

How Acumatica's Award-Winning Usability Empowers Success

AMPLIFY PROFITABILITY WITH SUPERIOR USABILITY

When shopping for ERP software, companies often focus on what the system does and overlook how it performs for each user. Unfortunately, failing to recognize the correlation between end-user experience and business outcomes puts companies at substantial risk. For example, Gallup uses technology experience as one way to measure employee engagement. Companies that effectively engage staff experience 21% higher productivity, 20% higher sales and 10% higher customer ratings, and 41% lower absenteeism. Meanwhile, poor employee engagement costs companies around the globe \$450–550 billion in yearly losses.¹

Users avoid ERP software that does not perform the way they want. Instead, they create manual workarounds that increase errors and information siloes. Therefore, companies should analyze usability from multiple perspectives when evaluating ERP systems and understand how the software performs critical operations.

In addition, user expectations vary by role, technology savvy, professional experience, and background. Executives have different expectations than field workers. Usability expectations also vary among digital immigrants, digital natives, and power users. Companies must evaluate ERP usability by function to determine how the software facilitates different operations and whether the usability enhances efficiency or compromises it.

"What's the point in having the best functionality if few people within the business can actually use it?"

Nucleus Research²



Acumatica delivers superior usability to all employees and departments by enabling diverse users to efficiently complete their work with a minimal learning curve and without IT assistance. Acumatica's user-centric interface, simplified navigation, and streamlined integrations deliver optimal usability. As a result, Acumatica consistently wins customer and industry awards for usability.

This eBook provides an overview of essential usability characteristics and their impact. Discover how usability expectations vary between users based on their roles, departments, and backgrounds. Learn how to leverage a highly usable, modern ERP solution to amplify business outcomes throughout the organization.

DISCOVER HOW USABILITY EMPOWERS BUSINESSES



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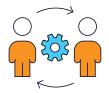
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¹ Gallup State of the Global Workplace Report

² Nucleaus Research, **SMB ERP Technology Value Matrix**



EMPOWER SUCCESS

Why ERP Usability Matters

Too few companies consider how their technologies' usability affects their ability to meet mounting, diverse challenges. For example, when workers must navigate multiple systems, multi-step processes, and disjointed workflows to complete everyday tasks, profitability suffers. Learn how superior ERP usability empowers users with intuitive, integrated processes, automated tasks, artificial intelligence, and collaboration tools that promote growth while alleviating frustration.

"With Acumatica, I'm giving employees an ultra-efficient tool they need to do their jobs correctly and allowing them to do things easier. I'm handing them a smartphone versus a rotary phone. They are more well-equipped to do their jobs, which produces good outcomes for customers and helps us build the business."

- MATTHEW SHAMP, EXECUTIVE DIRECTOR, CARLSON-LAVINE INC.

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JUMPSTART PROGRESS

Usable ERP systems prove easy to implement and upgrade. They deliver straightforward processes and integrated workflows that enable companies to start reaping benefits immediately with minimal training. Conversely, users avoid software with steep learning curves and develop manual workarounds that increase errors and siloed processes.

Acumatica fuels progress with an easy-to-use, easy-to-learn, and adaptable solution.

PROMOTE FUTURE GROWTH

Disparate systems impede visibility into real-time operations, which thwarts growth. Acumatica accelerates growth with a centralized solution and robust business process management that is easy to navigate and delivers end-to-end visibility. Integrated workflows connect processes. Real-time insights inform decisions. Native and certified integrations promote growth by enabling companies to extend the system's reach across multiple industries and applications. The open architecture lets companies connect with new technology to support growing divisions and product lines with minimal programming.

Acumatica fosters global growth with multi-language, multicurrency, and localization services.

EMPOWER AGILITY

Modern ERP solutions enable companies to adapt to market changes by connecting people, processes, and technology. Staff share real-time sales, inventory, and operational data, which helps forecast needs and reallocate resources.

Acumatica's mobile framework and responsive design promote agility, equipping users to work seamlessly anywhere, anytime.

FOSTER INNOVATION

Usability drives innovation in multiple ways. Automating manual tasks enables staff to focus on strategy and innovation. However, emerging technologies will not promote



innovation unless they address real-life issues. Many ERP providers pursue enhancements without first aligning them with client needs. Acumatica seeks innovation to solve customer problems and emerging technologies to enhance user experience. For example, it leverages artificial intelligence and machine learning to autocomplete fields and side panels to present relevant data. User-defined fields let individuals tailor applications and forms. Power BI's analytics arm users with strategic decision-making power. Creative ideas and problem-solving abound when employees spot issues and trends on Acumatica's personalized dashboards. They use unified communications to collaborate, and automated workflows to free up time and fuel innovation.

Acumatica collaborates with customers to pursue innovations that maximize their success.

ENHANCE EMPLOYEE ENGAGEMENT

Forcing users to adopt unfriendly software cost companies millions while disengaging employees who struggle to complete their work. Intuitive interfaces and navigation ignite engagement. Giving workers remote access to the same tools and experience enhances productivity.

