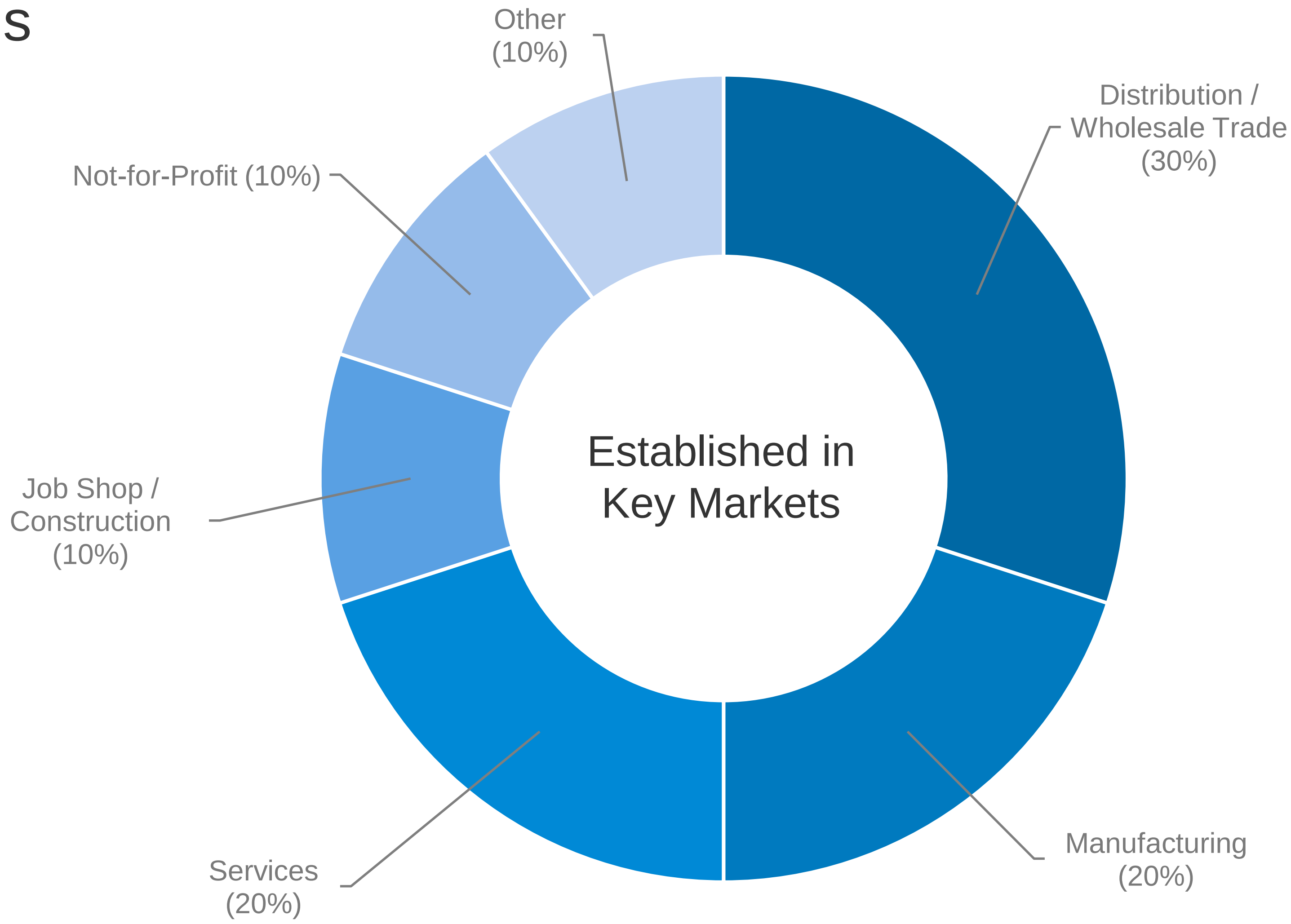
Manufacturing: Discrete and Process

Services: Food Equipment, HVAC, Plumbing, Electrical, Dispatching, Installation and Field Service

Job Shop / Construction: Commercial and Residential Contractor

Not-for-Profit: Heath and Human Services

Other: Retail, Agriculture, Transportation, Public Utilities, Insurance and Financial Services



Company Information

40+
Years in Business

300+
Employees

10
Office Locations

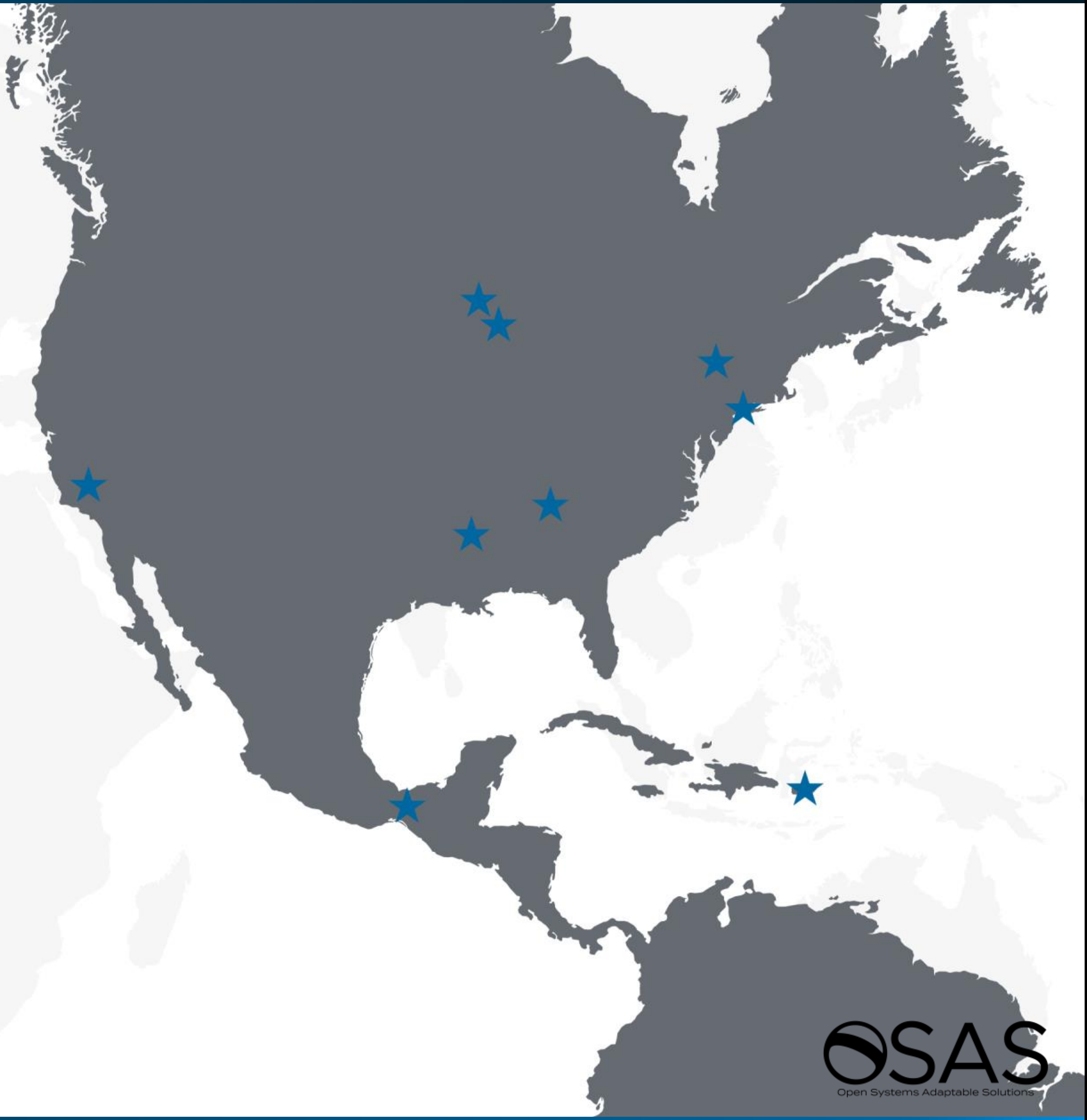
10,000+
Customers

HEADQUARTERS
Minneapolis, Minnesota

REGIONAL OFFICES
Los Angeles, California
New York, New York
Waterville, New York
St. Cloud, Minnesota
Greenville, South Carolina
Auburn, Alabama
San Juan, Puerto Rico

INTERNATIONAL OFFICES
Costa Rica, India

INTERNATIONAL PRESENCE
Mexico, Panama, Australia,
Saudi Arabia, Lebanon,
Canada, Argentina,
Dominican Republic



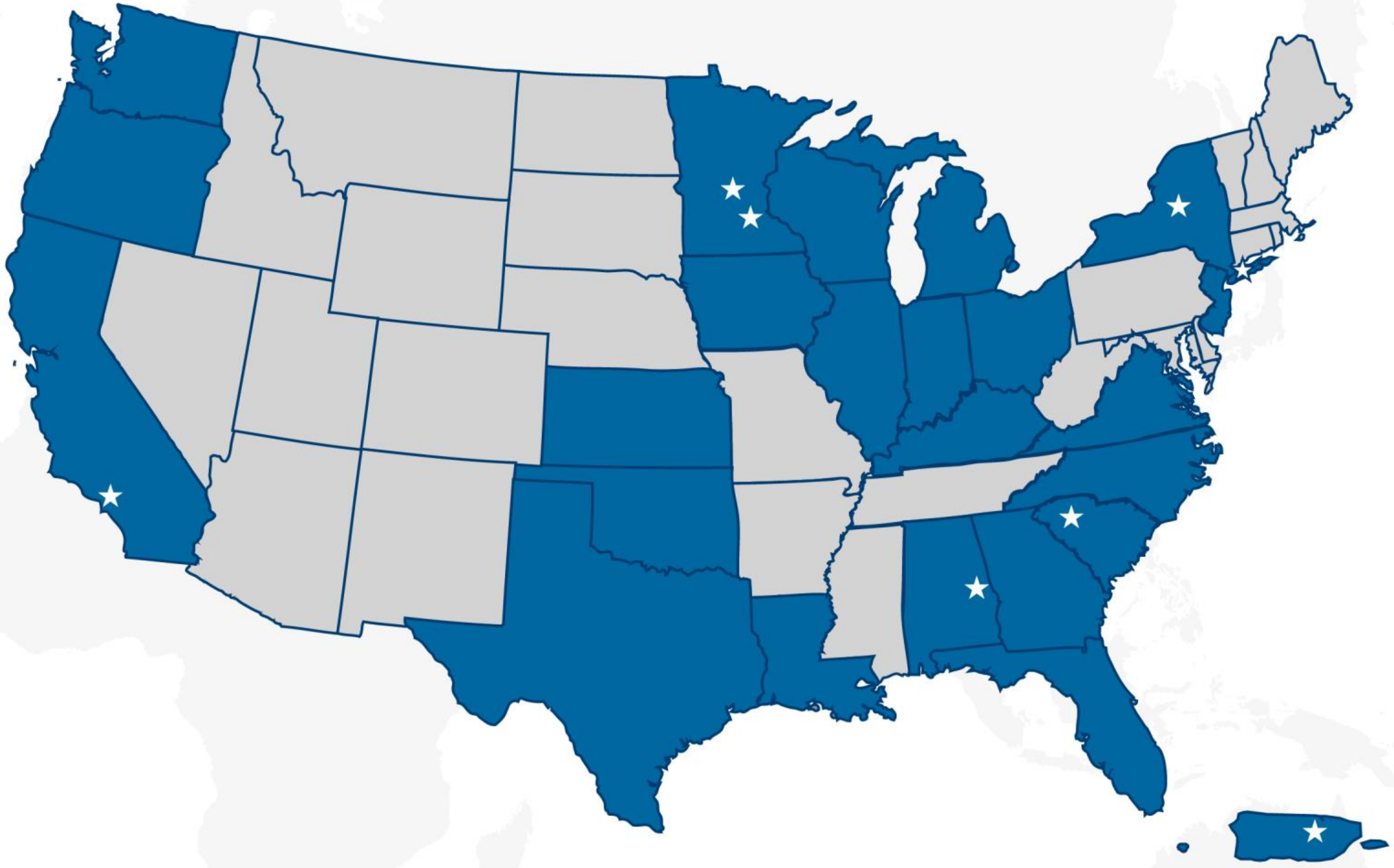
OSAS
Open Systems Adaptable Solutions

Company Information

National Presence

Florida
Georgia
Illinois
Indiana
Iowa
Kansas
Kentucky
Louisiana
Michigan
New Jersey

North Carolina
Ohio
Oklahoma
Oregon
Puerto Rico
Tennessee
Texas
Virginia
Washington
Wisconsin



☆ Denotes office location

OSAS
Open Systems Adaptable Solutions

Traverse

Founded in 1976

100% ERP Focused

Year-Over-Year Growth, Industry Leader

Part of the Open Systems Adaptable Solutions Family

Global ERP Provider – Minneapolis, MN

5x Combined Revenue Growth over 10 Years

OSAS
Open Systems Adaptable Solutions

OSAS
Open Systems Adaptable Solutions
4301

Traverse Master

Founded in 1980
Greenville, SC

100% Focused on
Service Repair Industries

Year-Over-Year Growth,
Industry Leader

Part of the Open
Systems Adaptable
Solutions Family

Global ERP
Provider –
Minneapolis, MN

5x Combined
Revenue
Growth over
10 Years

OSAS
Open Systems Adaptable Solutions

OSAS
Open Systems Adaptable Solutions
4301

ProcessPro

Founded in 1985
St. Cloud, MN

100% Focused on Regulated Industries

Year-Over-Year Growth, Industry Leader

Part of the Open Systems Adaptable Solutions Family

Global ERP Provider – Minneapolis, MN

5x Combined Revenue Growth over 10 Years

OSAS
Open Systems Adaptable Solutions

OSAS
Open Systems Adaptable Solutions
4301

Impress

Founded in 1993
Minneapolis, MN

100% Focused on
Apparel Industry

Year-Over-Year Growth,
Industry Leader

Part of the Open
Systems Adaptable
Solutions Family

Global ERP
Provider –
Minneapolis, MN

5x Combined
Revenue
Growth over
10 Years

OSAS
Open Systems Adaptable Solutions

OSAS
Open Systems Adaptable Solutions
4301

Mission, Vision & Value

Mission

Deliver industry-leading software solutions.

Vision

Improve North American businesses with leading ERP solutions.

Value

Customer Focus

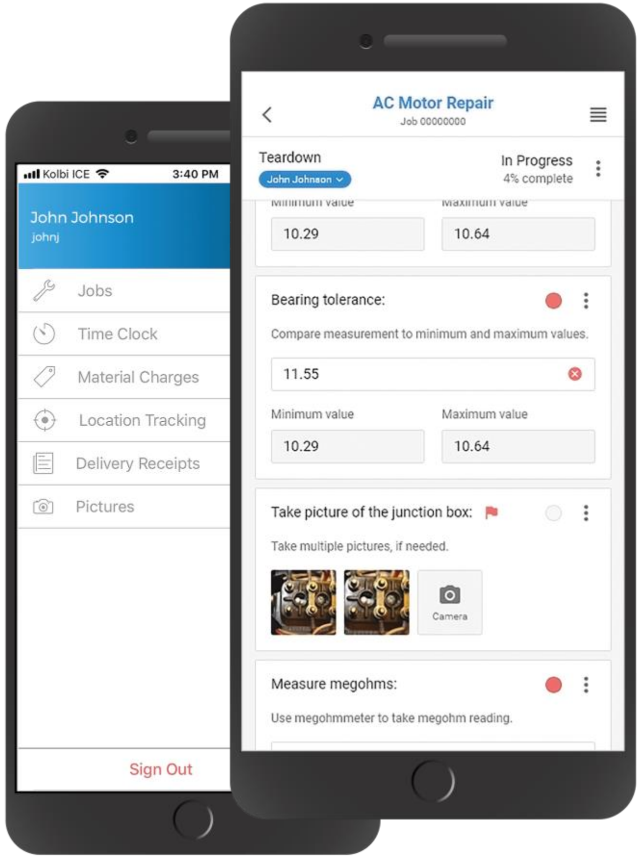
Constant Improvement

Sense of Urgency

OSAS
Open Systems Adaptable Solutions

Traverse Master

- Fully Integrated ERP Solution for the Service Repair Industry
- We Address the Needs of:
  - Hydraulic, Electro-Mechanical, Motor Shop, Pump and Apparatus Repair Companies
- No Resellers or 3rd Party Implementers
- US-based Technical Support
- Comprehensive, All-In-One Solution


Kolbi ICE
3:40 PM
John Johnson
johnj
Jobs
Time Clock
Material Charges
Location Tracking
Delivery Receipts
Pictures
Sign Out
AC Motor Repair
Job 00000000
Teardown
John Johnson
In Progress
4% complete
Camera

10.29
10.64

Bearing tolerance:

Compare measurement to minimum and maximum values.

11.55

Minimum value: 10.29
Maximum value: 10.64

Take picture of the junction box:

Take multiple pictures, if needed.

