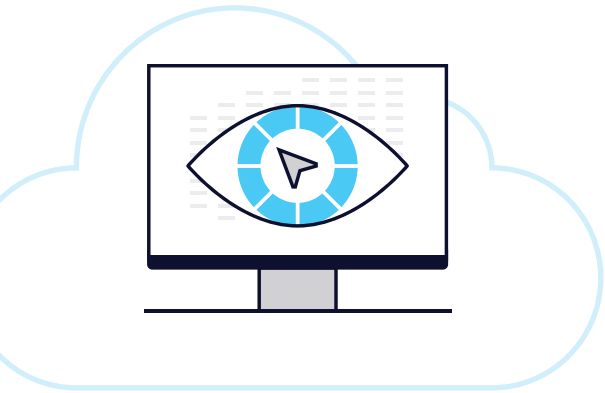
Acumatica's ERP Adoption Playbook for CTOs and CIOs

A Guide with Eight Steps for Success

1. Choosing your Deployment Option
2. Assembling your Team
3. Defining your Requirements
4. Developing a Project Plan
5. Developing a Data Migration Plan
6. Developing a Test Plan
7. Developing a Training Plan
8. Planning for Go-Live Day

Acumatica
The Cloud ERP



ERP systems can transform your organization's financial and operational health by optimizing daily operations across all business lines. That's why they play an integral role in your IT infrastructure.

Adopting a cloud ERP system requires major investments in time, effort, and attention. Getting management buy-in before you start will help you manage leadership expectations and garner the support you need to obtain the necessary staffing resources.

Remember adopting a new ERP entails much more than simply installing and maintaining another software application. Since ERP systems change how organizations conduct business, they warrant widespread leadership buy-in. Lack of senior-level buy-in causes many promising initiatives to falter, according to industry research.

The new platform will affect every aspect of your company, from regulatory compliance to operations to information security. It will also keep records of financial performance for upper management and auditors.

Your new Acumatica ERP solution will also touch virtually every department and hold the attention of your leadership team throughout the adoption process. For such a high-profile project, you should make sure you and your IT staff are well prepared with a solid plan of action.

We want your adoption to go as smoothly as possible so you can start realizing benefits right away. This playbook will help you walk through the essential steps you need to take and how your team can engage with your Acumatica partner to best prepare for and execute your new ERP.

Congratulations! You're off to a great start by choosing Acumatica!

Your business stakeholders chose Acumatica for the excellent benefits it provides your company. Now it's time to focus on IT's perspective. Before we begin with the steps for a successful adoption, let's review the reasons why Acumatica represents an excellent choice for your IT department:

A future-proof platform

Acumatica is built on a modern platform designed to facilitate rapid integration with new technologies. Acumatica features low-code and no-code options for customizing the application, plus full support of standard Microsoft development tools and open APIs for more complex customizations and integrations.

A solution that fits every need

Acumatica is a complete business management solution that features core financials and reporting tools, plus customizable dashboards and drag-and-drop automation. You can add functionality as you need it. Acumatica also offers industry editions for Manufacturing, Distribution, Construction, Commerce, General Business with embedded Customer Relationship Management (CRM), and more.

Customer-friendly business practices (for a change!)

Licensed by the data resources you need, not the number of users, Acumatica allows unlimited, role-based user licensing. This ensures everyone will have access to the information they need when they need it. No more department silos and no more hassles when adding user licenses.

Anytime, anywhere access with any device

Being able to access every function through mobile responsive screens allows all users to work from anywhere. Acumatica also comes with a native mobile app for iOS and Android for even more flexibility in the field.

Access to data when you want it

Your data is always secure and always in your hands; you can do a fully relational database export at any time—even if you're going to take it somewhere else!

Expert support from start to finish

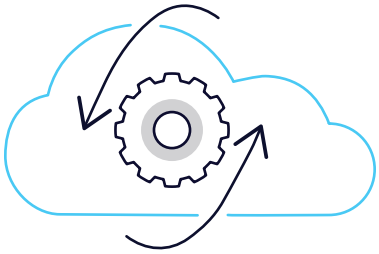
Well-qualified Acumatica partners who have the expertise and industry knowledge to ensure a successful adoption will be there with you every step of the way.

"We didn't want separate applications; we wanted all functions in one system. Most of the others required integrations. We wanted something real-time and all connected. Acumatica checked off all the boxes."

Brian Rowerdink, Controller, Security Solutions

Step 1: Choosing your Deployment Option

Change is inevitable. Companies want technology that can change to meet their evolving needs. Therefore, many organizations appreciate the deployment flexibility Acumatica offers. You can choose to install Acumatica in the cloud (Software-as-a-Service, or SaaS) or a private cloud. No matter which option you choose, you get the same great ERP software—and can change your deployment option when your business needs change.



The choice of deployment is an important decision. We encourage you to discuss your requirements with your Acumatica partner to ensure you select the deployment model that best suits your needs and consider the pros and cons of each.

Cloud (SaaS) Deployment

Cloud (SaaS) Deployment means a remote hosting provider hosts the software on computers they own and maintain. The hosting provider manages all software updates as well as updates to computer hardware and operating systems. Acumatica uses AWS as our hosting site where the Acumatica SaaS team maintains and updates Acumatica ERP software and operation system updates.

Pros:

- There is no up-front capital expenditure, freeing up cash for other investments.
- Servers are maintained in a controlled environment in the data center, making technical resources available for more critical duties.
- Software updates can be scheduled automatically without involvement from IT.
- Acumatica's recommended hosting providers employ enterprise-level security and virus protection that most companies can't afford. They also offer geographically dispersed data centers, backup/restore capabilities, and system redundancy.
- SaaS deployments offer flexible scalability. Pay only for the resources you use; add or remove resources, as needed.

Cons:

- Loss of internet connectivity can leave users unable to access the system.