Acumatica engages employees with multichannel communication that integrates diverse business and collaboration applications on one platform.



USABILITY REQUIREMENTS

What Usability Entails

Cloud ERP systems surpass their on-premises predecessors with modern interfaces and greater access. Distinguishing usability between different cloud ERP systems requires a deeper look into the following categories.

"Unlike the other ERP applications out there, Acumatica is super intuitive and usercentric, meaning you don't need a mammoth team of ERP experts in-house to get the job done."

- DEVIN SAMAYAMANTHRI, CHIEF OF STAFF, DESIGN STUDIO

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ACCESS TO TOOLS AND DATA

An ERP system should deliver immediate access to real-time and historical event records, tools, and applications. Some providers deliver real-time data but charge for historical data. Acumatica makes all information immediately available via a central database that ensures accuracy. Users can access the Universal Search field on every screen to request records and menu items. They can use Generic Inquiry to publish any data, including data in custom fields, without IT support or coding. In addition, employees can create reports, dashboards, and tables and format data for Microsoft Power BI analysis.

Acumatica empowers workers to access what they need when they need it. For example, they can access free online help for instructions and cross-reference records.

NAVIGATION AND AUTOMATION

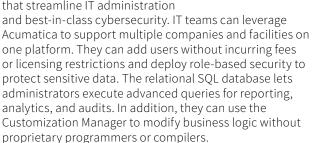
Users want software they can easily navigate and work without toggling between siloed applications and processes.

Acumatica's integrated functions and automated work-flows enable users to complete their work and view related processes from one screen. For example, users receive a 360-view of financials, payroll, customers, and more. Therefore, sales can check inventory, order status, customer history, and payments on one system. Furthermore, users can keep tasks moving on a mobile app that recognizes and processes documents, receipts, work orders, approvals, and more.

With Acumatica, companies can configure workflows and create events to manage by exception without programming. They can leverage AI and machine learning to automate data entry and real-time alerts to keep tasks moving.

EASE OF ADMINISTRATION

A modern ERP system simplifies IT administration with a wholly contained solution. Acumatica does this and more, providing automated backups that streamline IT administration



Acumatica's Visual Workflow Engine enables users to adjust workflows by dragging and dropping elements. Import and export scenarios let them transfer data without coding.

SCALABILITY

Business and operational demands change constantly. Therefore, the ERP system must flex with evolving needs. For example, Acumatica automatically scales data processing resources to optimize system performance during peak demands. Companies can leverage the open architecture, web services, and modern APIs to connect people, processes, and equipment across a global enterprise. The extensible platform also offers Device Hub to manage standard hardware connections, like credit card terminals, barcode scanners, and cash registers.

Acumatica's native cloud ERP solution allows businesses to scale up or down as their needs demand without purchasing new hardware and/or software licenses.



EXPECTATIONS

Common Usability Expectations

Usability carries different meanings for different people. Effective ERP software anticipates and fulfills each user's expectations for data retrieval, task competition, and analytics. Everyone should enjoy an intuitive experience, whether working full-time in ERP applications or occasionally accessing the system to import or retrieve data. As a result, companies should seek software that facilitates continuous improvement for all users, from C-level executives to entry-level workers, regardless of their technical savvy. It should include the following:

- **Centralized database** that gives all users access to real-time information, ensuring everyone works with one version of the truth and presents end-to-end visibility across core functions and related processes.
- **Automated workflows** that optimize manual tasks from accounting to inventory and warehouse management. For example, the ERP system should connect back and front office processes, upload receipts, process documents, and manage projects.
- Intelligent applications that leverage machine learning to present relevant insights and automate tasks based on context.
- **Personalized reporting** that generates standard reports on demand and lets them personalize dashboards and KPIs without IT intervention.

"It's all about how Acumatica listens to you and how quickly they respond. They really do want to hear from users to understand our business processes so they can incorporate new features and enhancements to make things even easier. It's just amazing!"

- KELLY BURNS, ERP DEVELOPER & FORMER COO, M3 TECHNOLOGY GROUP

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ADDITIONAL USER CONSIDERATIONS

DIGITAL NATIVES AND IMMIGRANTS

Today's workforce comprises five generations with different expectations and experiences. ERP software must empower each. Younger staff who grew up with smart technology expect automated, transparent workflows, intuitive interfaces, and logical navigation. The digital natives shun training but expect to jump in and reap immediate results.

Conversely, older staff who started their careers with less technology dependence often desire detailed training and ongoing help. Digital immigrants find multistep navigations and interacting with multiple, siloed applications frustrating.

Both groups of users appreciate simple navigation and automation, while immigrants embrace online help and universal search. In addition, all users enjoy personalized workspaces and integrated workflows.

Acumatica delivers usability for all generations. The modern ERP solution provides full transparency into processes with a central data source that gives everyone the data they need.





Power users perform resource-intensive processes, such as developing software, designing graphics, creating videos, and producing audio courses. Therefore, they need ERP software that aggregates large quantities of data and supports high-bandwidth demands without impeding performance.