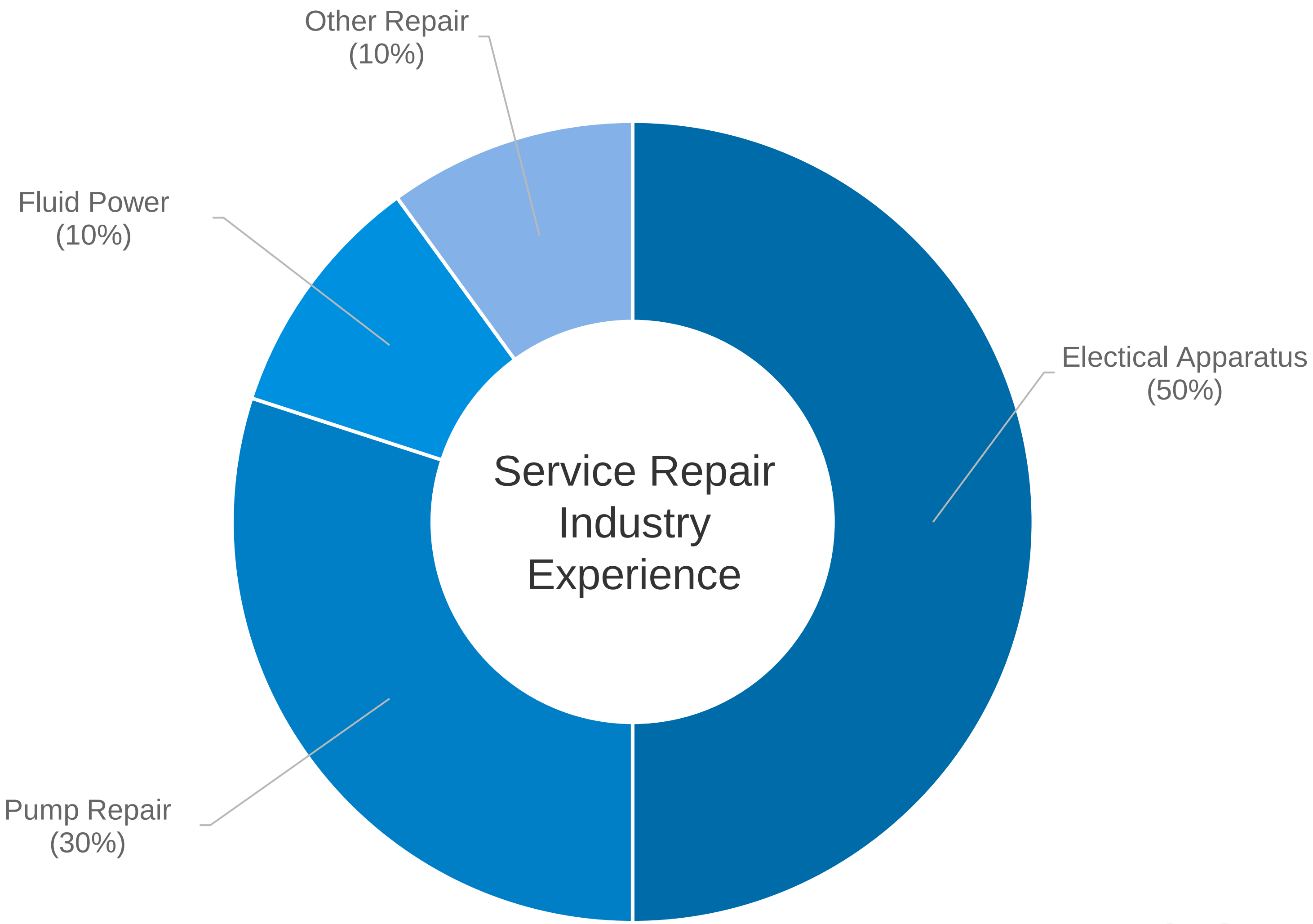
Measure megohms:

Use megohmmeter to take megohm reading.

OSAS
Open Systems Adaptable Solutions

Traverse Master

Traverse Master
Industry Breakdown



Electrical Apparatus: Motor Shop, Electro-Mechanical and Motor Rewinding

Pump Repair: Turbine, Submersible and General

Fluid Power: Hydraulic Repair

Other: Transformers, Spindles and Generators

OSAS
Open Systems Adaptable Solutions

ProcessPro Global

- Fully Integrated ERP Solution for Process Manufacturers
- Focused on Regulated Customers
  - FDA, 21CFR Part 11, Complete Audit Trails
  - NSF, SQF, ISO, cGMP
- No Resellers or 3rd Party Implementers
- US-based Technical Support
- Comprehensive, All-In-One Solution

ProccessPro

ProcessPro
Industry Breakdown

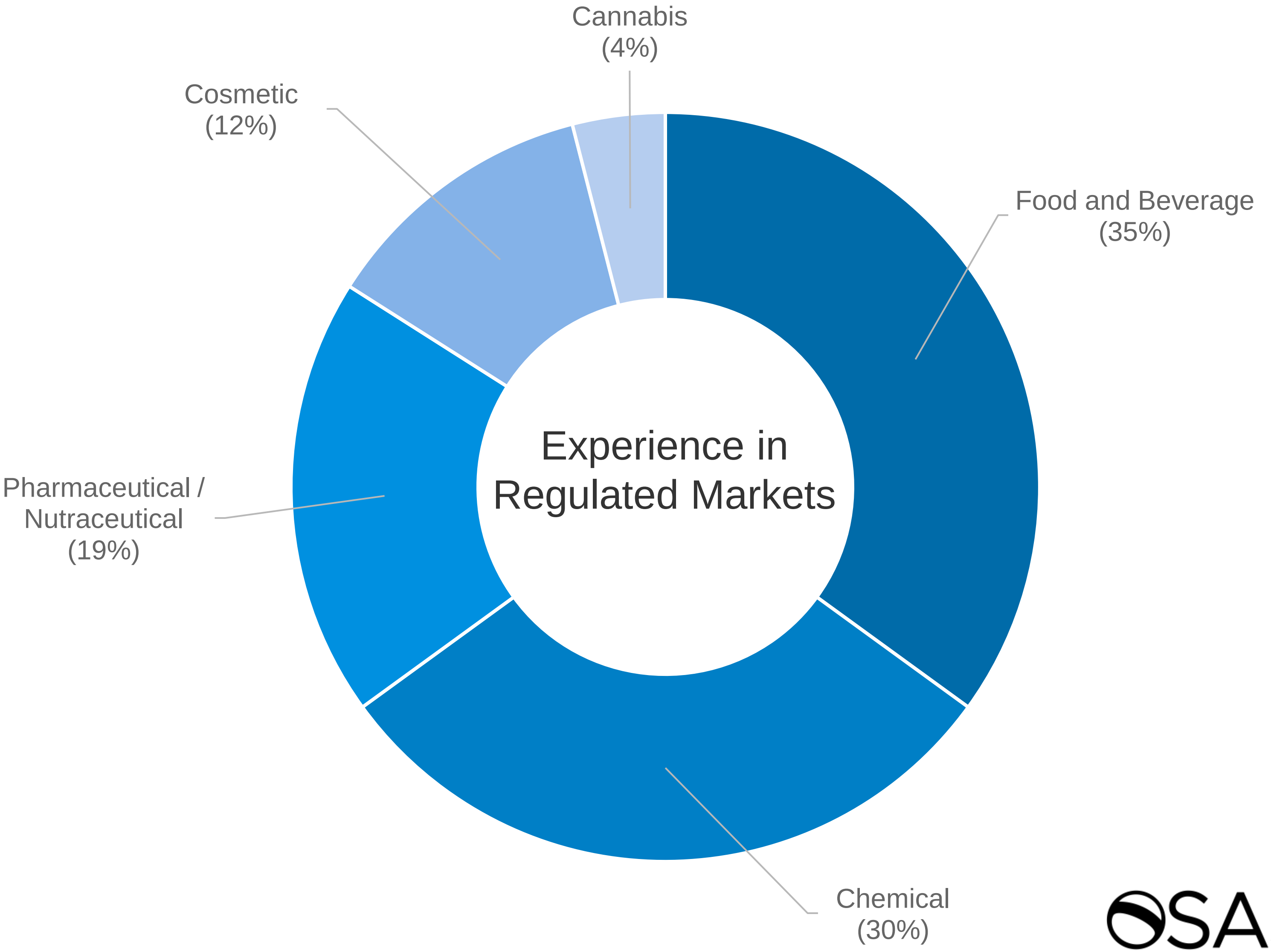
Food and Beverage: Bakery, Brewery, Distillery, Snack Food, Spices and Sauces

Chemical: Paints, Inks, Adhesives, Epoxy, Specialty Chemical, Coatings and Fragrances

Pharmaceutical / Nutraceutical: Dietary Supplements, Prescription, Vitamins and Herbals

Cosmetic: Personal Care, Lotions, Skin Care, Gels, Soaps and Oral Care

Cannabis: Cultivation, Extraction and Manufacturing



Traverse Customers

D&D GARAGE DOORS

Homestead Creamery

ETS POWER GROUP

KOMATSU

United Way
United Way of Washington County

HyVee

zerorez

goodwill

NORTHROP GRUMMAN

teleflora

ENNIS-FLINT
The Mark of Traffic Safety®

BROWNSTOWN Electric Supply Co.

Culligan Water

Alcoholics Anonymous®

Oklahoma Blood Institute

CREW2
The Home Services Specialists

Russell Hendrix
First in Foodservice Equipment & Supplies

MONEYTREE

Wendy's

Traverse Master Customers

HUPP
ELECTRIC
MOTORS

EMC
ELECTRIC MOTOR & CONTRACTING CO., INC. • CHESAPEAKE • COURTLAND •

LANDON ELECTRIC COMPANY
Industrial Supply and Repair

HECO
All systems go
Electric Motors • Performance Systems

endeavor
technologies | beyond repair

AmericanMTS

GMR
ELECTRIC MOTORS LTD

EVANS
Since 1954

EMERALD
TRANSFORMER

NorthPoint
TECHNICAL SERVICES

Kentucky Service Co.
Serving Industry Since 1968

Ward Leonard

EMS Industrial, Inc.
Providing quality solutions since 1935.

ProcessPro Customers

Primrose Candy Co. Since 1928

WERNER
READY FOR everything

HyVee
EMPLOYEE OWNED

Lawler's
DESSERTS
"The Best For Last"
Family Owned and Operated
Since 1976

READY FOODS
Home of Marco's Products

SR Originals
EST. 1995

Gourmet
KITCHEN

kinnikinnick
FOODS

"EL POPOCATEPETL"
FOOD PRODUCTS
LIMPIEZA y CALIDAD

Abdallah
CHOCOLATES
SINCE 1909

BEAR REPUBLIC BREWING CO.

PRAESTANTIA VALET
Celebrating 100 Years!
SINCE 1918
"QUALITY PREVAILS"
FRUITCROWN
Products Corporation

CEDAR CREST
ICE CREAM

parker
PRODUCTS

SINCE 1960
SEVIROLI

OSAS
Open Systems Adaptable Solutions

ProcessPro Customers

21ST CENTURY®

NOVA-TECH
PURE PERFORMANCE

FoodScience®
CORPORATION

MARCO
PHARMA

UASLabs
The Probiotic Company™

TRIVIDIA
HEALTH™

americanBIO

ALL AMERICAN
PHARMACEUTICAL

STRATOS™

PN®
Pacific Nutritional Inc.

ULTRA
LABORATORIES®
"The Additive-Free Company"

Ei™
A PHARMACEUTICAL
SOLUTIONWORKS™

ProcessPro Clients

DEEPWATER CHEMICALS

AMERICAN COLORS® INC.

BELL™ International Laboratories

ADHESIVES TECHNOLOGY CORP.

OPTIMA CHEMICAL

CP® chem-pak, INC.

BRANDT® Professional Agriculture®

TROPICAL ROOFING PRODUCTS

EPOXY® TECHNOLOGY

ESTRON CHEMICAL THE EDGE OF INNOVATION

GAGE solvents recycling fuels solutions

Seacole Specialty Chemical

APEXICAL

HRI

ProcessPro Clients

FILLTECH USA

ARYLESSENCE®
Creative FRAGRANCE & FLAVOR Solutions

J. Strickland & Co.

HATCHBEAUTY

Swiss
American
CDMO

LIFETECH
RESOURCES

BELL™
International Laboratories

columbia cosmetics
MANUFACTURING, INC

Active
Concepts
Tomorrow's vision...*Today!*®

elba
LABORATORIES

COSMETIC
GROUP USA, INC.

NORTHWEST
COSMETIC LABS

CELMARK
INTERNATIONAL INC.

Cosmetic Enterprises, Ltd.

Impress Customers

MODERN
STITCH&INK

C.C. CREATIONS

Stoked
ON
PRINTING

GILDAN®

THE
Graphic
edge

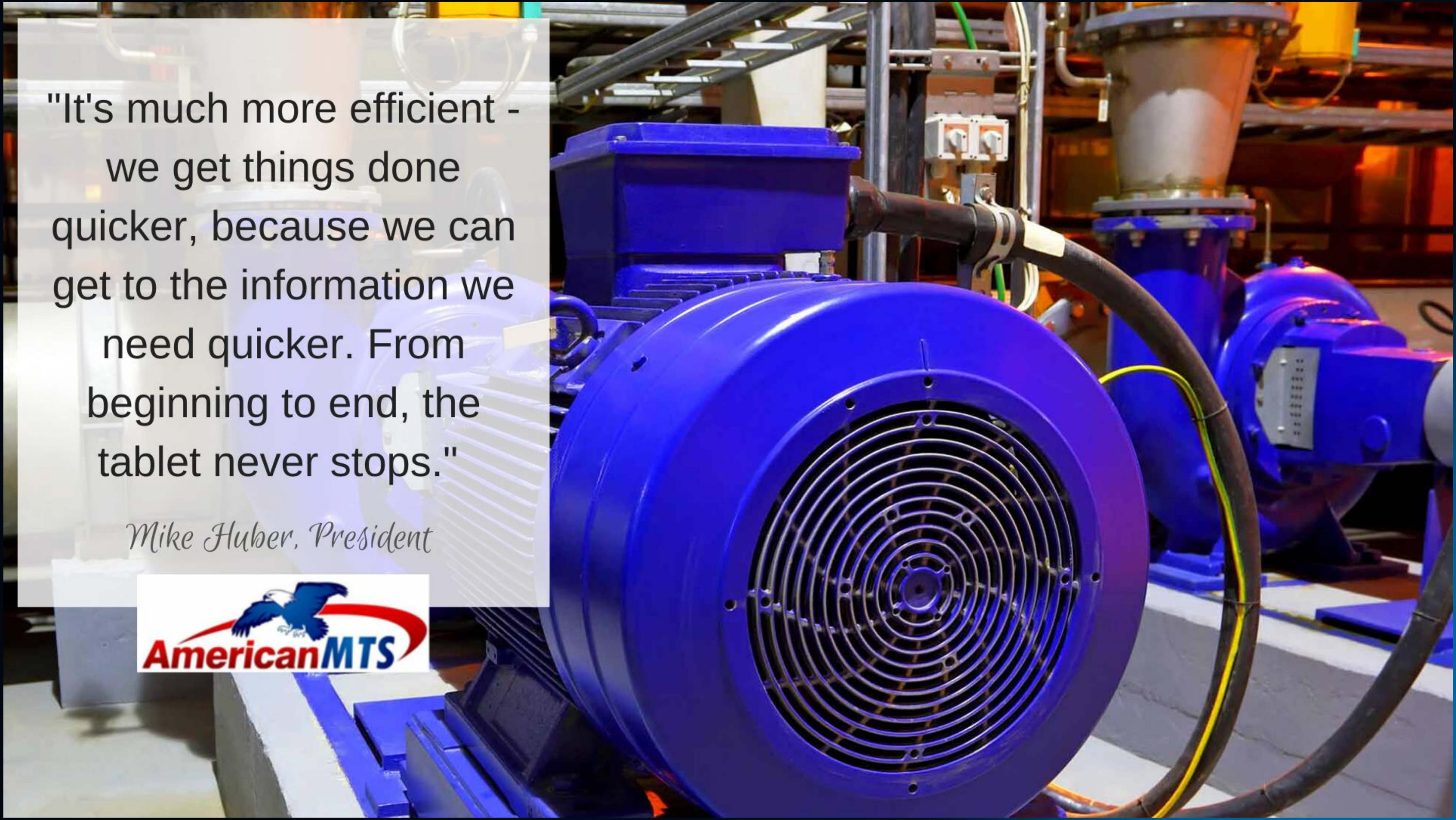
PERRIN
RESORT AND COLLEGIATE APPAREL

VAPOR™
APPAREL

VANTAGE

green
DISTRIBUTION

OSAS
Open Systems Adaptable Solutions



"It's much more efficient - we get things done quicker, because we can get to the information we need quicker. From beginning to end, the tablet never stops."

Mike Huber, President

AmericanMTS

OSAS
Open Systems Adaptable Solutions

"Moving from ACS to TRAVERSE proved to be one of the best business decisions we could have made. While challenging, the implementation team at Open Systems was there every step of the way, and our business has become much more streamlined because of it. The software actually paid for itself inside of the first year. I would highly recommend this to anyone serious about growing their Service Repair business."