Private Cloud Deployment

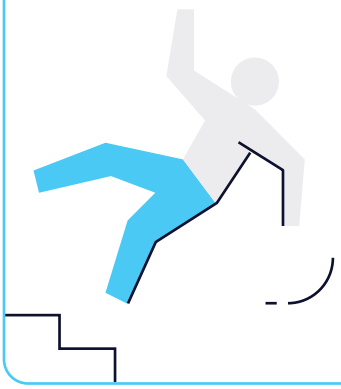
Private Cloud Deployment means you purchase the computers that will run Acumatica's cloud ERP software. You will store the computers in your facility or work with a hosting partner to manage and maintain your hardware in their remote facility or data center.

Pros:

- Companies choose to deploy on-premises for several reasons, such as regulatory compliance.
- Private deployment gives you complete control of and access to the system.

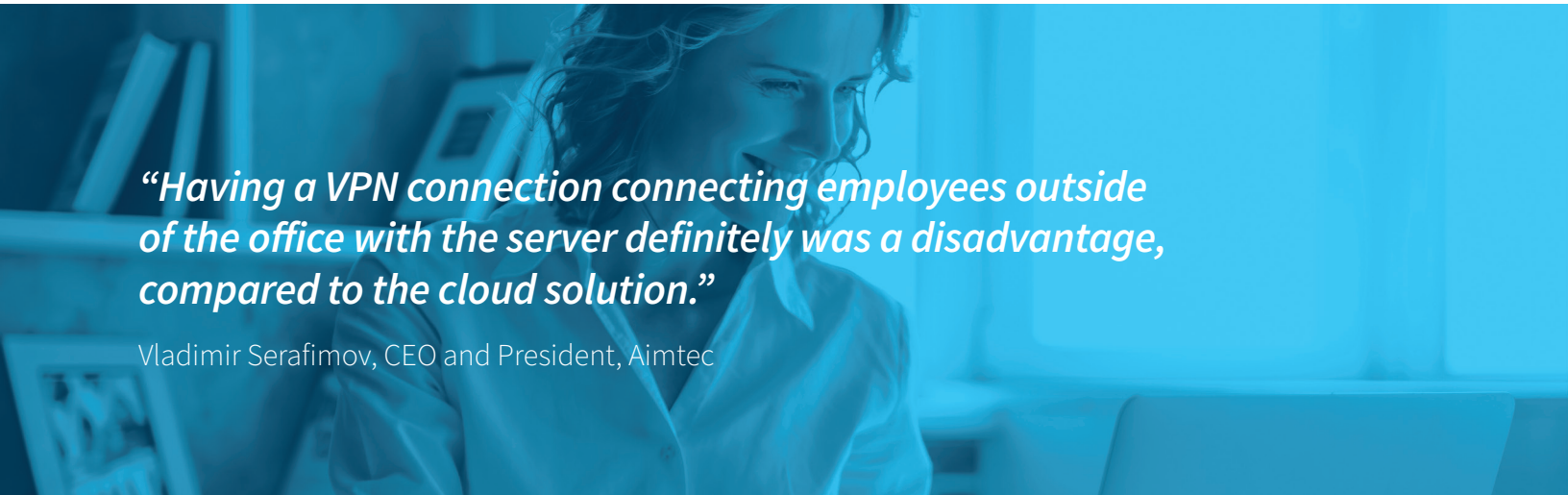
Cons:

- Private cloud deployment requires more upfront capital investment to purchase the server hardware as well as the staff and facilities to maintain them.
- You are responsible for all network security and access risks, including backup/restore procedures and system failover capabilities.
- You are responsible for making sure upgrades take place as new releases become available. You can perform upgrade tasks using your team or work with your Acumatica partner for assistance.



Potential Pitfall: Don't assume private on-prem is more secure than the cloud.

Many businesses believe that having their company's financial data in the cloud presents more of a security risk than having it hosted on premises. It's important to note that having your financial data in the cloud is not "riskier" than having it under your control in a private cloud deployment. Third-party cloud providers are able to offer a high-level of security that you may not be able to afford on your own.

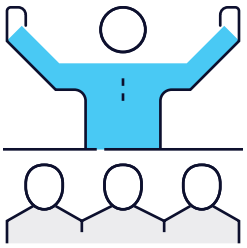


"Having a VPN connection connecting employees outside of the office with the server definitely was a disadvantage, compared to the cloud solution."

Vladimir Serafimov, CEO and President, Aimtec

Step 2: Assembling your Team

Implementing an ERP system or switching to a new one takes time and effort. You must transfer data, revise business processes, and establish new workflows all while conducting normal business operations. To help ensure smooth adoption, you should assemble an internal team dedicated to the adoption process, including some full-time members and other part-time contributors who will step in key points during the project. Your team should include:



Executive Sponsor, also known as the Champion

ERP projects require executive sponsorship within your organization to keep the project aligned with organization strategy, communicate goals to the organization, overcome barriers, and provide ongoing direction to the project team to guarantee successful completion of the project. Your executive sponsor will join the process at the beginning and stay involved throughout the project lifecycle.

Project Lead (project manager)

The project lead is responsible for coordinating your company's resources dedicated to the adoption effort and establishing the project plan for the company resources. The project lead is responsible for holding regular meetings with the partner and team members to assess progress, identify problems, and communicate the project status regularly with the company's leadership team and the project's executive sponsor.

Technical Lead (technical/business analyst)

The technical lead creates detailed documentation of the required customizations, reports, and integrations. The lead documents custom-developed functionality that aligns with documentation standards and best practices; supports data migration and security activities.

In Private Cloud deployments, you may have dedicated technical resources to manage the infrastructure. This person or team will procure hardware and software installation and networking components and also maintain test and production environments with upgrades when needed.

Subject Matter Experts

Your team will require staff members who have specialized skills for part or all of the project schedule. These people, known as subject matter experts (SMEs) have specialized skills or knowledge of your company's business requirements. Technical SMEs include system administrators, database administrators, network engineers, and software developers. Functional SMEs are needed to help define user access roles, rights, and privileges, determine segregation of duties, or establish audit requirements. You might choose to hire outside contractors for specialized knowledge if you do not have access to these individuals within your company, which is often called business process outsourcing (BPO).

Department Representatives

The adoption effort will also require the involvement of team members from various departments within your organization (for example, finance, IT, production, warehouse, and sales). These departmental team members are brought in as needed to help document the existing business processes, define system requirements, or participate in testing.