Doug Moore, President

Kentucky Service Co.
Serving Industry Since 1968

OSAS
Open Systems Adaptable Solutions

Technology

- Windows OS and SQL Database
- .NET Architecture
- Software Releases every 6-8 Months
- Adopt Technology that Improves User Functionality
  - Not Technology for Technology Sake
  - Leading Edge, Not Bleeding Edge

Product Strategy

- Focus on Market Leading Capability with tightly Integrated Core Service Repair Functionality
  - Service, Job Cost, Inventory, Scheduling and Name Plate Tracking, Planning Boards, Job Portals, Inspection Queues and Distribution
- Partner with Industry-Leading Companies that provide Essential Functionality to a subset of our Customers
- Provide Robust Business Intelligence to closely and easily Monitor Business Performance

OSAS
Open Systems Adaptable Solutions

World Class Partners

- Core ERP – 100% OSAS Responsibility
- Critical Outside Requirements
  - Find the BEST Solution Provider
  - Form Strong Partnerships
  - Jointly Develop and Support Interface
  - OSAS always provides First Level Call Support
- You Require the BEST and cannot be limited by One Company's Expertise

Avalara™
uniPoint Quality for ProcessPro
FM
TrueCommerce
SPS COMMERCE
vantiv
esha RESEARCH
TSYS

ABETECH Bar Code & RFID Solutions
AATRIX
NELCO
LISAM SYSTEMS
docUnity
openedge
DIMENSION FUNDING

OSAS
Open Systems Adaptable Solutions

Impress Key Integrations

TSYS®

Powered by OSAS
Traverse

Avalara™

UNITED STATES
POSTAL SERVICE

SANMAR

S&S
ACTIVEWEAR

ups®

ORDERMYGEAR

FANATICS®

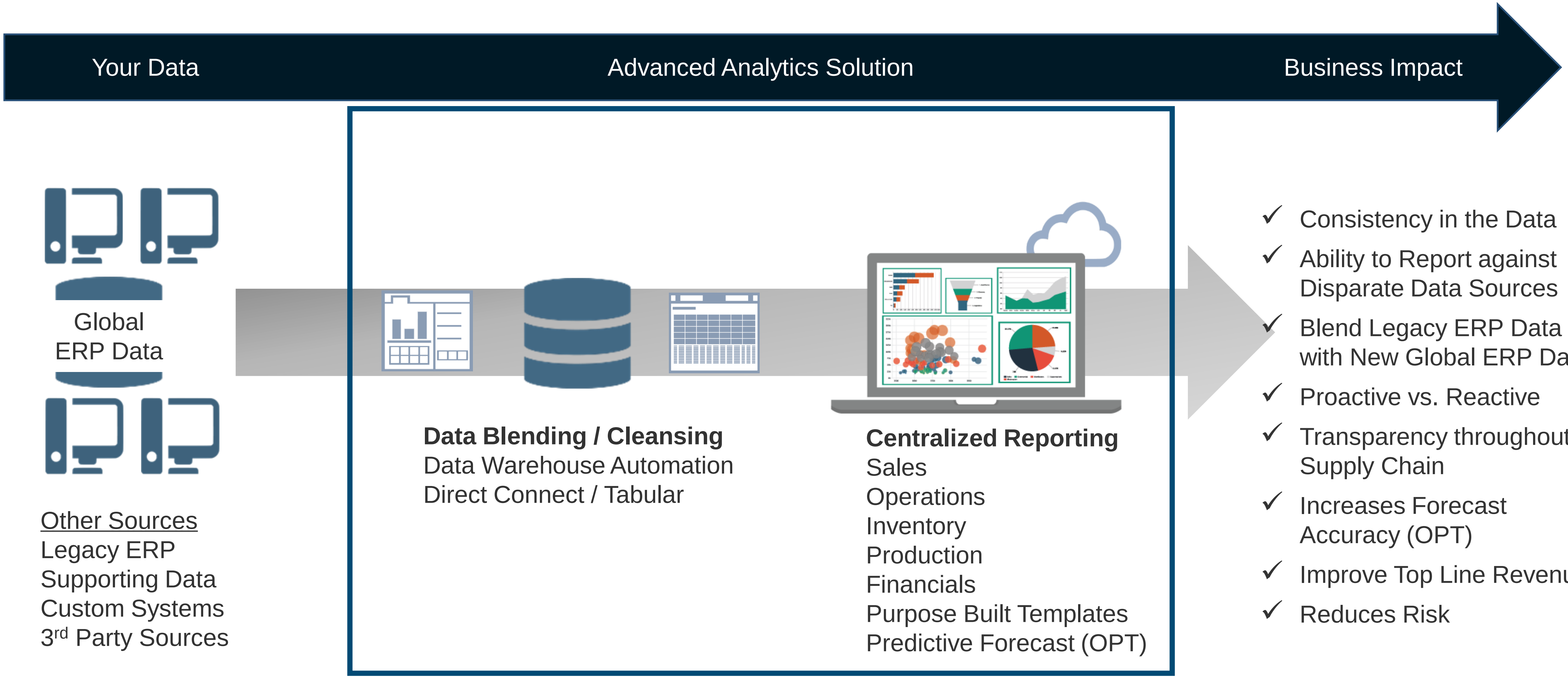
FedEx

alphabroder

VANTAGE

OSAS
Open Systems Adaptable Solutions

Advanced Analytics



Your Data

Advanced Analytics Solution

Business Impact

Global
ERP Data

Other Sources
Legacy ERP
Supporting Data
Custom Systems
3rd Party Sources

Data Blending / Cleansing
Data Warehouse Automation
Direct Connect / Tabular

Centralized Reporting
Sales
Operations
Inventory
Production
Financials
Purpose Built Templates
Predictive Forecast (OPT)

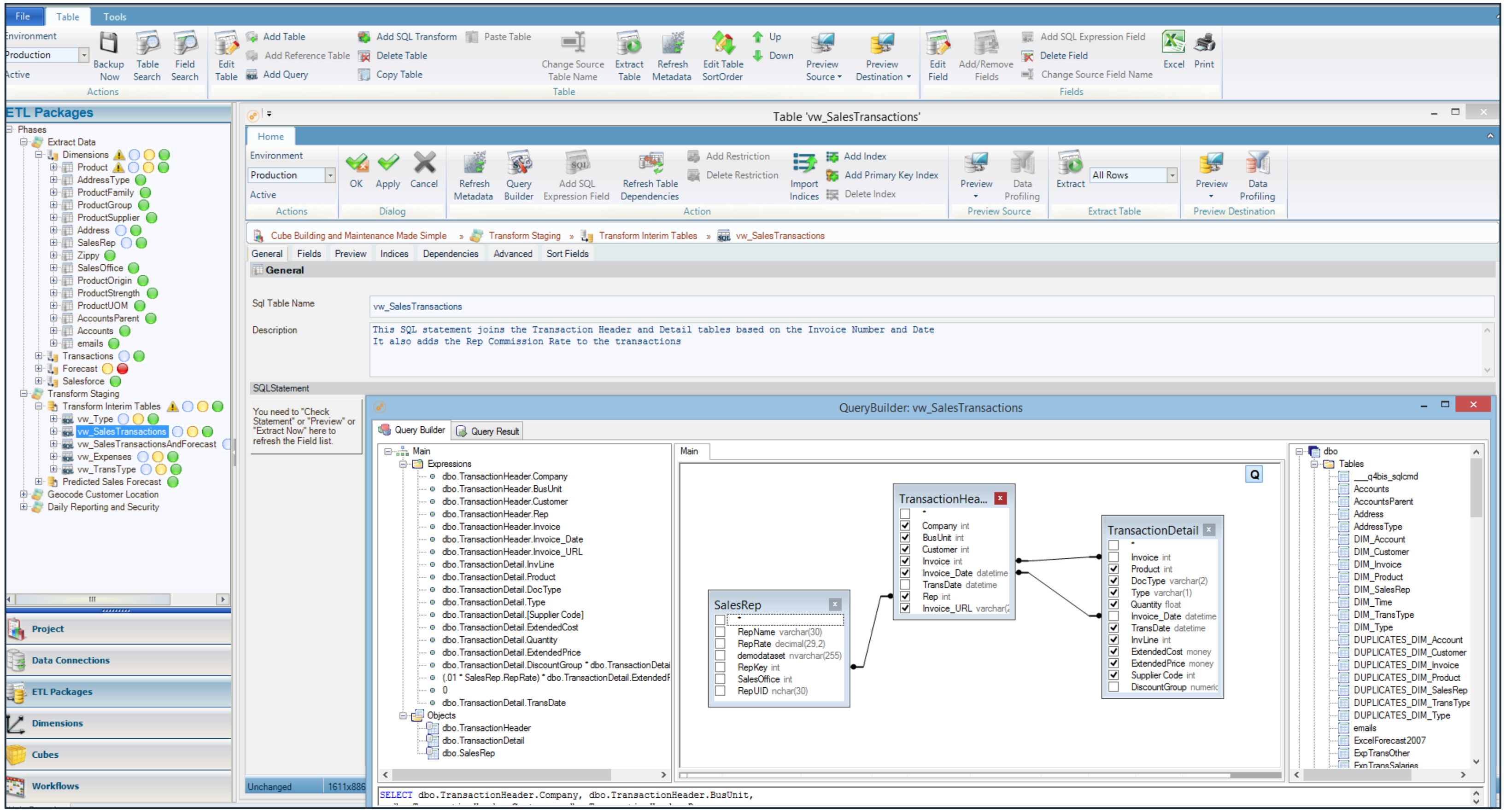
- ✓ Consistency in the Data
- ✓ Ability to Report against Disparate Data Sources
- ✓ Blend Legacy ERP Data with New Global ERP Data
- ✓ Proactive vs. Reactive
- ✓ Transparency throughout Supply Chain
- ✓ Increases Forecast Accuracy (OPT)
- ✓ Improve Top Line Revenue
- ✓ Reduces Risk

OSAS
Open Systems Adaptable Solutions

Advanced Analytics

Data Warehousing: Automated and Simplified

- ✓ Pre-configured Data Warehouse
- ✓ Templated Views / Reports
- ✓ Templated Dashboards
- ✓ Data Security
- ✓ User Security
- ✓ Hierarchy Manager
- ✓ ETL SSIS Accelerators
- ✓ OLAP Wizard



File
Table
Tools
ETL Packages
Phases
Extract Data
Dimensions
Transform Staging
Transform Interim Tables
vw_SalesTransactions
Project
Data Connections
ETL Packages
Dimensions
Cubes
Workflows
Table 'vw_SalesTransactions'
Cube Building and Maintenance Made Simple » Transform Staging » Transform Interim Tables » vw_SalesTransactions
General
Fields
Preview
Indices
Dependencies
Advanced
Sort Fields
QueryBuilder: vw_SalesTransactions
Query Builder
Query Result
SalesRep
TransactionHeader
TransactionDetail

Sql Table Name: vw_SalesTransactions

Description: This SQL statement joins the Transaction Header and Detail tables based on the Invoice Number and Date It also adds the Rep Commission Rate to the transactions

SQLStatement

You need to "Check Statement" or "Preview" or "Extract Now" here to refresh the Field list.

Unchanged 1611x886

```
SELECT dbo.TransactionHeader.Company, dbo.TransactionHeader.BusUnit,
```

OSAS Services

- ✓ Sales
- ✓ Customization / Training
- ✓ Change Management
- ✓ Data Migration
- ✓ Implementation
- ✓ Maintenance and Support
- ✓ IT Service / Hardware
- ✓ Utilization Assessment

OSAS
Open Systems Adaptable Solutions

Implementation

- Strongly Encourage Baseline Functionality
- Customize only if Business Critical
  - May consider for base product
  - Upgrades with a fraction of initial effort and cost
- You Decide what Provides Competitive Advantage

Implementation Methodology

Define

- Discovery
- Business Process Review
- Software Demo & Discussion
- Project Estimates
- Client Approval

Plan

- Project Initiation
- Kickoff
- Implementation Process Review
- Timeline Review

Design

- Business Environment Analysis
- Workflow Review
- Solution Documentation

Develop

- Adapt ERP
- System Setup
- Approval of Scope Documents
- Data Activities

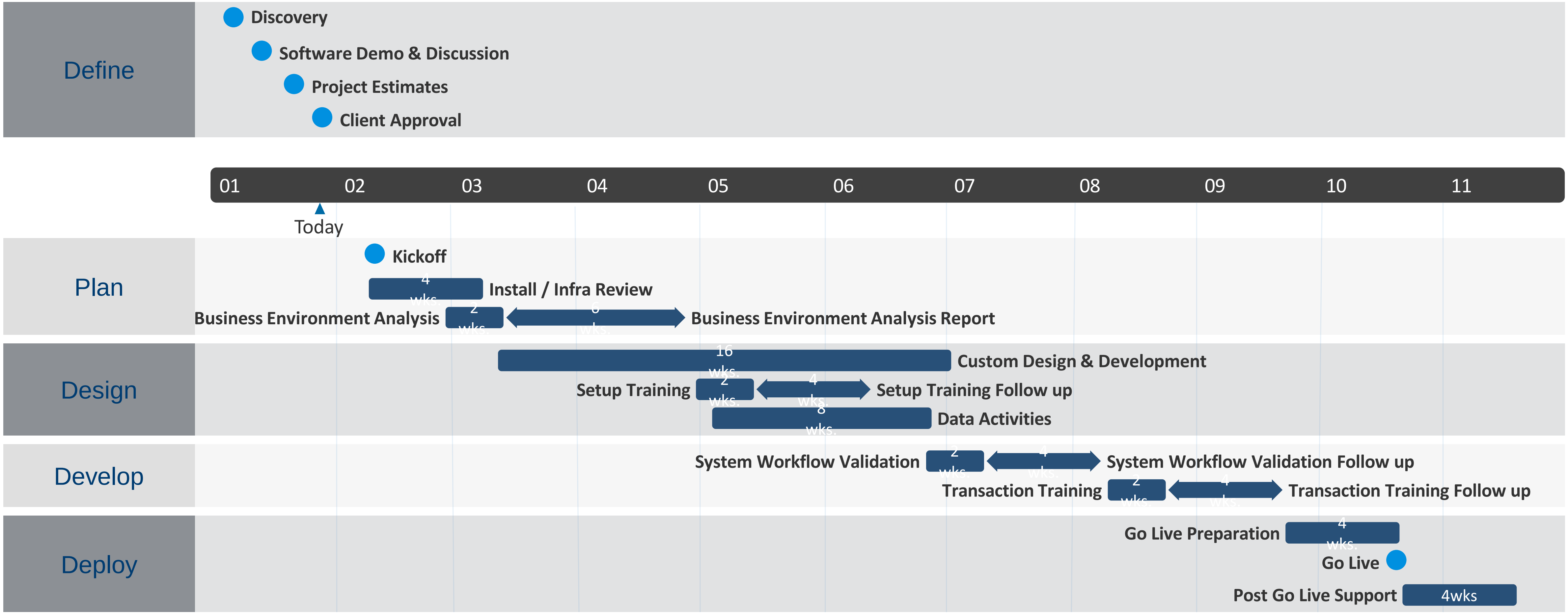
Deploy

- Deliver Modifications
- End-User Training
- User Acceptance Testing
- Go Live Implementation
- Support Transition

OSAS
Open Systems Adaptable Solutions

Implementation Timeline

Sample Timeline



Define
- Discovery
- Software Demo & Discussion
- Project Estimates
- Client Approval

Plan
- Kickoff
- Install / Infra Review
- Business Environment Analysis
- Business Environment Analysis Report

Design
- Custom Design & Development
- Setup Training
- Setup Training Follow up
- Data Activities

Develop
- System Workflow Validation
- System Workflow Validation Follow up
- Transaction Training
- Transaction Training Follow up

Deploy
- Go Live Preparation
- Go Live
- Post Go Live Support

OSAS
Open Systems Adaptable Solutions

Support

- Ongoing Help Desk Support
  - All from internal Minnesota-based team
  - Every call is tracked with follow-up communications
  - Self-help, built into the solution and available online
- Annual Connect User Conference and On-line Forum
- IT Support
  - Server and Hardware Requirements and Assistance
  - Server Preparation and System Configuration
  - Backup, Storage and Redundancy Packages

Back To Distribution

OSAS
Open Systems Adaptable Solutions

Preferred Solution Of CPA.com

SAGE INTACCT

Sage Intacct

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Key Facts About Sage

3M
Customers Worldwide

$2.3B
Global Revenue

37
Years Serving Customers

23
Countries Served

13K
Colleagues Worldwide

BUSINESS STRATEGY
85%

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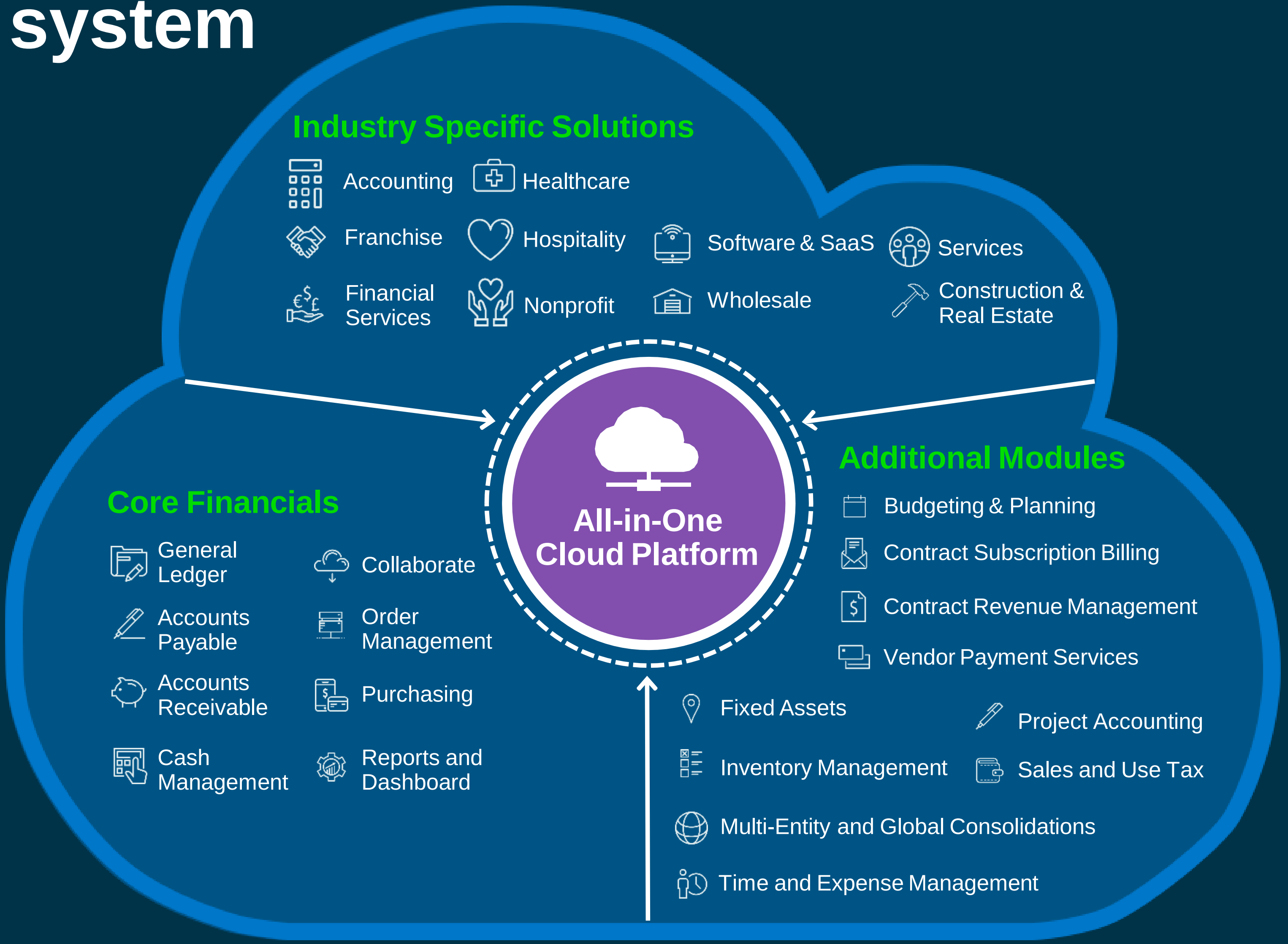
Sage Intacct - Powerful 'born in the cloud' financial management system

sage Intacct

- Native Cloud from the 1st line of code
- Deep multi-dimensional accounting & automation for efficient financial operations
- Sophisticated visibility for real-time decision making
- Best of breed, easy integration to other solutions
- Fresh & modern user interface
- Designed for CFOs and professional finance teams looking for a powerful solution



Industry Specific Solutions

- Accounting
- Healthcare
- Franchise
- Hospitality
- Software & SaaS
- Services
- Financial Services
- Nonprofit
- Wholesale
- Construction & Real Estate

All-in-One Cloud Platform

Core Financials

- General Ledger
- Accounts Payable
- Accounts Receivable
- Cash Management
- Collaborate
- Order Management
- Purchasing
- Reports and Dashboard

Additional Modules

- Budgeting & Planning
- Contract Subscription Billing
- Contract Revenue Management
- Vendor Payment Services
- Fixed Assets
- Project Accounting
- Inventory Management
- Sales and Use Tax
- Multi-Entity and Global Consolidations
- Time and Expense Management

AICPA Business Solutions
Preferred Provider of Financial Applications

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From start-up to market leader

sage Intacct

1999
Intacct was founded as one of the first accounting applications for the cloud

2000
Established momentum and partnerships with accounting firms

2005
Creates exclusive pre-built CRM integration with Salesforce

salesforce

2009
Receives exclusive AICPA endorsement

AICPA

2011
Recognized as a top place to work in the country in SMB and a cool place to work since 2011

2017
Sage, the largest technology firm in the UK, with a presence in 26 countries, **acquires Intacct**

2019
Sage Intacct launched into Australia and UK markets

2020
Achieved 20th year of growth

1999 2000 2005 2009 2011 2017 2019 2020

AICPA Business Solutions
Preferred Provider of Financial Applications

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sage Intacct

Deep cross-industry functionality

Best-in-class financials

Best-in-class cloud platform

Transforming the way people think and work so their organizations can thrive

AICPA Business Solutions
Preferred Provider of Financial Applications

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Deep cross-industry functionality

Software

NFP

Professional Services

Financial Services

Healthcare

Hospitality

Wholesale / Distribution

Construction

More…

Functionality optimized for unique industry needs

Best-in-class financials

Best-in-class cloud platform

Transforming the way people think and work so their organizations can thrive

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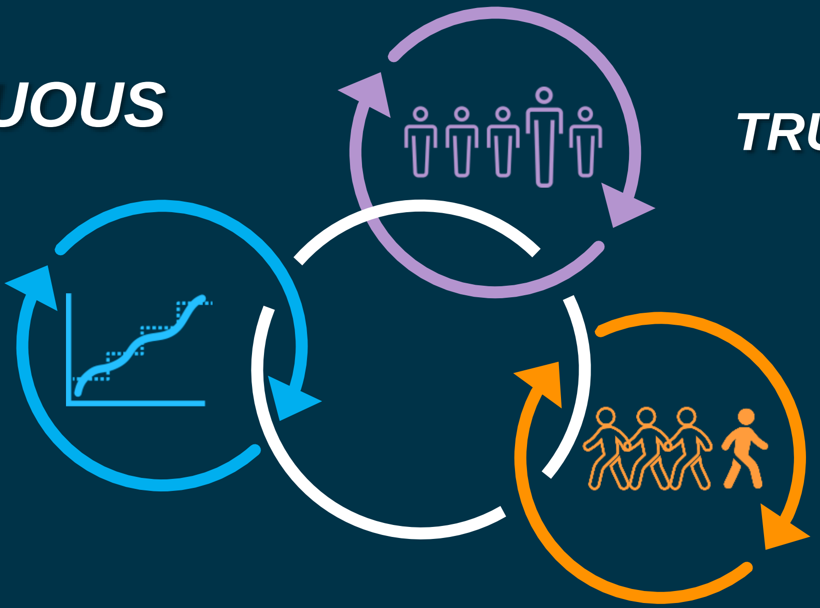
sage Intacct

Deep cross-industry functionality

Best-in-class financials



CONTINUOUS

ACCOUNTING

TRUST

INSIGHTS

Best-in-class cloud platform

Transforming the way people think and work so their organizations can thrive

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Preferred Provider of Financial Applications

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Deep cross-industry functionality

Best-in-class financials

Best-in-class cloud platform

User experience

Developer experience

Infrastructure

Transforming the way people think and work so their organizations can thrive

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Security and privacy culture

sage Intacct

Background check before hire and annual security training for all employees

Production networks segregated with restricted physical and logical access

Continuous internal threat monitoring and quarterly third-party testing

Access to customer data granted by the customer—even to Sage Intacct support

Field-level encryption and auditing and secure browser sessions

AICPA Business Solutions
Preferred Provider of Financial Applications

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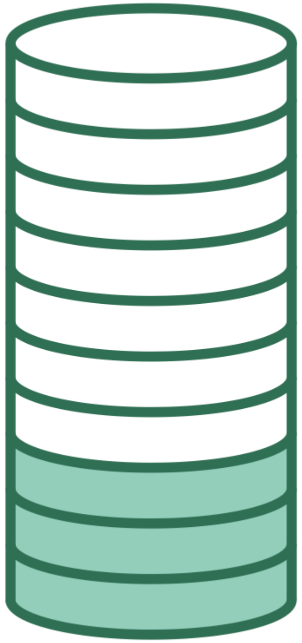
Reliability—as important as cyber security

sage Intacct

UPTIME COMMITMENT

99.8%

EXTRA CAPACITY



extreme traffic capacity

average server traffic

REDUNDANCY

FULL NIGHTLY
logical & physical
BACKUPS

BACKUPS SHIPPED
to: **local collectors**
NAS
DR site
AWS Glacier

96 HOUR
flashback to the minute
rehearsed quarterly

What you need, when you need it

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Strategic relationships

aws

salesforce

AMERICAN EXPRESS

Avalara

ADP

pwc

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Extensive Marketplace Solutions

AP Workflow

- STAMPLI
- PN Solutions
- Webiplex
- PAPERSAVE Efficiency. Simplified.
- roger
- EchoVera
- WORKFLOW AnyWare

AP Payments

- AMERICAN EXPRESS
- tipalti
- bill.com
- Beanworks
- yooz
- FISPAN
- mineraltree AP and Payment Automation
- PLATE IQ
- Paymode-X
- NEXUS
- avidxchange
- CORPORATE SPENDING INNOVATIONS
- Paypool

AP Purchasing

- Paramount WorkPlace
- Teampay
- bluvault
- [me] marginedge
- iCOMPLEAT
- coupa
- NEXUS
- PROCUREMENT PARTNERS
- Bellwether
- BIZTERA SPECTRUM

AR Automation

- Invoiced Autopilot for A/R
- BlueSnap
- versapay
- YayPay
- CLEARENT INTELLIGENT PROCESSING
- Tesorio
- paya
- Anytime Collect connected by LOCKSTEP
- OMNIFUND

Budgeting & Planning

- MARTUS
- AppComputing
- centage
- AXIOM
- planful
- limelight
- Prophix
- Questica
- Vena
- solver
- True Sky
- Adaptive Insights
- DataRails
- Jirav

Inventory Management

- QStock INVENTORY
- SALESPAD
- ScanForce
- Bellwether
- DEPOSCO
- PARITY FACTORY
- HYBRENT SUPPLYING INTELLIGENCE
- WHEREFOUR
- StoneSpot

Time, Expense, Travel, Attendance

- webexpenses
- nexonia
- ExpensePath
- abacus
- Expensify
- Tallie
- Jira Connector
- TimeTracker by eBillity
- CONCUR
- TriNet Expense

Document Management

- Webiplex
- DocLink
- PAPERSAVE Efficiency. Simplified.
- uplevl
- RICOH imagine. change.
- PN Solutions

Donor / Grants Management

- FLUXX

EDI

- 1EDISOURCE
- B2BGATEWAY
- TrueCommerce

Close Management

- adra by TRINTECH
- BLACKLINE
- FloQast

Fixed Asset & Leasing

- LeaseQuery
- iLeasePro
- ASSETEDGE by JOSEPH EVE
- Real Asset Management An MRI Software Company

HCM & Payroll

- workforce go! HCM
- ADP
- PAYCHEX
- Spectrum
- Criterion HCM
- Proliant
- RIPPLING
- Ascentis
- aps

Commission & Incentive Compensation

- GREYTRIX Sales Commission
- QCommission
- Xactly

Manufacturing

- MISys manufacturing
- WHEREFOUR

Payment Processing

- 2CP CUSTOM PAYMENT SOLUTIONS
- PayPal
- paya
- stripe
- Authorize.Net a CyberSource solution

Project Management

- upland PSA
- REPLICON
- Projector
- KEYEDIN
- m-connect
- PROCORE

Field Service Management

- KloudGin
- ServiceTitan
- FieldConnect
- PROFORM
- servicetrade
- FieldFX

AI / Analytics/ Reporting

- DOMO
- cream ANALYTICS
- AUDITORIA
- Fivetran
- FitnessBI

Restaurant Management

- [me] marginedge
- QSROnline
- compeat
- MarketMan
- cohesion

Association Management

- PROTECH ASSOCIATES
- impexium

Checks & Supplies

- Forms for sage Intacct
- sage Intacct Check Delivery Service
- sage Intacct Checks & Supplies

Spend / Cash Management

- accrualify
- Blissfully
- G2
- airbase
- Validis
- CLEANSHELF
- intello
- ZYLO
- TROVATA.IO
- dryrun

Tax Management

- Avalara
- tax1099.com POWERED BY ZENWORK

CRM

- salesforce
- sugarcrm
- sage CRM
- Microsoft Dynamics CRM

Tools

- Aquera
- Platform Transition
- cdata
- workato
- dbsync
- SourceShip CONNECT
- FASTPATH
- ROGHNU
- AcctTwo

Wealth & Asset Management

- AppComputing
- KnowLedger
- CenDat Solutions LLC

Professional Services

- BIGTIME
- krow
- CMAP
- KIMBLE

200+ Partners | **75% of our customers integrate with 2+ partners**

Recognized for finance leadership by experts

sage Intacct

AICPA

Leader
SPRING
2020

Industry Analysts

Preferred
Provider

#1
Customer Satisfaction

Visionary
Cloud Financial Management

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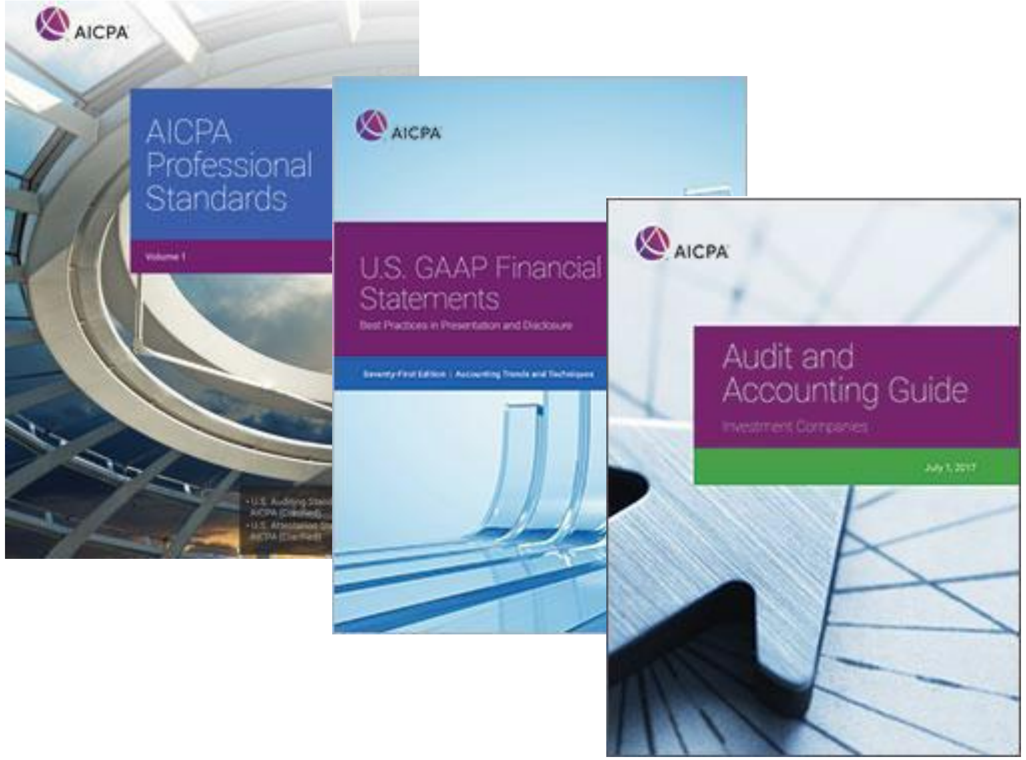
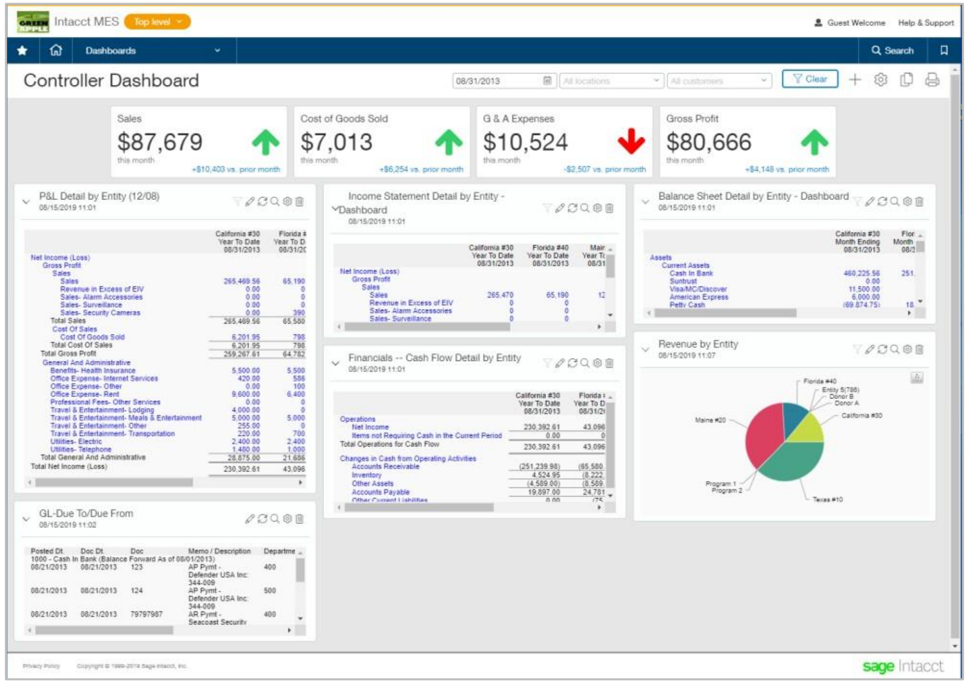
Only Sage Intacct is preferred by the AICPA


AICPA
AICPA Professional Standards
Volume 1
AICPA
U.S. GAAP Financial Statements
Best Practices in Presentation and Disclosure
Seventy-First Edition | Accounting Trends and Techniques
AICPA
Audit and Accounting Guide
Investment Companies
July 1, 2017

The AICPA "wrote the book" on accounting


Intacct MES
Top level
Guest Welcome
Help & Support
Dashboards
Search
Clear

Controller Dashboard

08/31/2013

Sales	Cost of Goods Sold	G & A Expenses	Gross Profit
$87,679	$7,013	$10,524	$80,666
this month	this month	this month	this month
+$10,403 vs. prior month	+$6,254 vs. prior month	-$2,507 vs. prior month	+$4,148 vs. prior month

P&L Detail by Entity (12/08)

Income Statement Detail by Entity - Dashboard

Balance Sheet Detail by Entity - Dashboard

Financials -- Cash Flow Detail by Entity

Revenue by Entity

GL-Due To/Due From

Of all the systems reviewed, only Sage Intacct is preferred

AICPA Business Solutions
Preferred Provider of Financial Applications

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Accountants choose us

sage Intacct

Accountants' Role in the
Global Economy
CFO's Evolving Role
Audit Transformation
Fraud and
Advocacy.