Be sure to ask department managers to assign a representative to your team. That way, each department will have a voice in defining the project requirements and participating in testing.

Figure 1 shows an example project team structure that includes your team members (the client) and your partner's team members.

Pro Tip: Choose team members based on their competencies, not on their job title.

As you move deeper into the project, you will need to rely on people with the best knowledge of your company's processes and needs—regardless of whether they are managers.

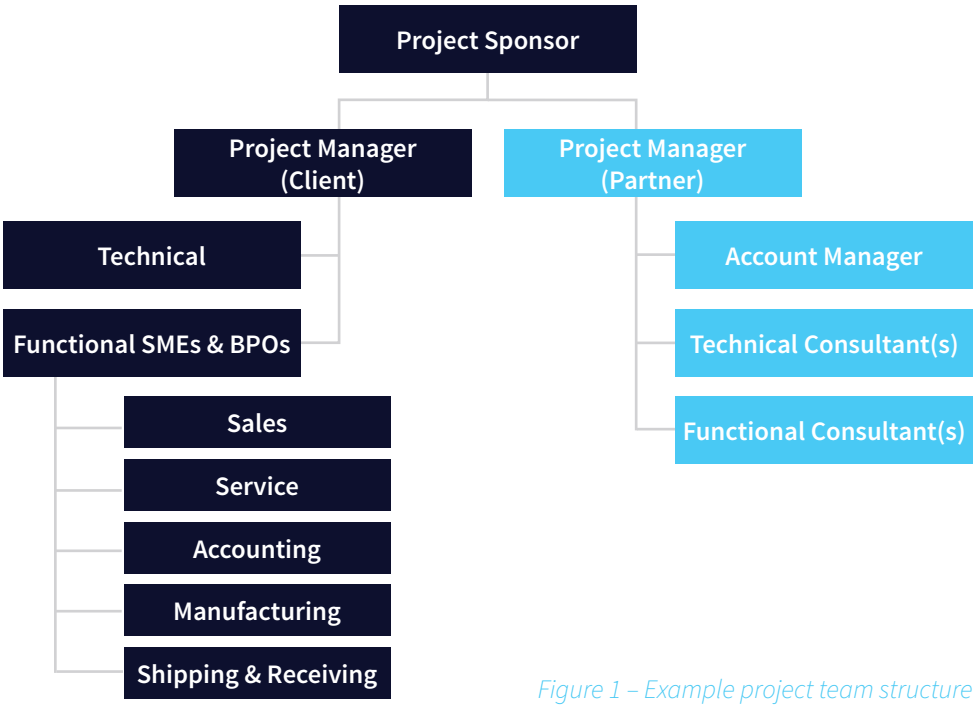
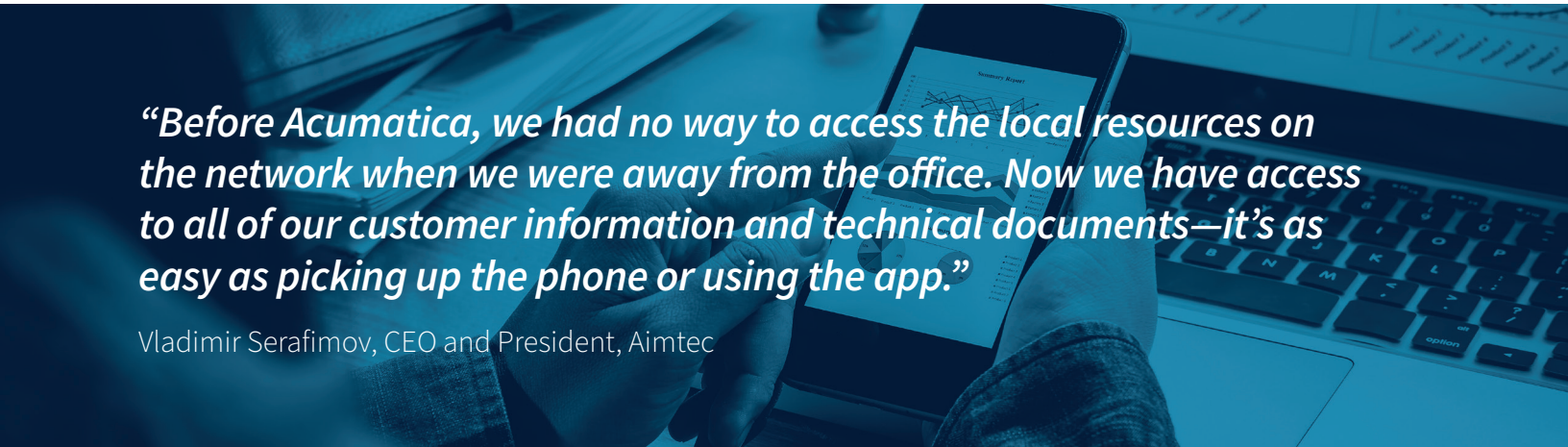


Figure 1 – Example project team structure

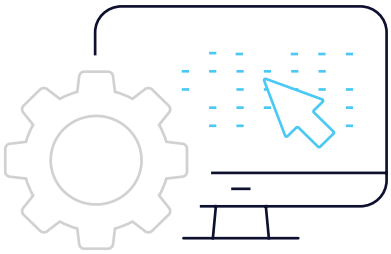


"Before Acumatica, we had no way to access the local resources on the network when we were away from the office. Now we have access to all of our customer information and technical documents—it's as easy as picking up the phone or using the app."

Vladimir Serafimov, CEO and President, Aimtec

Step 3: Defining your Requirements

You've assembled your team. Now it's time to identify functional gaps in your current system and processes and then define the required functions of your new Acumatica system. You and your team should review all business processes for improvements and how you want the new ERP system to function.



These requirements generally fall into four areas:

- **Essential:** Features or functions that are essential for the company to operate.
- **Desirable:** If possible, these functions would enhance the usefulness of the new system.
- **Not an immediate need:** Functions that are not required at this time but will be necessary soon, depending on the company's growth and advances in technology.
- **Nice to have:** Non-essential functions that would make work easier.