Russell Guthrie, Sage Intacct CFO Summit

"From my standpoint as a CFO, the key process improvement that Intacct has provided really is around timeliness. It allows us to focus on other strategic aspects of the business. **We can spend less time doing our internal accounting and focus more on what we want to accomplish as an organization.**"

- Russell Guthrie, CFO, IFAC

IFAC International Federation of Accountants

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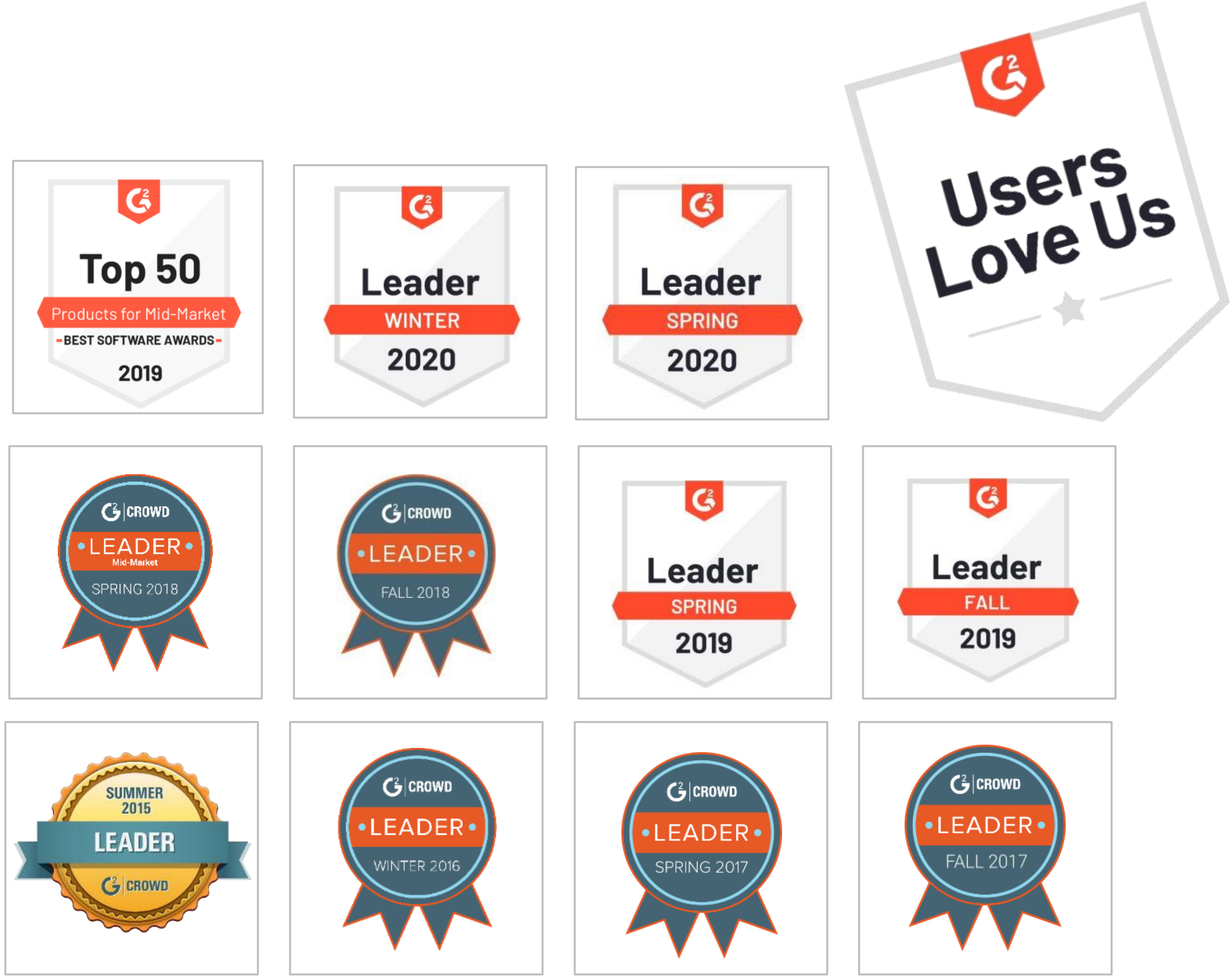
#1 in customer satisfaction year after year


Top 50
Products for Mid-Market
BEST SOFTWARE AWARDS
2019
Leader
WINTER
2020
Leader
SPRING
2020
Users Love Us
CROWD
LEADER
Mid-Market
SPRING 2018
CROWD
LEADER
FALL 2018
Leader
SPRING
2019
Leader
FALL
2019
SUMMER
2015
LEADER
CROWD
CROWD
LEADER
WINTER 2016
CROWD
LEADER
SPRING 2017
CROWD
LEADER
FALL 2017

Since 2015, compared to other cloud accounting vendors, Sage Intacct had **highest scores** on:

- ✓ Satisfaction
- ✓ Product Direction
- ✓ Net Promoter Score

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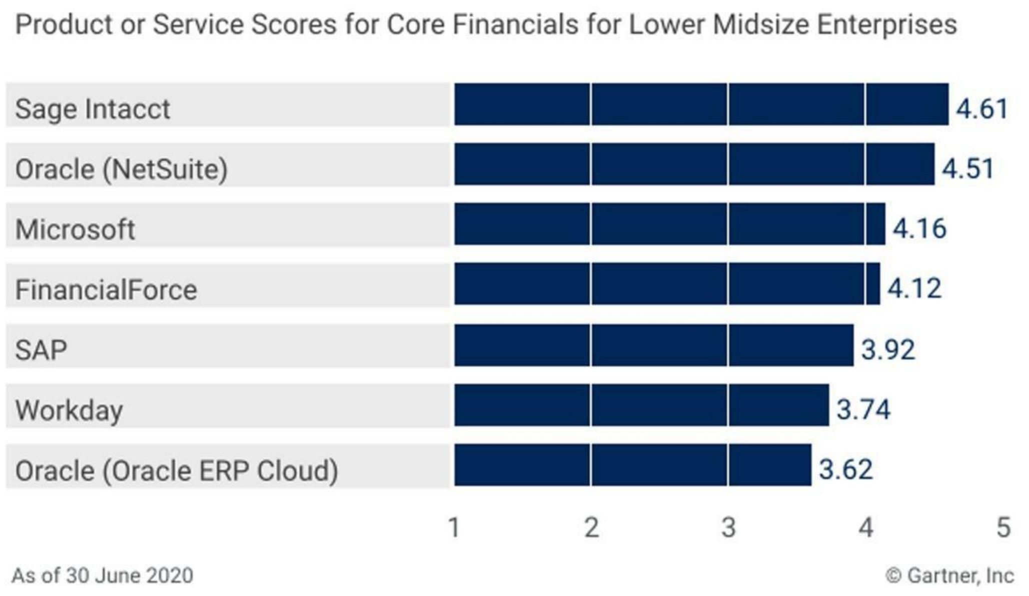
sage Intacct

It's a four-peat!
For the 4th year in a row…

Sage Intacct receives the **highest product score** **in Core Financials for the Lower Midsize Enterprises Use Case** in Gartner's 2020 Critical Capabilities for Cloud Core Financial Management Suites for Midsize, Large and Global Enterprises report

Figure 1. Vendors' Product Scores for Core Financials for Lower Midsize Enterprises Use Case



Source: Gartner (July 2020)

This graphic was published by Gartner, Inc. as part of a larger research document and should be evaluated in the context of the entire document. The Gartner document is available upon request from Sage. Gartner does not endorse any vendor, product or service depicted in its research publications, and does not advise technology users to select only those vendors with the highest ratings or other designation. Gartner research publications consist of the opinions of Gartner's research organization and should not be construed as statements of fact. Gartner disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

Source: Gartner, Inc., "Critical Capabilities for Cloud Core Financial Management Suites for Midsize, Large, and Global Enterprises"; Robert Anderson, John Van Decker, Greg Leiter; July 14, 2020 (ID: G00407163) (In the 2017 report Sage Intacct was recognized as "Intacct")

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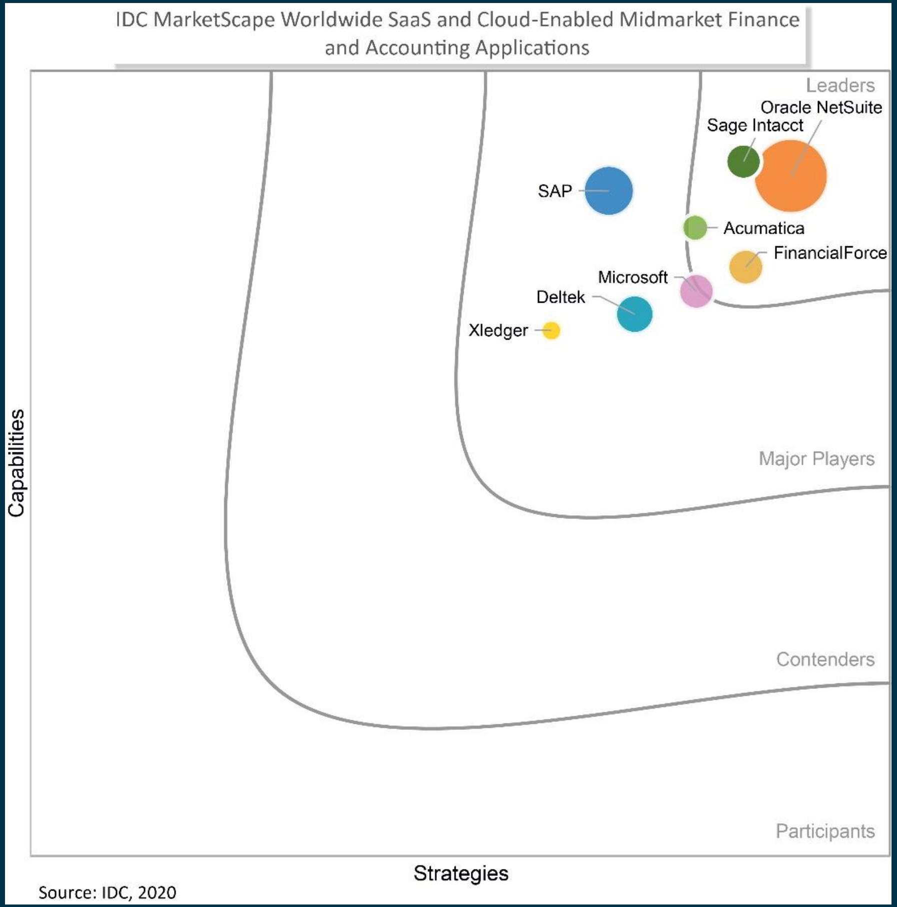
Sage Intacct Named a **Leader** by the IDC MarketScape in Worldwide SaaS and Cloud-Enabled Midmarket Finance and Accounting Applications



Source: IDC, 2020

IDC MarketScape vendor analysis model is designed to provide an overview of the competitive fitness of ICT suppliers in a given market. The research methodology utilizes a rigorous scoring methodology based on both qualitative and quantitative criteria that results in a single graphical illustration of each vendor's position within a given market. The Capabilities score measures vendor product, go-to-market and business execution in the short-term. The Strategy score measures alignment of vendor strategies with customer requirements in a 3-5-year timeframe. Vendor market share is represented by the size of the circles. Vendor year-over-year growth rate relative to the given market is indicated by a plus, neutral or minus next to the vendor name.

Source: IDC MarketScape: Worldwide SaaS and Cloud-Enabled Midmarket Finance and Accounting Applications 2020 Vendor Assessment", by Kevin Permenter, Frank Della Rosa, Shari Lava and Mickey North Rizza, April 2020, IDC # US45837220.

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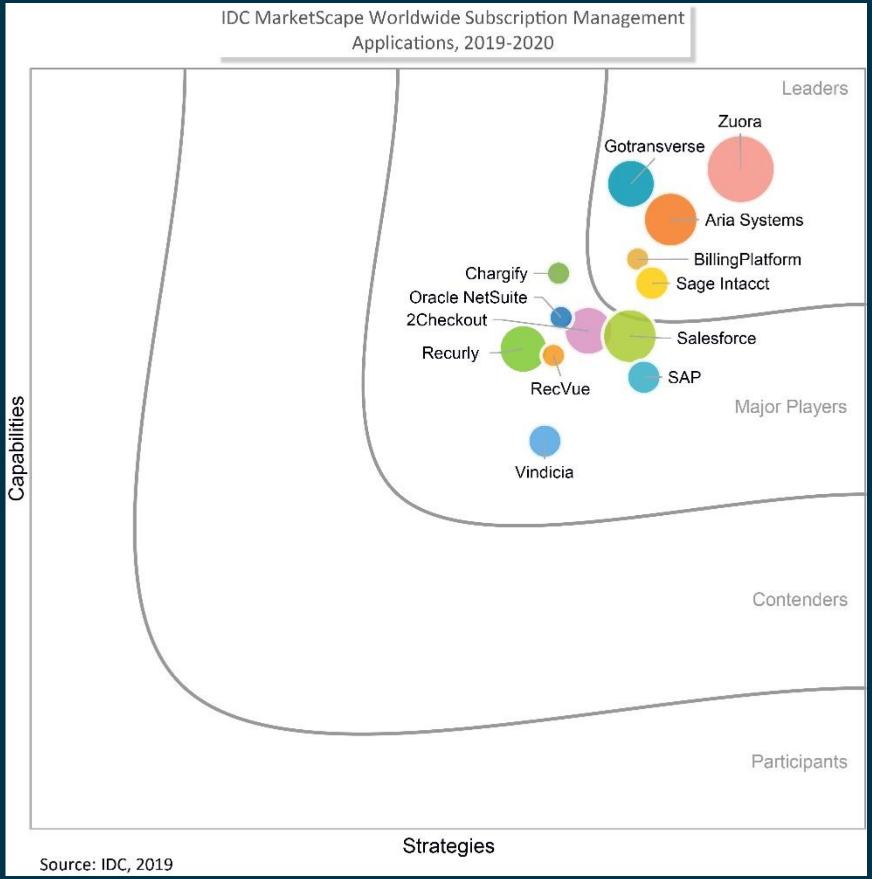
Sage Intacct is Named a Leader in IDC MarketScape: Worldwide Subscription Management Applications



IDC MarketScape Worldwide Subscription Management Applications, 2019-2020

Source: IDC, 2019

[Source: "IDC MarketScape: Worldwide Subscription Management Applications 2019–2020", by Mark Thomason and Jordan Jewell, December 2019, IDC # US44867519]

IDC MarketScape vendor analysis model is designed to provide an overview of the competitive fitness of ICT suppliers in a given market. The research methodology utilizes a rigorous scoring methodology based on both qualitative and quantitative criteria that results in a single graphical illustration of each vendor's position within a given market. The Capabilities score measures vendor product, go-to-market and business execution in the short-term. The Strategy score measures alignment of vendor strategies with customer requirements in a 3-5-year timeframe. Vendor market share is represented by the size of the circles. Vendor year-over-year growth rate relative to the given market is indicated by a plus, neutral or minus next to the vendor name.