Start by having your team focus on essential functionality, and then consider whether other functions can be included within the project's budget and timeframe. At the end of the process, you will have a list of the features and functions your company will expect to have upon project completion.

There are many ways to document requirements. Table 1 – Example Requirements Definition, shows an example of how the requirements can be defined.

Make sure to briefly document your rationale for each listed requirement. Doing so will enable stakeholders and leaders to quickly grasp the importance of each requirement. Remember to keep it simple since unnecessary details can complicate your explanation.

Requirement Number	Need	Function	Requirement	Metric	Notes
1.1	Essential	Accounts Payable – Multiple currencies	Accounts Payable must accept invoices in a foreign currency—specifically, conversion between US dollars and Mexican peso. Conversion rates must reflect the exchange rate at the time of the transaction.	Must process at least 3,000 transactions per day	May need to support conversion between US dollars and British Pounds within the next year.

Table 1 – Example Requirements Definition

Checklist: Documenting your ERP requirements

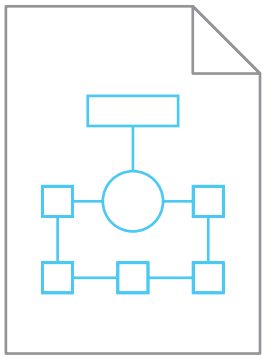
To help get you started, work through this checklist of essential requirements with your project team and document the requirements for your new ERP. Identify which items are essential, desirable, not an immediate need, or just nice to have; add more if you need them. Explain the requirements in a way someone outside your industry can understand them. Avoid getting lost in unnecessary details.

- ☐ Existing or new customizations, workflows, and metrics that are expected to be included in the ERP
- ☐ Required integrations from the ERP to third-party business systems
- ☐ System and data handling requirements, including database backup and restore, system failover capabilities, network access, and security requirements
- ☐ Functionality gaps in the current system and processes that must be included in the new ERP system
- ☐ Accounting functionality requirements (such as Accounts Payable/Receivable, General Ledger, Chart of Accounts, Multiple Companies/Branches, Multi-Currency, Project Accounting, and Payroll Management)
- ☐ Industry-specific functionality requirements:
  - ☐ Manufacturing (Scheduling, Bill of Materials, Routing, MRP)
  - ☐ Distribution (Warehouse Management, Bin Location, Kitting, Batch/Serial Number Tracking, EDI, Multiple Units of Measure)
  - ☐ CRM functionality requirements (Marketing Automation, Email Integration, Case Management, Customer Portal)
  - ☐ eCommerce integration (B2C, B2B, Marketplaces)
- ☐ Reporting requirements (Customized Reporting, KPIs, Dashboards, Queries, Business Intelligence Capabilities)
- ☐ User roles, responsibilities, auditability, compliance, and governance
- ☐ Training requirements for users and administrators
- ☐ Support needs after adoption
- ☐ Scalability and additional functionality requirements for expected future growth
- ☐ Mobility requirements

"We've significantly lowered our tech costs because Acumatica charges based on consumption rather than per-user license, and we don't have to worry about adding users because it's not a huge cost at all."

Dave Munson, Founder and CEO, Saddleback Leather

Step 4: Developing a Project Plan



Once you have established the project requirements, the next step is developing a project plan to ensure the project will meet each requirement and stay within schedule and budget. Before you start developing the project plan, it's important to loop in others since this is not a task that should be done in a vacuum. You should involve implementation team members and a representation of employees who will use the ERP system. Doing so will solidify their support and provide the organizational buy-in you need for a smooth implementation.

Take the time to think through each phase of the project with your team members. They understand their areas of the organization and can add value.

The project plan outlines assumptions and projected costs, along with project milestones, with tangible goals to ensure there are no surprises along the way. Part of the plan will be to identify potential risks to a successful project completion and develop a response to mitigate each of those risks.

Potential Pitfall: Avoid scope creep!

While developing your project plan, watch out for potential pitfalls, such as scope creep. Scope creep can derail your Acumatica adoption project by continually expanding your requirements while the system adoption is in progress. Stay focused on your requirements. Any requests for changes, including those that will impact the project timeline and budget, should be communicated to your team and approved by management before including them in our project plan accordingly.

An issue may trigger a scope change if it:

- → Causes an impact to the project delivery dates (for example, a request for additional modules)
- → Requires a change to the project deliverables
- → Requires a change in the project resources
- → Requires a significant change in the sequencing of tasks as defined in the project plan

Another critical part of the project plan is integrating with or otherwise addressing functions provided by third-party or customized applications. We will discuss this later in this document but be sure your project plan includes the functions these applications provide as well as the data they require.

In addition to the steps you and your team outline in the project plan, your Acumatica partner will manage the following:

- **Discovery and Planning** – Your Acumatica partner will work with your team to document your needs and plan the adoption process.
- **Analysis and Design** – Your partner will analyze your needs and design a system configuration. The design will include any system customizations or additional components needed for the project.
- **Build** – The elements of the new system are put in place and tested.
- **Stabilize** – The system is stabilized to ensure end-to-end connectivity of all components.
- **Deploy and Go Live** – Your Acumatica system is activated in production.
- **Post Go-Live** – Your Acumatica partner will ensure there are no problems after going live and will resolve any outstanding issues that might arise.
- **Continuous Improvement** – Your Acumatica system will constantly be evaluated to ensure your business is fully leveraging it to increase efficiency and get the most out of the system.

A high-level view of a typical Acumatica project plan will follow the steps shown in Figure 2 – Example Acumatica Project Schedule.

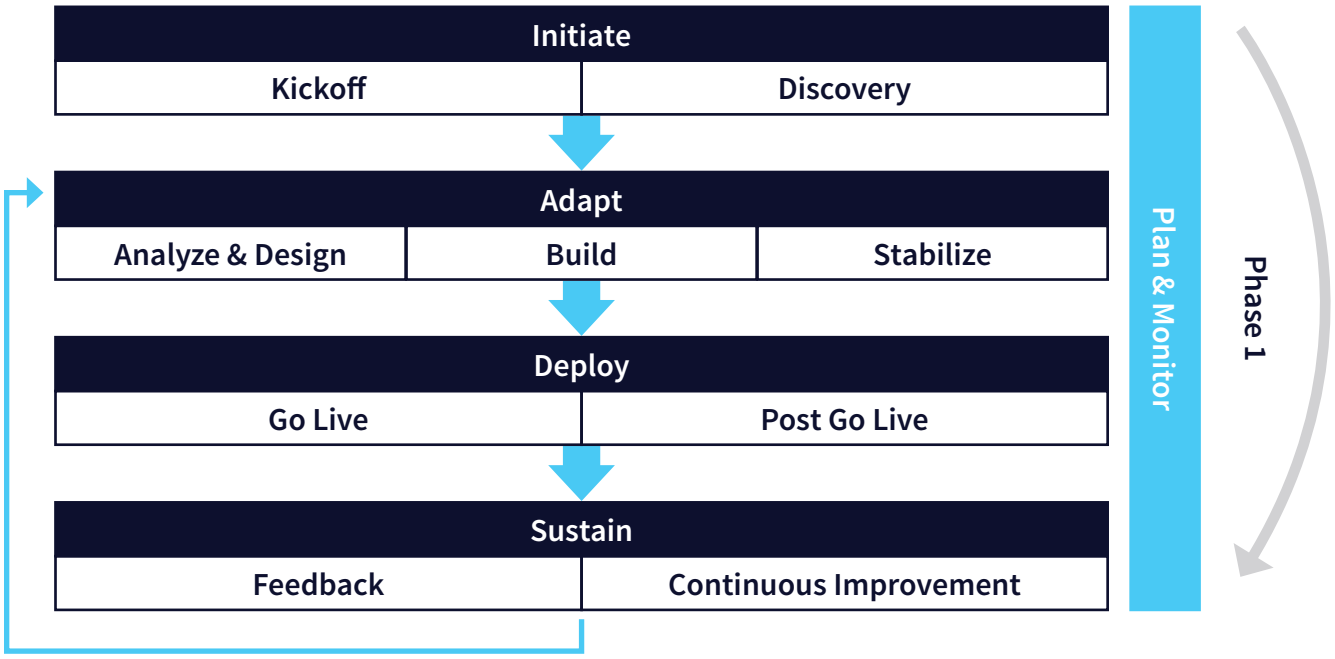


Figure 2 – Example Acumatica project schedule

NOTE: The project plan can be developed alongside the test plan; however, the project plan will include time for completing the tests outlined in the test plan along with enough time for rework and retesting.

Keep these points in mind:

- Make sure key personnel and systems within the organization will be available at critical times for discovery, training, and testing.
- Schedule enough time for testing and rework.
- Be sure to include training in your project plan for the key users of your new Acumatica system.
- Establish a process for change requests and trouble escalation procedures.

Different people in your company require different levels of access. Your Acumatica partner will work with your team to define user roles and access rights to ensure each user role has the appropriate level of access to perform their jobs. This process includes defining Segregation of Duties, Sarbanes-Oxley requirements, and other legal and regulatory responsibilities.

Potential Pitfall: Don't forget about security!

Security is a crucial part of any system that houses financial data and helps you manage your finances. Make sure security is part of your project plan, allowing for time to set things up correctly. Acumatica offers many levels of security to ensure your data is safe from external—and internal—threats.

"We needed one connected system to manage our entire organization. We now have full visibility of what's happening out in the field at any point in time."

Todd Snyder, President & CEO, C&O Nursery

Step 5: Developing a Data Migration Plan

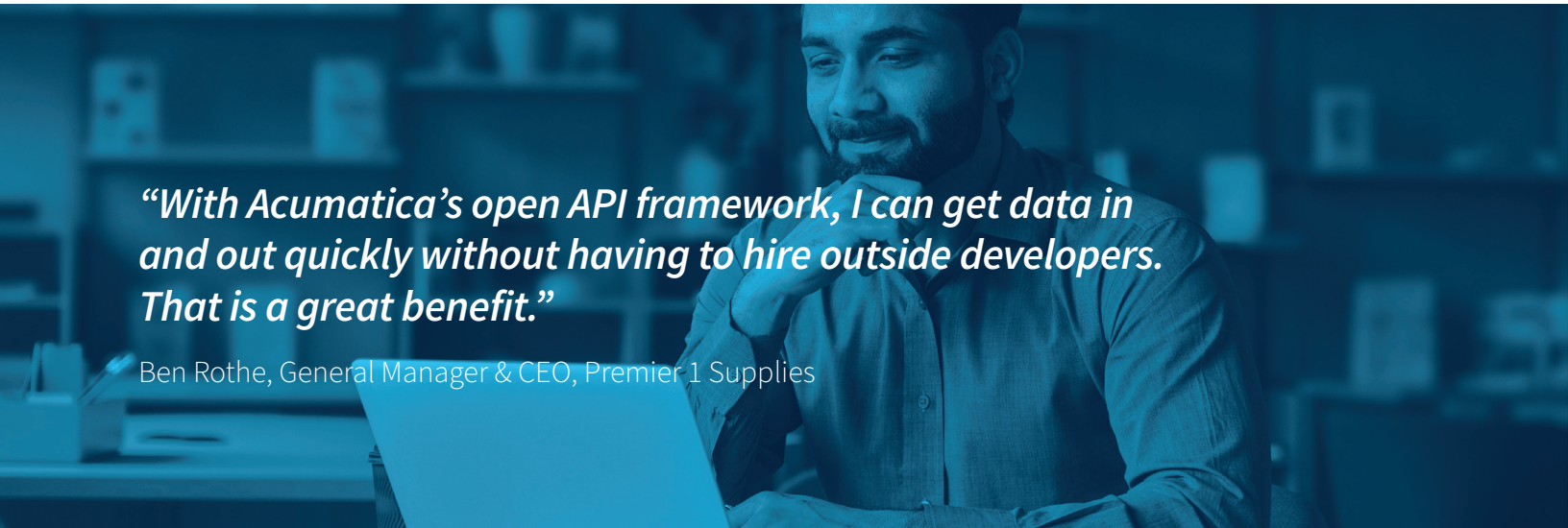
Switching from legacy or multiple, disparate systems to a comprehensive cloud-based ERP solution is a complicated and extensive procedure. Migrating data is an essential part of a successful transition. The data migration plan is technically part of the project plan. We decided to make it a separate step due to its critical nature and complexity. This step defines the data migration plan and orders the tasks involved in preparing and migrating data from your old system (or systems) to your new ERP solution. Key tasks include:

- → Extracting and cleaning the data by eliminating redundant or erroneous data, such as duplicate contact lists or contact information for people no longer with the company.
- → Reformatting the data to fit the new database schema and structure.