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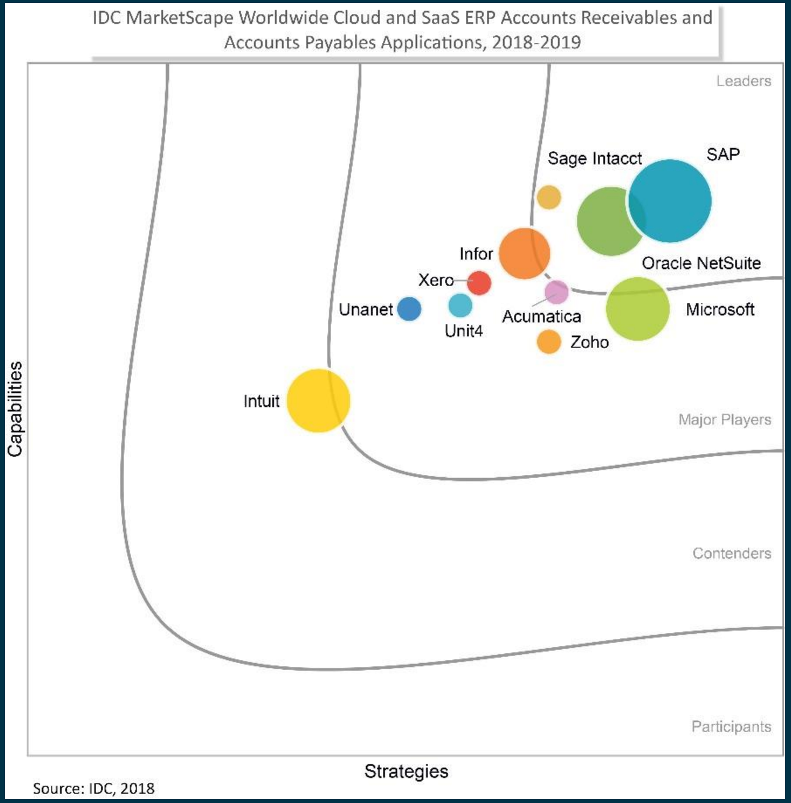
Sage Intacct Named a **Leader** by the IDC MarketScape for Cloud and SaaS ERP Accounts Receivables and Accounts Payables Applications

Source: IDC MarketScape: Worldwide Cloud and SaaS ERP Accounts Receivables and Accounts Payables Applications 2018-2019 Vendor Assessment (doc #US43263618, December 2018)



Source: IDC, 2018

IDC MarketScape vendor analysis model is designed to provide an overview of the competitive fitness of ICT suppliers in a given market. The research methodology utilizes a rigorous scoring methodology based on both qualitative and quantitative criteria that results in a single graphical illustration of each vendor's position within a given market. The Capabilities score measures vendor product, go-to-market and business execution in the short-term. The Strategy score measures alignment of vendor strategies with customer requirements in a 3-5-year timeframe. Vendor market share is represented by the size of the icons.

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Sage Intacct - Transforming midsize companies for faster growth

sage Intacct

UT UNIVERSITY CLINICAL HEALTH
Workiva
TED
THE HUMANE SOCIETY OF THE UNITED STATES
Conrad N. Hilton FOUNDATION
DonorsChoose.org

Jobvite
Khan Academy
Marketo™ An Adobe Company
MEALS ON WHEELS AMERICA
moz://a
NASHVILLE PREDATORS

PHILADELPHIA EAGLES
EST. 1971 POWELL'S CITY of BOOKS
SXSW
bitly
tendergreens
TRUNK CLUB A NORDSTROM COMPANY

Kabbage
madd NO MORE VICTIMS
LEGENDARY
metromile
WISDOMTREE®
planet fitness

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Preferred Provider of Financial Applications

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Back To NFP

Business Central, Enterprise

DYNAMICS 365

Business Central Journey

1987 – Navision Product Released

2002 – Microsoft Acquisition of Navision

2005 – Microsoft Branding change to Microsoft Dynamics NAV

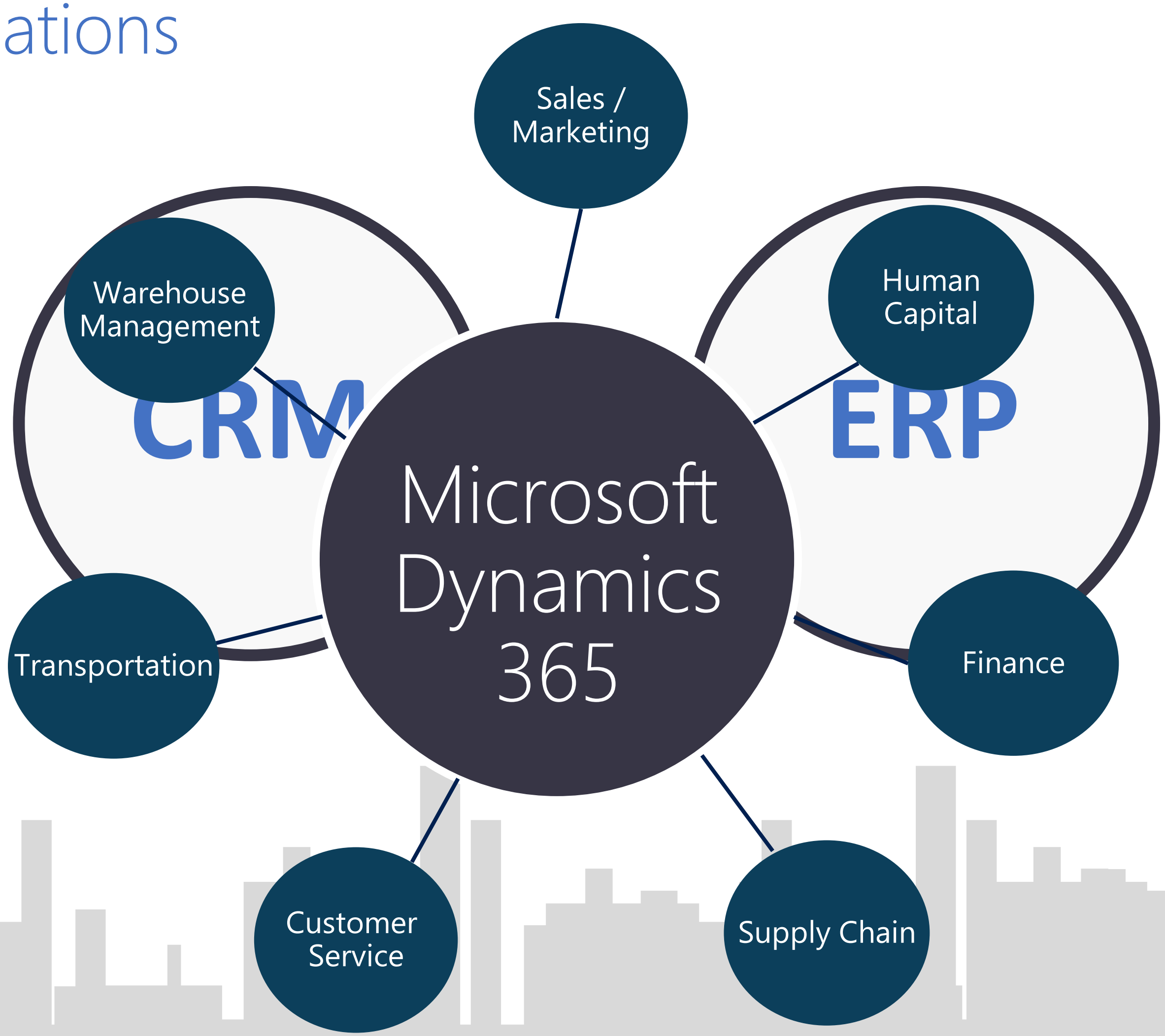
2008 – Introduction of 3 tier architecture and Role Tailored Client

2016 – Release of cloud option now branded Business Central

The Digital World

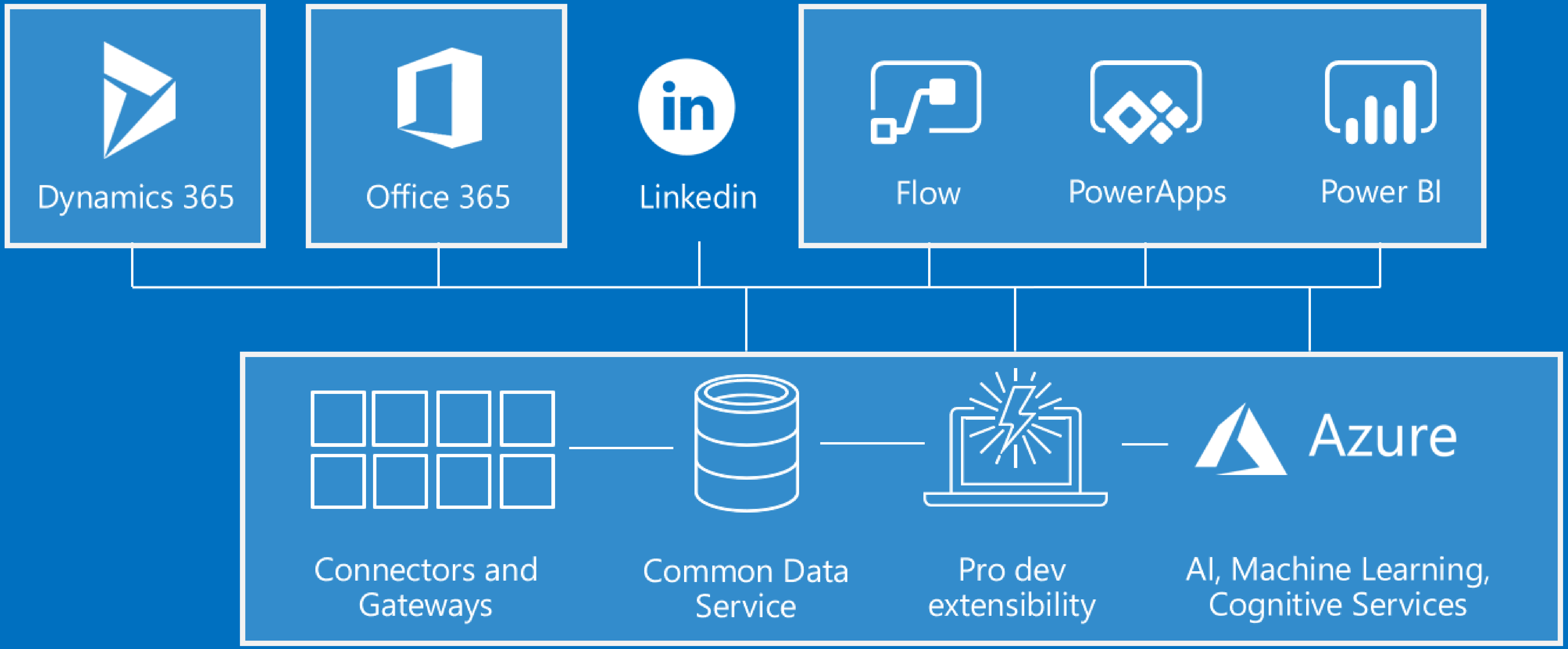
With business applications

Microsoft
Dynamics 365


Sales / Marketing
Warehouse Management
CRM
Human Capital
ERP
Microsoft Dynamics 365
Transportation
Finance
Customer Service
Supply Chain

Microsoft

Intelligent Business Applications platform



Dynamics 365

Office 365

Linkedin

Flow

PowerApps

Power BI

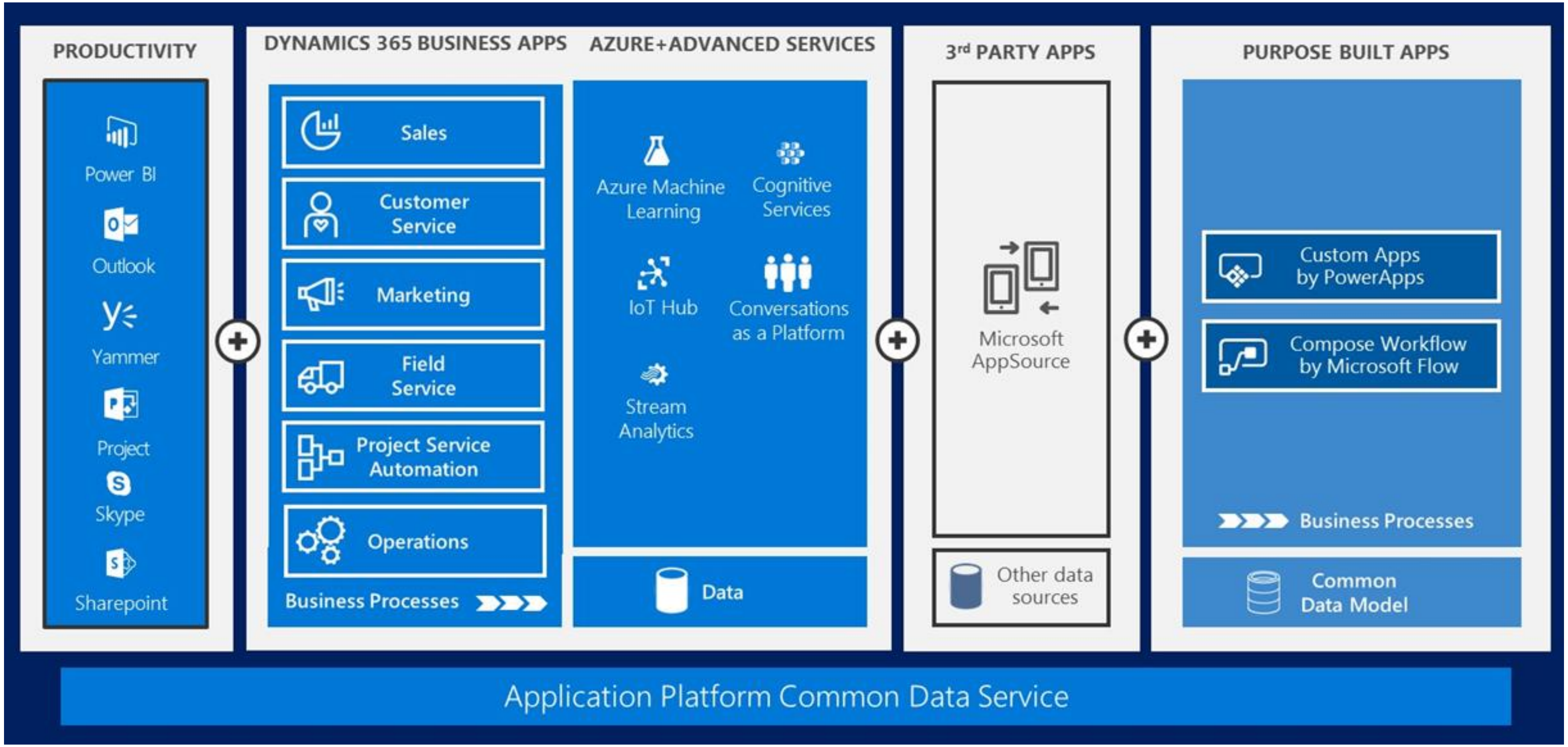
Connectors and Gateways

Common Data Service

Pro dev extensibility

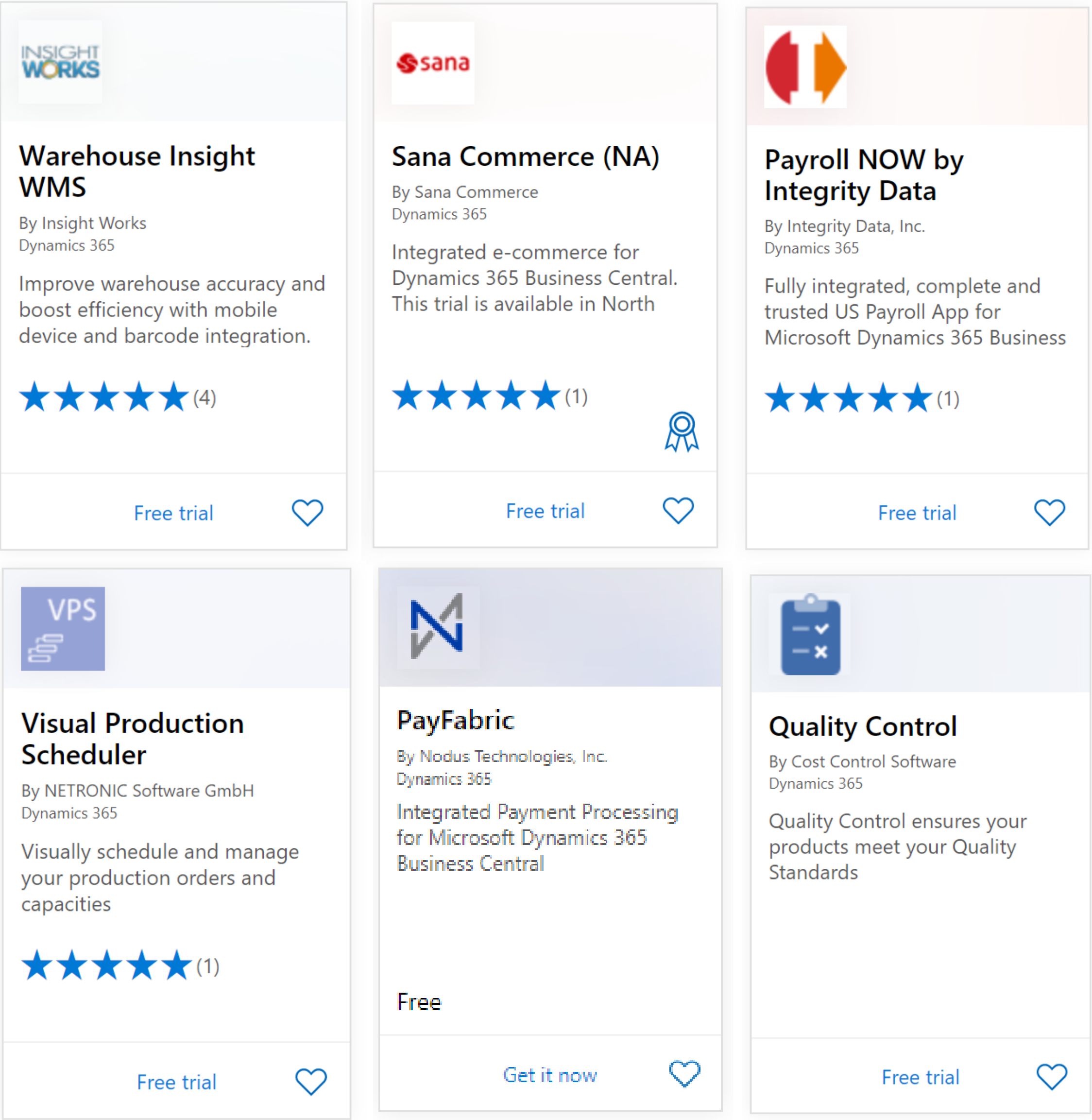
Azure

AI, Machine Learning, Cognitive Services


PRODUCTIVITY
Power BI
Outlook
Yammer
Project
Skype
Sharepoint
DYNAMICS 365 BUSINESS APPS
Sales
Customer Service
Marketing
Field Service
Project Service Automation
Operations
Business Processes
AZURE+ADVANCED SERVICES
Azure Machine Learning
Cognitive Services
IoT Hub
Conversations as a Platform
Stream Analytics
Data
3rd PARTY APPS
Microsoft AppSource
Other data sources
PURPOSE BUILT APPS
Custom Apps by PowerApps
Compose Workflow by Microsoft Flow
Business Processes
Common Data Model
Application Platform Common Data Service

AppSource

- Business Central does a lot
- But it would be unrealistic to expect it to do everything
- There are over 500 apps available on AppSource
- Apps go through a rigorous testing process before being listed



Warehouse Insight WMS
By Insight Works
Dynamics 365
Improve warehouse accuracy and boost efficiency with mobile device and barcode integration.
★★★★★ (4)
Free trial

Sana Commerce (NA)
By Sana Commerce
Dynamics 365
Integrated e-commerce for Dynamics 365 Business Central. This trial is available in North
★★★★★ (1)
Free trial

Payroll NOW by Integrity Data
By Integrity Data, Inc.
Dynamics 365
Fully integrated, complete and trusted US Payroll App for Microsoft Dynamics 365 Business
★★★★★ (1)
Free trial

Visual Production Scheduler
By NETRONIC Software GmbH
Dynamics 365
Visually schedule and manage your production orders and capacities
★★★★★ (1)
Free trial

PayFabric
By Nodus Technologies, Inc.
Dynamics 365
Integrated Payment Processing for Microsoft Dynamics 365 Business Central
Free
Get it now

Quality Control
By Cost Control Software
Dynamics 365
Quality Control ensures your products meet your Quality Standards
Free trial

https://appsource.microsoft.com

Back To Manufacturing

Capable Mid-market Solution

NETSUITE

Why NetSuite?

The first cloud company

ORACLE
NETSUITE
Global Business Unit

Customers in over 203 Countries and Territories

Record Growth

8,000+
Employees globally

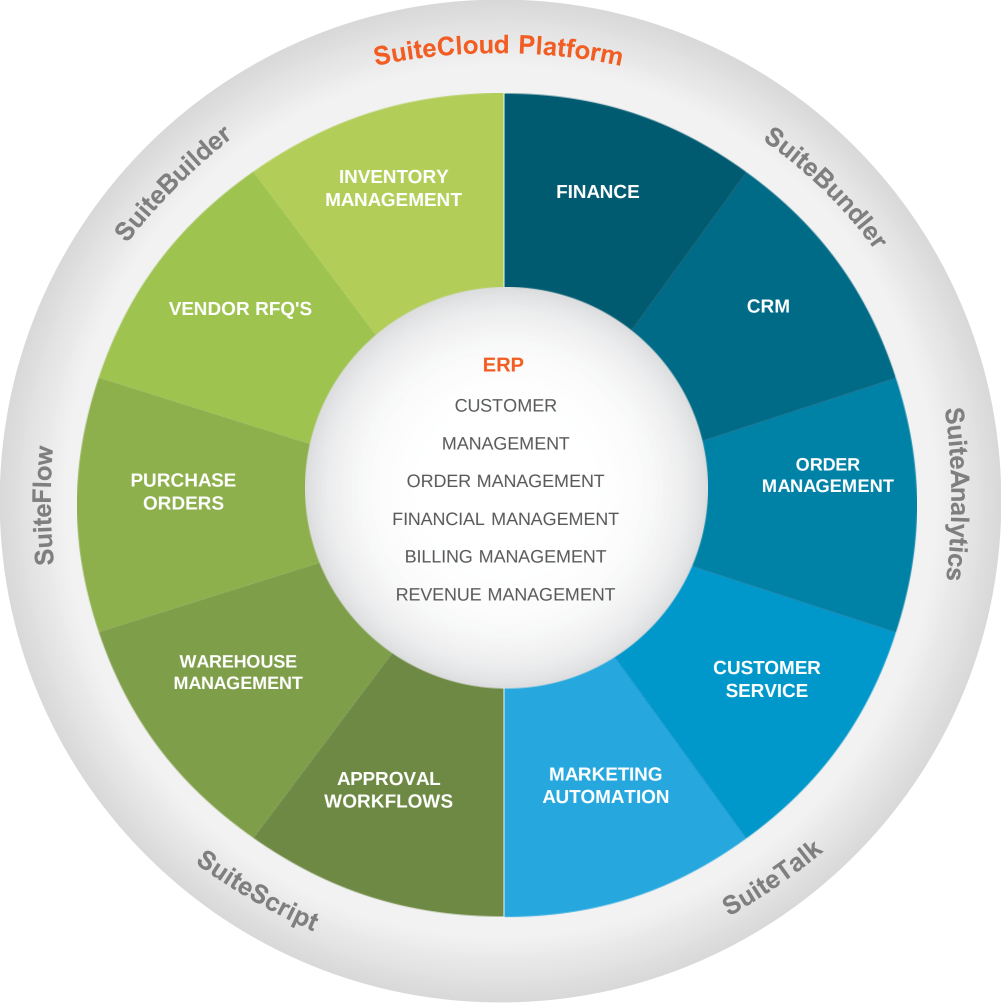
20,000+
Customers worldwide

3,000+
New logos in last 12 months

NetSuite platform

- Oracle NetSuite cloud ERP
  - 20,000+ customers worldwide
  - Serving in over 200+ countries
  - Record growth in 2019
  - 8,000+ staff

- Key Features
  - ▶ Innovative Experiences
  - ▶ 360° Customer View
  - ▶ Intelligent Order Orchestration
  - ▶ Unlimited Expansion
  - ▶ Single Platform



SuiteCloud Platform
SuiteBuilder
SuiteBundler
SuiteAnalytics
SuiteTalk
SuiteScript
SuiteFlow
INVENTORY MANAGEMENT
FINANCE
CRM
ORDER MANAGEMENT
CUSTOMER SERVICE
MARKETING AUTOMATION
APPROVAL WORKFLOWS
WAREHOUSE MANAGEMENT
PURCHASE ORDERS
VENDOR RFQ'S
ERP
CUSTOMER
MANAGEMENT
ORDER MANAGEMENT
FINANCIAL MANAGEMENT
BILLING MANAGEMENT
REVENUE MANAGEMENT

Why Choose NetSuite?

Scalable

Unlimited Subsidiaries
Unlimited Segments
Platform Extensions
Suiteapp.com
Seamless Integration

Multi-tenant Cloud

Automatic Upgrades
Fully Mobile
Safe Customizations
Fast

Data Consolidation

Real-Time Financials
Eliminate Subledgers
No Batch Processing
Ad Hoc Reporting
Drill Down Capability

User-Friendly

Process Automation
Custom Workflows
Personalize
Flexible Reporting
SuiteSuccess

Support

Learning Cloud Pass
24/7 Support
User Groups
SuiteAnswers
Account Manager

NetSuite SuiteCloud

- Flexible, powerful, complete

CAPABILITIES

- **Global** Language Mgt
- **Mobile** Tablets, Watch iOS Android
- **100% Browser** Browser Independent
- **Global Search** Google the Suite
- **Reporting** Create Complex forms & reports
- **Digital Assets** Manage Unstructured Data
- **SuiteSocial** Collaboration Tools

DEVELOPMENT & DEPLOYMENT

- **SuiteConnect** Cloud Data Integration
- **SuiteScript** Programmable Logic & UI
- **SuiteTalk** Cloud App Integration
- **SuiteAnalytics** Built-in Business Intelligence
- **SuiteBuilder** Point-and-Click Customization
- **SuiteFlow** Visual Workflow Implementation
- **SuiteBundler** Cloud Application Distribution

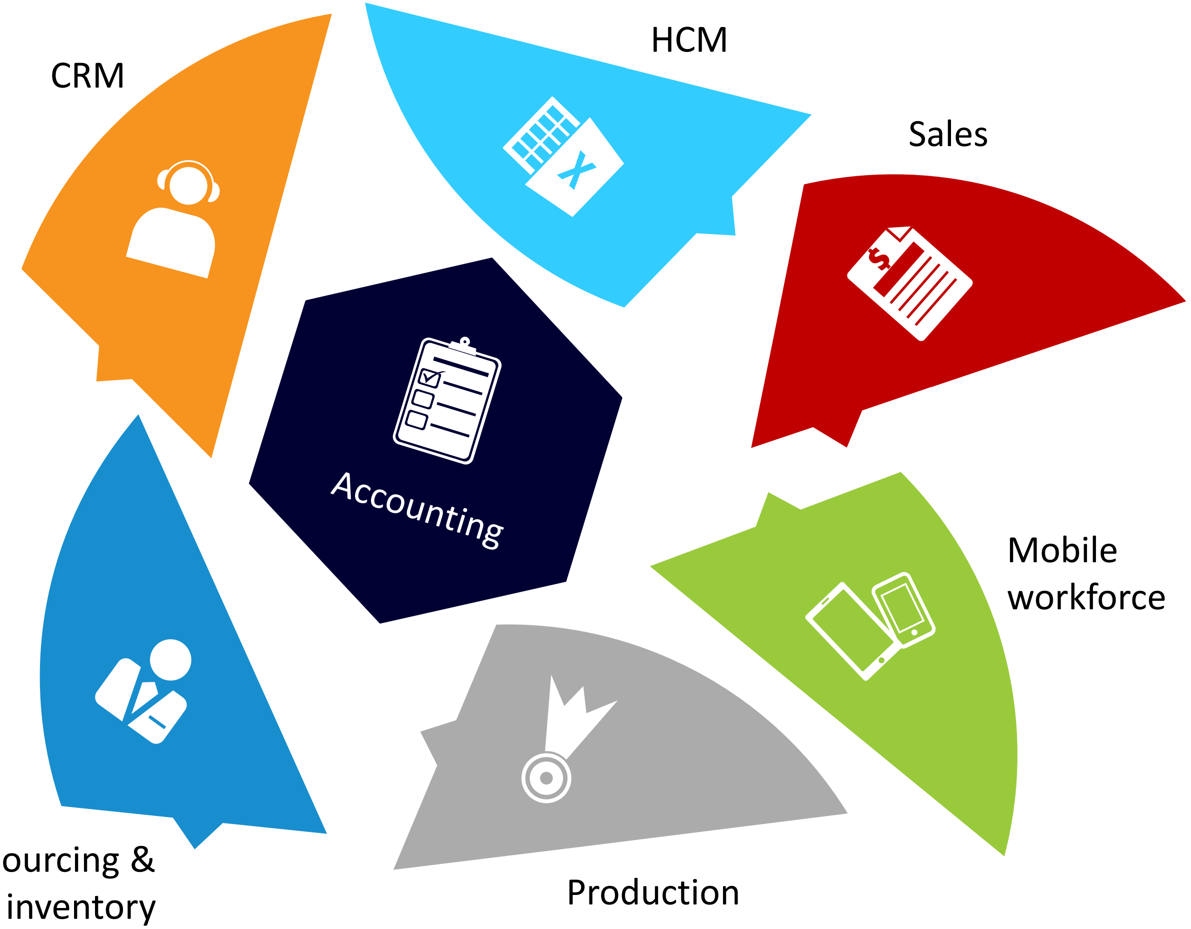
OPERATION

- **Scalability** Enterprise Elastic Capacity
- **Security** SSAE 16 SOC1/ISAE 3402
- **Compliance** Type II PCI DSS SOX
- **Transparency** 24x7 System Status & Ops
- **Assurance** 99.5% Uptime Guarantee
- **Process Tests** Pre- Production Sandbox
- **No Version Lock** Overnight Upgrades

Back To Distribution

Material Originally Presented At Acumatica Summit, Used With Permission

ACUMATICA



CRM

HCM

Sales

Accounting

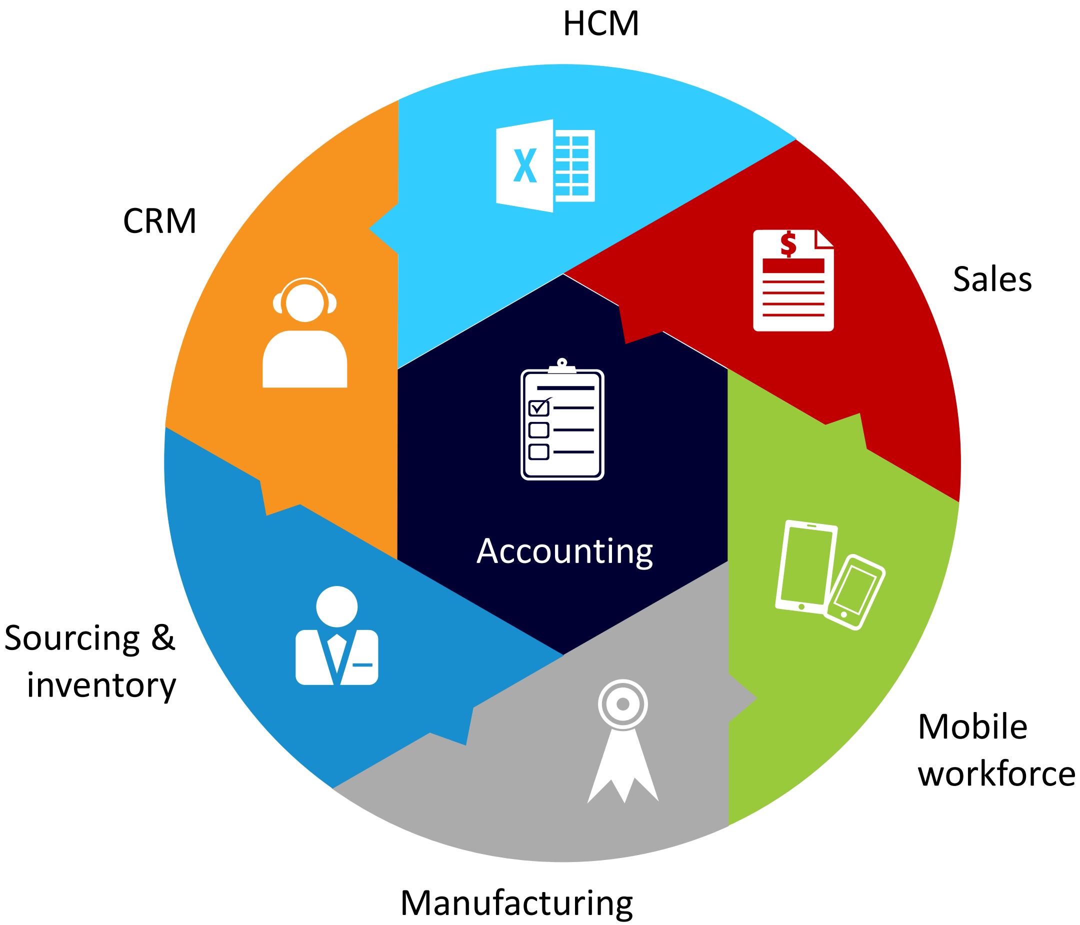
Mobile workforce

Sourcing & inventory

Production

Results in

- Duplicate data entry
- Incorrect information
- Information not shared across departments
- Multiple software products to learn and update, etc..
- Increasing maintenance cost for outdated systems


HCM
CRM
Sales
Accounting
Sourcing & inventory
Mobile workforce
Manufacturing

Benefits

- Instant update across all systems
- Single version of the truth
- Improved productivity of users
- Fewer systems to maintain
- Mobile workforce

Introduction To Acumatica

True cloud & mobile solution

Big bets: HTML 5 & Web Services

BORN IN THE CLOUD

BUSINESS APPLICATION EXPERTS

ERP in our DNA

Specialize in solution for mid-size customers

Acumatica focus on developing & maintaining the product

You choose your local service provider

100% PARTNER CHANNEL

CURRENT "CLOUD DISRUPTION"