Be sure to include input from your internal team members, who can advise on the essential data elements from their respective departments, such as finance, sales and marketing, warehouse, field services, and shipping and receiving.

Checklist: Data migration

- ☐ Ensure all existing customer contact information is accurate and up to date.
- ☐ Remove incorrect or redundant data (discontinued vendors, contacts no longer with the company).
- ☐ Remove incorrect or out-of-date company data (old part numbers, discontinued products).
- ☐ Set up your Acumatica database.
- ☐ Map your legacy ERP data to the new Acumatica database fields.
- ☐ Transfer the data to the new system.
- ☐ Test the system to verify all legacy data has been moved and is accessible.
- ☐ Verify new data can be added to the system (new product information, inventory item location, new customer information).



"With Acumatica's open API framework, I can get data in and out quickly without having to hire outside developers. That is a great benefit."

Ben Rothe, General Manager & CEO, Premier 1 Supplies

Step 6: Developing a Test Plan

Once all parties approve the requirements document, your team should develop a user acceptance test plan. This test plan answers the key question: "How will we know the new system meets our requirements?"

Successful completion of the test plan verifies that the system and the project can both be accepted.

During this step, you will rely on your team members and subject matter experts. Take each requirement in your requirements document and define a test to demonstrate that the new system meets that functional specification.

Some of the tests in the plan may be simple and straightforward while others will be complex. You may even need multiple tests to determine if a single requirement has been met.

Regardless, each test in the test plan will have the following components:

- **Objective:** A brief statement on the purpose of the test.
- **Requirement:** The specific requirement or requirements the test will address. Be sure tests include the functions of additional modules, customizations, or system modifications.
- **Setup:** The system configurations required to conduct the test.
- **Procedure:** The step-by-step process for conducting the test. If certain test metrics are required, such as load testing, make sure you have the tools in place to measure the test results.
- **Test data:** If necessary—a subject matter expert can produce this. Be sure the test data represents real-world situations.
- **Expected result:** Identify the results the test should produce if the system performs according to the requirements.
- **Pass/Fail:** Determines whether the test was completed successfully.
- **Comments:** Adds any observations on the system's behavior or partial success.

Successfully completing the test plan verifies the system and project can be accepted. However, it does not mean it is time to go live at least, not yet.

"While our competition struggles to adapt, our team has been able to work anywhere and maintain business continuity under any scenario because we're running on Acumatica in the Cloud."

Seth Bray, Chief Executive Officer, PennAir

Step 7: Developing a Training Plan

Too often, companies make the costly mistake of failing to create and implement a comprehensive training plan. Rather they give training too little attention or none at all, which can derail system adoption. Training your staff is an important step to maximizing Acumatica's benefits. Training not only helps users become more productive immediately but also encourages faster overall adoption and removes the temptation to fall back into old, inefficient processes.

Separate training into two components: Subject Matter Experts (SME) Training and User Training.

SME Training – Include members of the core project team, superusers, and system administrators. SMEs must know their subject area well enough to train users training and serve as the go-to person pre and post-go-live.

User Training – All users will need the training to learn how to effectively perform their roles. Users will include members of your financial team as well as members of sales and marketing, field services, warehouse, shipping and receiving, and any other department that will use the system. If the new system will introduce new company procedures, make sure to incorporate these changes into the training.

Training your team on how to use the system from the get-go will set you and your team up for unqualified success. Training every employee, from the top down, will yield many benefits, including increased productivity and user buy-in, as old inefficient processes become obsolete.

Pro Tip: Establish standard training procedures for all new employees.