Rapid shift to the cloud for business applications

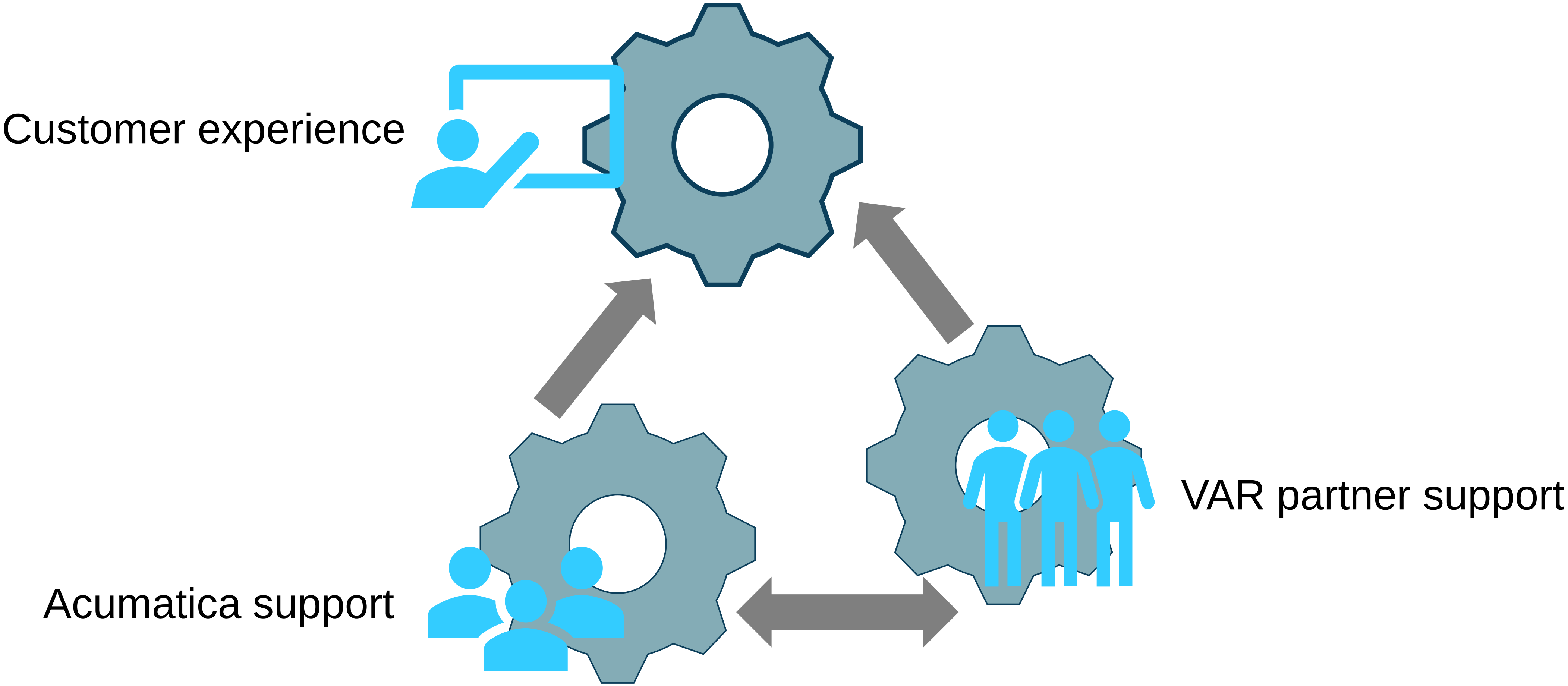
Participate in a Multi-cloud world

Acumatica customer bill of rights

Our customers have a right to:

1. A readily comprehensible and unchanging SaaS end-user license agreement (EULA)
2. A flexible, open platform for rapid integrations
3. Consumption-based licensing that does not inhibit business growth
4. Sustainable pricing with annual increases of no more than 3%
5. ERP implementations without hidden fees
6. Deployment flexibility
7. Access to ***THEIR*** data, anytime
8. Consistent, 24/7 customer service
9. Local business expertise
10. Dual layers of support

Dual layers of support



Customer experience

VAR partner support

Acumatica support

Flexible deployment options

Public cloud

Acumatica Cloud

SaaS offering

Private cloud

Acumatica Cloud
Server and database

Hosting or cloud provider

On-premises

Acumatica Cloud
Server and database

Customer office or datacenter

Acumatica Technology Stack

Connected Applications

- E-COMMERCE
- POINT OF SALES
- SHIPPING & LOGISTICS
- BI TOOLS
- BARCODING

Acumatica Cloud ERP

- FINANCIAL MANAGEMENT
- PROJECT ACCOUNTING
- CUSTOMER MANAGEMENT
- DISTRIBUTION MANAGEMENT

Integrated Vertical Modules

- MANUFACTURING
- HOUSING MANAGEMENT
- GOVERNMENT CONTRACTING
- FIELD SERVICE MANAGEMENT

Acumatica Cloud xRP Platform

- Role Based Security
- Multi-tenanc
- Mobile Framework
- Versioned APIs
- Cross Browser Support
- Development Tools
- Reports Analytics

DB

- SQL Server
- MySQL database

Cloud

- Azure
- IBM
- AWS

DEV

- Visual Studio
- .NET Framework C# and ASP.NET
- HTML 5

Acumatica Customers

Services

- HALL GROUP
- LION GLOBAL INVESTORS
- Doneger
- PRIVATEER HOLDINGS
- coregeomatics
- CSC
- fixnetix A CSC COMPANY
- GUARDIAN COMPLIANCE®
- SEALTECH
- OFSi
- ARC GOVERNMENT SOLUTIONS
- ADITI STAFFING
- CAMP
- M3 Technology Group
- RSM

Wholesale Distribution

- FCP
- POOL SOURCE LLC
- KEMINDO International
- THP GROUP
- National WINE & SPIRITS
- YUASA
- Toffeln Performance Footwear
- KEVINS WORLDWIDE
- Media Solutions
- S&S ACTIVEWEAR
- XBYTE TECHNOLOGIES SERVERS • STORAGE • PARTS
- COTTINGHAM
- Consolidated West Distributing, Inc.
- Youngevity ESSENTIAL LIFE SCIENCES

Manufacturing

- Baccarat
- sciessent
- menck windows
- MITSUBISHI ELECTRIC
- Beiersdorf
- NATURICH LABS INCORPORATED
- SAMSUNG
- iCeutica Making Drugs Better
- PANOVA
- aimtec Your Power Partner
- The Royal Group
- BestBullySticks

Retail/eCommerce

- Tires LES SCHWAB
- SESCO lighting
- SINGAPORE MEIDI-YA SUPERMARKET
- KTA SUPER STORES
- Al Capone ... NO COMMENT
- Wally's
- Boston Pizza
- KFC
- Bookbyte
- bg
- HAND & STONE® MASSAGE AND FACIAL SPA
- Classical Conversations Classical Christian Community

Many More…

- open mobile
- SuperSport World of Champions
- eliminating racism empowering women ywca
- Cesar Chavez Foundation Si Se Puede
- USTA
- Parallels
- Acronis
- traveldoo technologies
- NVS Nebraska Vet Services
- Lake Austin Spa Resort
- SYDELL GROUP
- LAS VEGAS METRO CHAMBER OF COMMERCE
- ERGORESEARCH
- CLEARCHANNEL SATELLITE

Product-Centric Solutions

Wholesale distribution

Manufacturing

Retail

Ecommerce

Automotive

Food & Beverage

Oil & Gas

Service-Centric Solutions

Professional Services

Government | Education

Construction | Real estate

Agriculture | Healthcare

Financial Services

Property Management

Travel & Hospitality

Field Services

Transportation

Energy & Utilities

Non-profit

Productivity Tools

EDI | HR/Payroll

Document Management

Billing | Shipping

Marketing Automation

Budgeting

Expenses | VAT/Taxes

Electronic Signature

Business Intelligence Tools

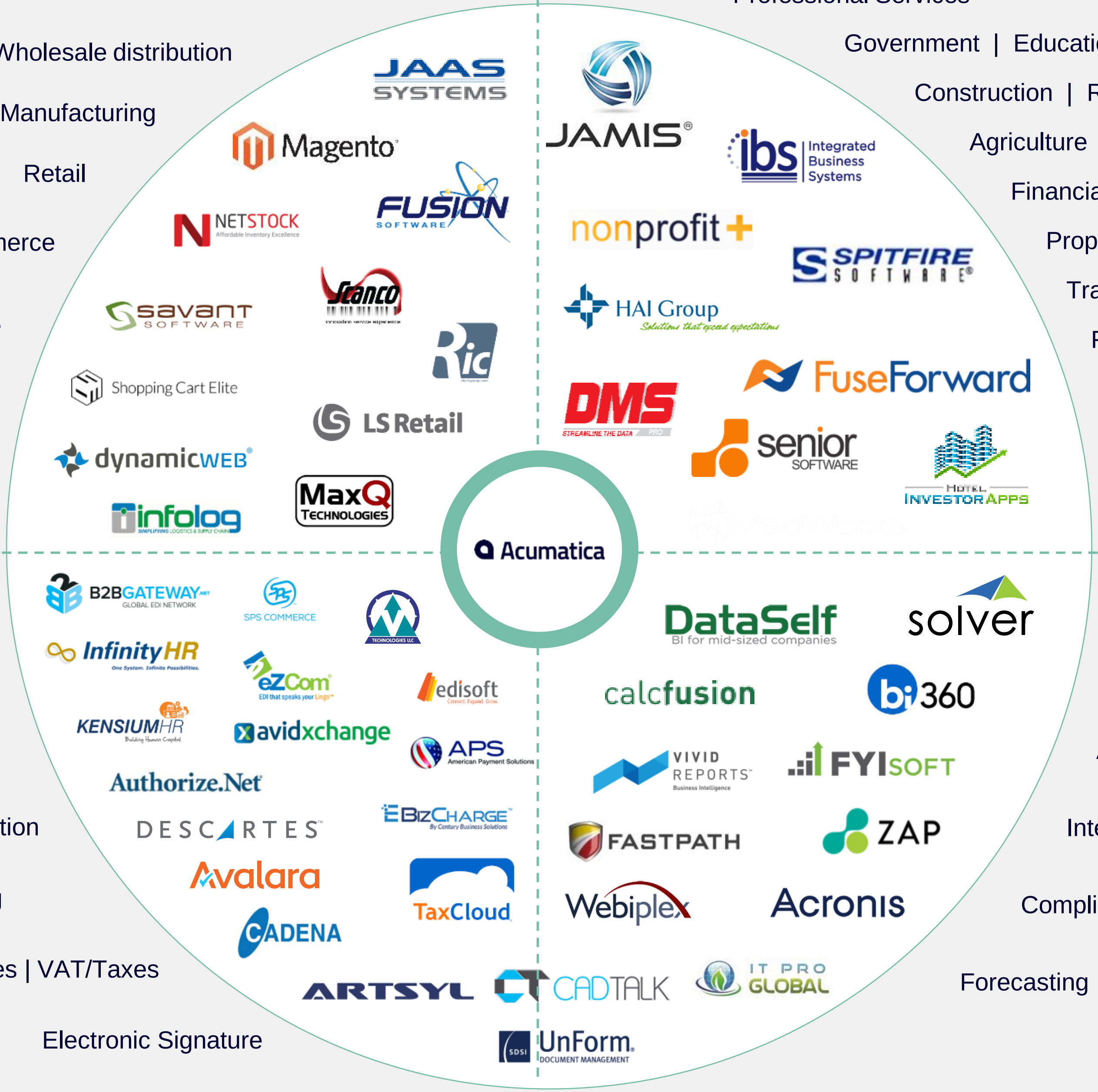
BI & Reporting

Analytics

Integration

Compliance

Forecasting


Acumatica
JAAS SYSTEMS
Magento
FUSION SOFTWARE
NETSTOCK
Scanco
savant SOFTWARE
Ric
Shopping Cart Elite
LS Retail
dynamicweb
MaxQ Technologies
infolog
JAMIS
ibs Integrated Business Systems
nonprofit+
SPITFIRE SOFTWARE
HAI Group
DMS
FuseForward
senior SOFTWARE
Hotel InvestorApps
B2BGATEWAY GLOBAL EDI NETWORK
SPS COMMERCE
TECHNOLOGIES LLC
InfinityHR
eZCom
edisoft
KENSIUMHR
avidxchange
APS American Payment Solutions
Authorize.Net
EBizCharge
DESCARTES
Avalara
TaxCloud
CADENA
ARTSYL
CADTALK
UnForm DOCUMENT MANAGEMENT
DataSelf BI for mid-sized companies
solver
calcfusion
bi360
VIVID REPORTS
FYISOFT
FASTPATH
ZAP
Webiplex
Acronis
IT PRO GLOBAL

System Integrators

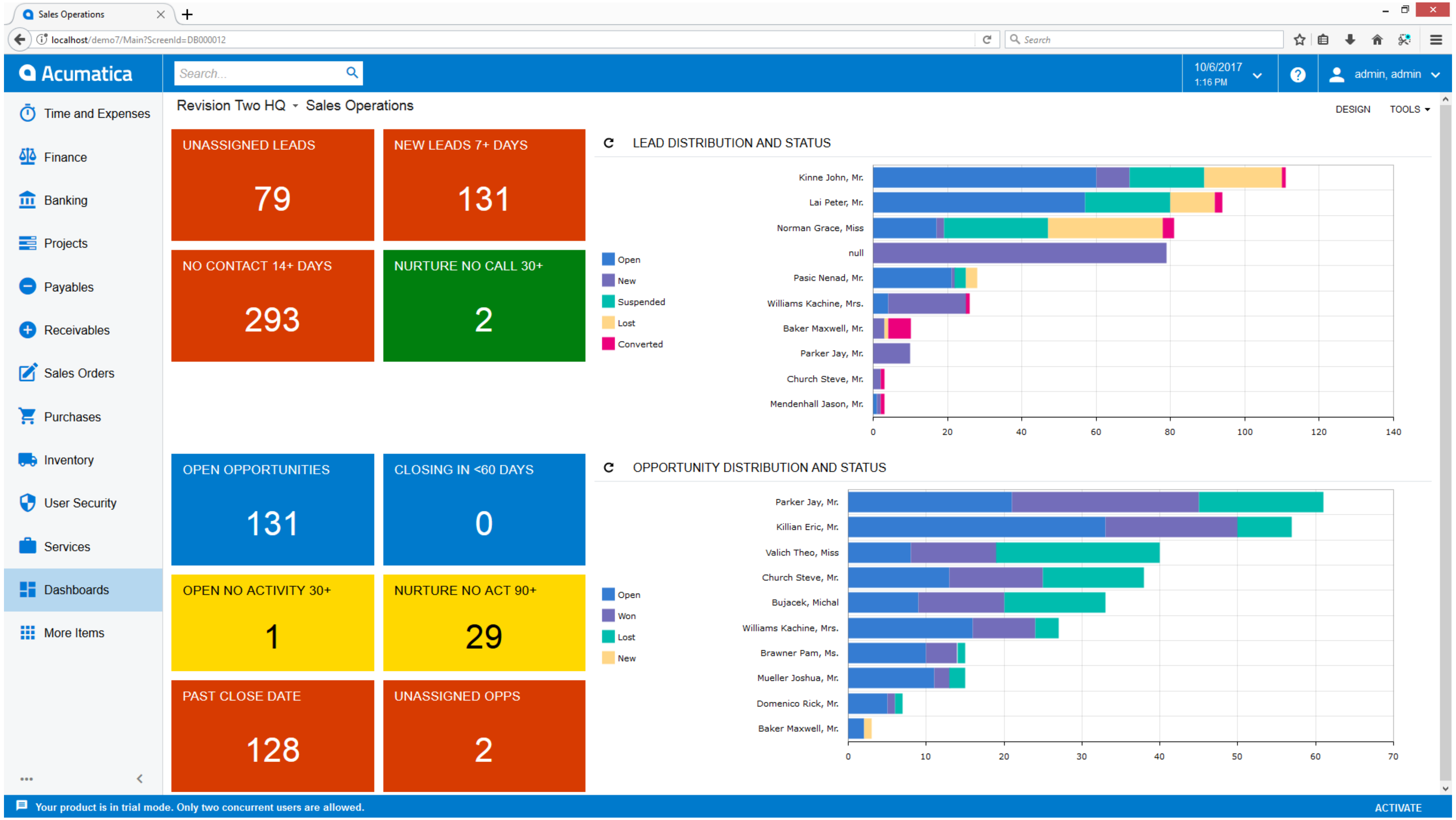
KENSIUM

itransition

SkyKnack

K2 Enterprises

Product Look And Feel


Sales Operations
localhost/demo7/Main?ScreenId=DB000012
Search
Acumatica
Search...
10/6/2017
1:16 PM
admin, admin
Revision Two HQ
Sales Operations
DESIGN
TOOLS
Time and Expenses
Finance
Banking
Projects
Payables
Receivables
Sales Orders
Purchases
Inventory
User Security
Services
Dashboards
More Items
LEAD DISTRIBUTION AND STATUS
Open
New
Suspended
Lost
Converted
Kinne John, Mr.
Lai Peter, Mr.
Norman Grace, Miss
null
Pasic Nenad, Mr.
Williams Kachine, Mrs.
Baker Maxwell, Mr.
Parker Jay, Mr.
Church Steve, Mr.
Mendenhall Jason, Mr.
0
20
40
60
80
100
120
140
OPPORTUNITY DISTRIBUTION AND STATUS
Open
Won
Lost
New
Parker Jay, Mr.
Killian Eric, Mr.
Valich Theo, Miss
Church Steve, Mr.
Bujacek, Michal
Williams Kachine, Mrs.
Brawner Pam, Ms.
Mueller Joshua, Mr.
Domenico Rick, Mr.
Baker Maxwell, Mr.
0
10
20
30
40
50
60
70
ACTIVATE

UNASSIGNED LEADS 79	NEW LEADS 7+ DAYS 131
NO CONTACT 14+ DAYS 293	NURTURE NO CALL 30+ 2
OPEN OPPORTUNITIES 131	CLOSING IN <60 DAYS 0
OPEN NO ACTIVITY 30+ 1	NURTURE NO ACT 90+ 29
PAST CLOSE DATE 128	UNASSIGNED OPPS 2

Your product is in trial mode. Only two concurrent users are allowed.

Acumatica - Pricing

- Pricing is based on capabilities needed and not user count
- A base installation of Acumatica Financials, Advanced Edition, which would support up to around 25 users, would come in around $1,100 per month ($14,000/yr.)
  - Implementation is usually 100% of software purchase costs
- Add-on modules available for an extra charge include CRM, wholesale distribution, manufacturing, field service management, project accounting, and fixed assets
- 100% of sales are made through channel partners or OEM relationships (white label)

Back To Manufacturing