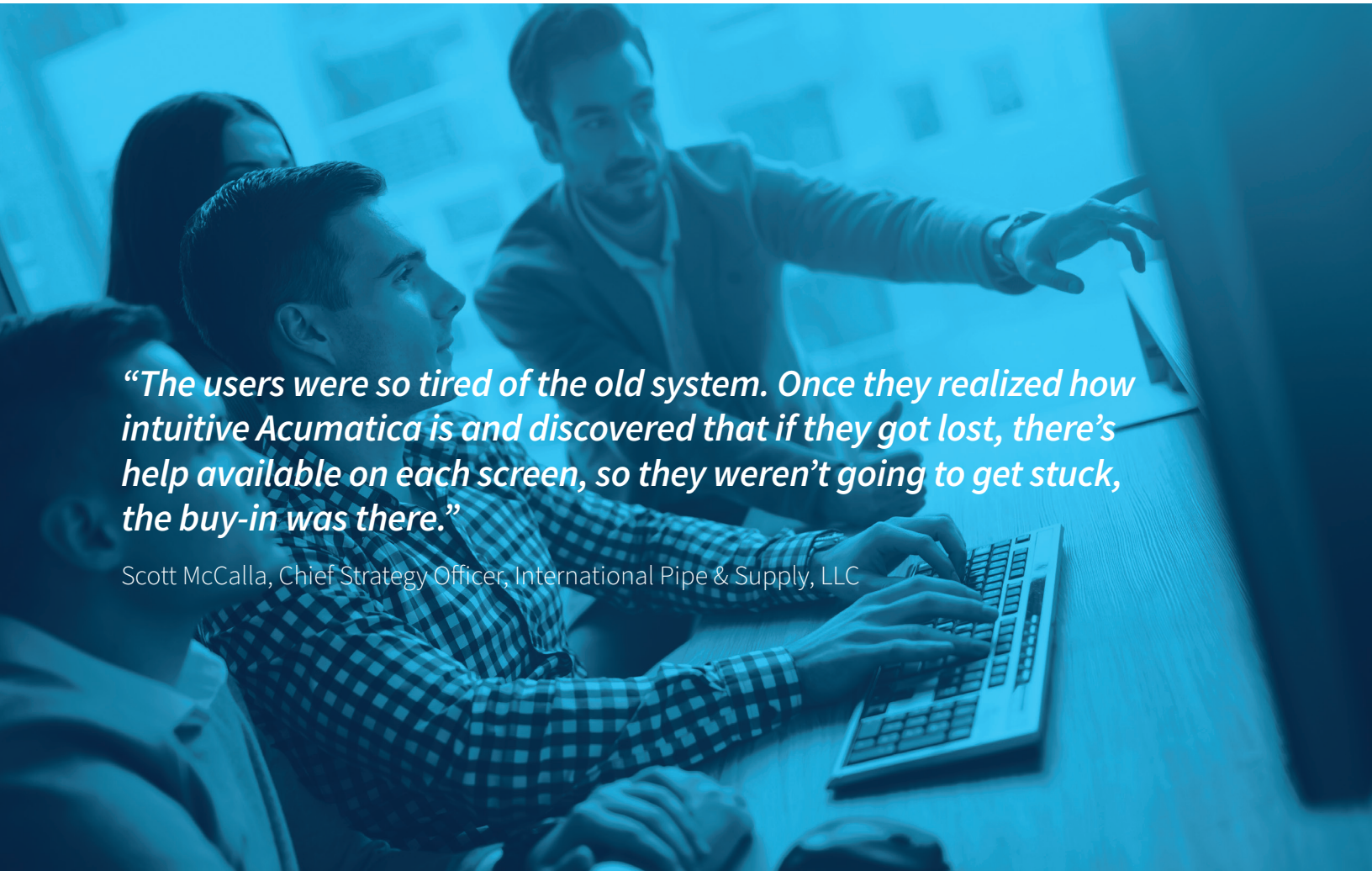
User training should be standardized for onboarding new employees or training employees who are promoted into new roles.

Acumatica customers do not embark on this journey alone. An Acumatica partner will provide direction and answer questions. The partner will emphasize the importance of implementing standardized user training plans and rolling them out to new employees and employees who assume new roles. Therefore, everyone operates from the same common framework. In addition to partner support, customers can get free training from Acumatica online university.

- Acumatica provides free online training at Acumatica's Open University, which offers in-depth courses covering all of Acumatica's capabilities and modules.
- All Acumatica documentation is free and available online.
- Acumatica comes with a built-in User Guide for self-paced learning.

With Acumatica, every person will have access to a single source of truth from any location and at any time. The system rests upon Acumatica's flexible, open platform and allows seamless integration with third-party applications. Information is synchronized between every department and business application, taking decision making based on incomplete, outdated data to decision making based on real-time, accurate data.

No matter what your learning style, Acumatica has training options for all users.

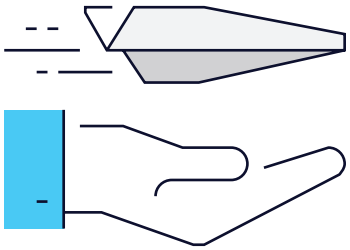


"The users were so tired of the old system. Once they realized how intuitive Acumatica is and discovered that if they got lost, there's help available on each screen, so they weren't going to get stuck, the buy-in was there."

Scott McCalla, Chief Strategy Officer, International Pipe & Supply, LLC

Step 8: Planning for Go-Live Day!

Everything you've been doing until now has been leading up to the big day when you move from the old system to "go live" on your new Acumatica system. An essential part of your overall plan is how you plan to go live. Most companies schedule their go lives during a time that will have the least impact on the business—typically over a weekend.



There are generally three approaches to go live on a new system:

Approach	Pros	Cons
Big bang: The new system is activated and used exclusively going forward. The old system is deactivated and used for archival information.	→ In this model, cut over happens once. → Everyone in the company is running on the new Acumatica system. → Removes the temptation to revert to the old system.	→ There can be a risk if the new system is not configured correctly since the old system is no longer available. → A failure in system performance in one area may affect other areas of the business. → It takes longer to recognize the benefits of the Acumatica system causing implementation fatigue.
Phased approach: The new system is activated in phases to minimize disruptions in operations. Phases can be broken down by module, geographical area, or business unit.	→ There are multiple go-live dates, but each phase is smaller, less complicated, and less risky than a "big bang" approach. → If there are any migration issues, they can be handled one at a time before beginning the next phase. → This model delivers faster time to value (TTV) and faster time to productivity (TTP).	→ In this model there are multiple cut overs. → This approach will require coordination when deciding which modules to activate next. → The integration of elements of the new system and legacy system working together can be complex during this transition phase. Temporary interfaces between the two systems can add more time and cost.
Parallel operation: Both the legacy and new systems run at the same time. Users learn the new system while simultaneously working on the old one.	→ This option is the lowest-risk scenario since there is never a chance of losing data during the change. → Users can get familiar with the new ERP system before migrating to it, without interruption to the business.	→ This method will take the most time and effort of the three approaches. → There is a possibility that users will not want to adopt the new system because they still have access to the old one. → Results in duplication of effort as users must enter data in both systems.

There is no single approach that works best for every company. Your Acumatica partner can help your team decide the best go-live option for your company's unique requirements.

Figure 3 shows an example of a phased implementation plan by modules.

Modules	Go-Live Date	
Financials	Legacy System	4/1
Sales (CRM)	Legacy System	5/1
Distribution	Legacy System	7/1
Manufacturing	Legacy System	10/1

Figure 3 – Example of a Phased Implementation Plan by Modules

Checklist: Elements for Go Live

Here are important elements to have in place when you go live:

- ☐ Execute and pass all user acceptance tests on the test system.
- ☐ Complete user and administration training.
- ☐ Ensure financial data is up to date (general ledger balances, open AP and AR transactions, inventory is accurate) and ready for go-live.
- ☐ Establish a backup plan in the event the go-live is not successful.
- ☐ Decide on the approach for adopting the new system (big bang, phased, parallel, hybrid).
- ☐ Document the roles and responsibilities of your team members during the go-live process.
- ☐ Make sure essential systems and personnel on your team (and from elsewhere, if needed) will be available for go-live.
- ☐ Practice the data migration and cutover activities on a pre-production system.
- ☐ Ensure the production data and systems are ready for go-live.
- ☐ Define the criteria and timeline for discontinuing the use of the former ERP system.
- ☐ Re-run your user acceptance tests in the production environment and ensure all tests pass before cutover.

"Almost every other ERP software company charges monthly per user, which inevitably has executives trying to limit how many people really need simultaneous access. Acumatica's novel way of charging based on transactions is well-suited for future growth."

Eric Mizrahi, Director of Operations & IT, Global Beauty Care

Other considerations to discuss with your Acumatica partner

Third-party and custom applications: Will you still need them?

Some departments require specialized software for their work. Acumatica's open Application Programming Interface (API) makes it easy to integrate the ERP solution with most third-party software packages.

However, before moving everything over to the new solution, you should ask yourself if you will still need all the third-party or custom applications you currently use when the new Acumatica ERP is up and running? Some needs may remain the same, but many will not. Organizations often bought or developed third-party and custom applications because their old ERP system could not handle the demands they needed to address.

Therefore, you should review all your integration requirements with your Acumatica partner to see if you can fulfill the need with Acumatica. If not, the partner can let you know whether Acumatica offers the software integrations you need or whether a suitable replacement is available from one of our Independent Software Vendor (ISV) partners.

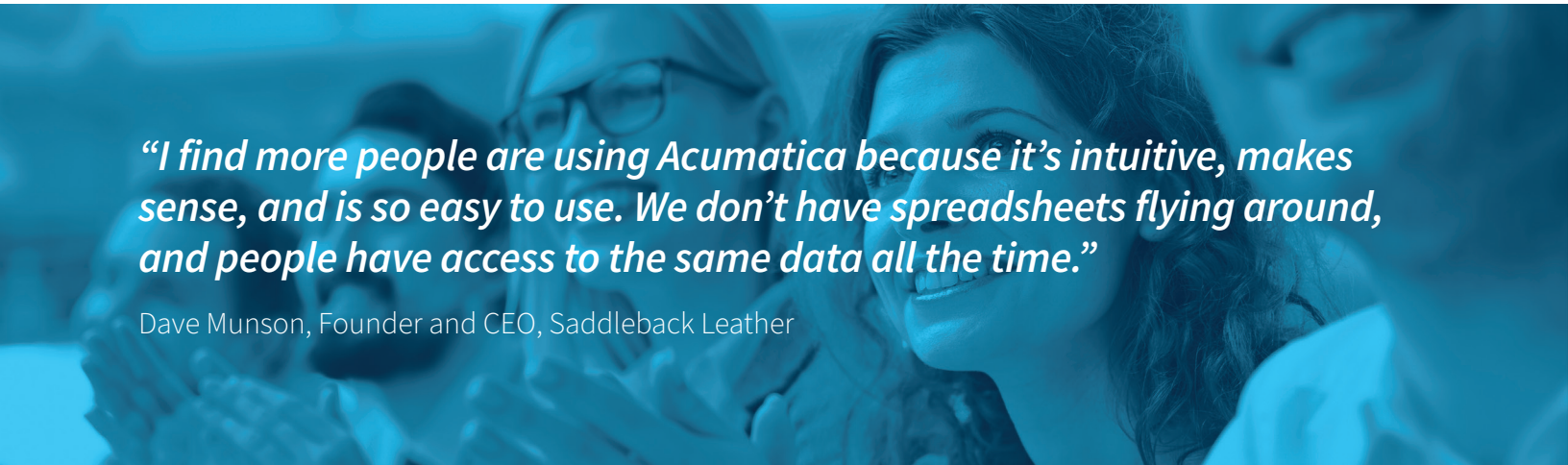
Are your business processes still on track?

Many companies that migrated off older accounting or ERP systems continued to maintain inefficient, often manual processes for years because they did not have a better way to perform the tasks before adopting Acumatica. Since Acumatica automates many routine tasks, your company can replace, revise, or even eliminate these antiquated business processes. The last thing you want to do is complete your migration to Acumatica and spend time with manual processes that are no longer necessary.

Acumatica offers features that can help refine business processes across your organization. Your partner can help you leverage Acumatica to streamline processes, increase productivity, and reduce costs.

Plan for ongoing support

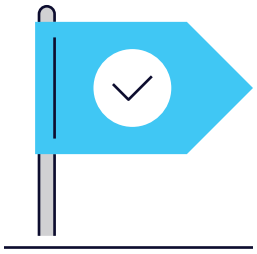
In addition to developing the necessary training, make sure you have the support you will need to field questions and resolve problems post-adoption. Discuss early your support options with your Acumatica partner for a support program that fits your needs and budget.



"I find more people are using Acumatica because it's intuitive, makes sense, and is so easy to use. We don't have spreadsheets flying around, and people have access to the same data all the time."

Dave Munson, Founder and CEO, Saddleback Leather

Helping you get the most out of your Acumatica investment is our primary goal.



Acumatica is the world's fastest-growing provider of cloud business management software. And that's not a coincidence. We view customers as our most important assets and are committed to their success. Acumatica is consistently ranked highest in Usability by Nucleus Research and G2 Crowd and noted as highest in Customer Satisfaction by Gartner in its Magic Quadrant for Cloud Core Financial Applications.

Use this playbook to work with your Acumatica partner so they can help your organization get the most benefit from Acumatica.

Free Product Tour

https://www.acumatica.com/tour

For more information, contact us:

https://www.acumatica.com/contact-acumatica/

Phone: +1-888-228-8300

Email: **info@acumatica.com**

About Acumatica

Acumatica Cloud ERP provides the best business management solution for digitally resilient companies. Built for mobile and telework scenarios and easily integrated with the collaboration tools of your choice, Acumatica delivers flexibility, efficiency, and continuity of operations to growing small and midmarket organizations.

Business Continuity. Delivered.

Acumatica
The Cloud ERP