Acumatica's modern Cloud ERP solution puts extensive computing power in the power user's hands. As a result, they can work productively without worrying that the system will shut down and lose data or cause latency problems.

Universal search helps workers maximize the system's functions by providing access to data, applications, and menu items. Generic Inquiry lets them create custom reports on the fly without coding. They can use multidimensional reporting to analyze data from multiple perspectives and formats, such as pivot tables, and drill down to examine sources. Developers can leverage the open architecture to connect to third-party systems to access the needed applications.



USABILITY FEATURES

Core ERP Usability Features

Traditional ERP systems lacked usability. Since they proved difficult to navigate and maintain, users struggled to efficiently complete tasks. Modern ERP systems improved the user experience with more intuitive workflows and navigation. However, user experience can still vary significantly between systems. Companies should look for features that provide the best experience for all users. The following chart highlights top usability capabilities.

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	Industry-specific, native Integrations	Certified ISV marketplace extensions

"With NetSuite, it was so difficult to remember how to get to the right screen, so employees began using Google docs, Sheets, and Excel as a workaround because they didn't want to ask how to do something again. 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."



ROLE-BASED USABILITY

What Executives Demand

Every day, executives make strategic decisions and troubleshoot unexpected issues. The right information at the right time and at the right level of detail is power. In addition to providing real-time insights, the ERP system must flex to meet varying demands and preferences. Consider how the software addresses varied executive expectations.

"Acumatica has been a game changer. It's made a huge difference in how we do things, how we can access everything we need from anywhere, and allowed our salespeople to work remotely."

 HECTOR PINTO, CEO AND CO-FOUNDER QUALITY MATERIAL HANDLING, INC.

LEADN MODE

CHIEF EXECUTIVE OFFICER (CEO)

CEOs make strategic decisions that impact company growth. Consequently, they require instant access to analytics that track business revenue, sales by product line, specific markets, stakeholder metrics, and customer behavior.

Role-based, personalized dashboards surface KPIs to CEOs, enabling them to research the context for each data point. In addition, CEOs can use Generic Inquiries to create custom reports on the fly without coding or requesting IT assistance.

Acumatica empowers CEOs to quickly make informed decisions with real-time performance insights on every department and core metric.

CHIEF FINANCIAL OFFICER (CFO)

CFOs oversee the company's fiscal health. They monitor direct revenue, working capital, cash flow, investment ROI, month-end closing, financial planning, performance analysis, budgeting, and forecasts. Consequently, they need automated financial processes that reduce error, drive transparency into each metric, and mitigate risk. In addition, they need collaboration tools to inform internal and external partners, such as banks, CPA firms, and auditors.

Acumatica's robust financial management suite streamlines a full range of financial processes from accounting to bank feeds. It presents 360-degree views of every area with drill-down capabilities that let CFOs examine sources on the fly. The system ensures everyone works with accurate data.

Acumatica deploys advanced analytics, such as Power BI, to identify risks and opportunities.

CHIEF OPERATIONS OFFICER (COO)

COOs supervise operations, such as distribution workflows, supply chain policies, transportation, logistics, inventory, warehouse, construction, or manufacturing operations. Therefore, they need current and historical performance data to manage resources, budgets, planning, and personnel.

Acumatica automates operational workflows so COOs can minimize labor costs and errors. Role-based dashboards present performance trends and improvement opportunities.

Multidimensional reporting and analytics deliver key metrics with context to fuel growth.

CHIEF TECHNOLOGY OFFICER (CTO)

CTOs and Chief Information Officers (CIOs) drive IT ROI, digital transformation, and profitability while overseeing user and customer satisfaction. CTOs strive to make modern, user-friendly technology available to engage users and complete tasks. They also research and select systems that fuel business and security goals.

Acumatica enables CTOs to optimize financial, business, construction, distribution, warehouse, and retail operations while providing a single source of truth to all users. They can deliver secure, role-based access to unlimited users without additional fees and maximize service levels using embedded CRM with employee and customer case management.

Acumatica's open architecture and APIs connect diverse hardware and software to provide transparency into operations.





FUNCTION-BASED USABILITY

What Departments Want

No software provides every feature and function an organization needs. The same applies to usability, so companies should analyze how ERP software supports core departments.

"Acumatica has been really transformative for our business. It made our team joyful about how they were working, not stressed or worried . . . "

 CHRIS WILLIAMS, DIRECTOR OF BUSINESS OPERATIONS INTERACTION ASSOCIATES

I FARN MORE >

INFORMATION TECHNOLOGY

IT staff are the backbone of most companies, keeping operations running. Employees possess a range of IT expertise, such as cybersecurity, software development, IT administration, and end user support. IT leaders value user-centric design, modern and emerging technology, transparency, and advanced reporting.

Built on a native cloud, Acumatica empowers IT staff to support multiple sites and thousands of users. Multilayer security with pre-defined roles and cybersecurity protects data. Employee case management fuels SLAs. The open architecture, APIs, and no-code/low-code tools let them connect to external systems without extensive programming. Data exchange services and import/export scenarios pull data from diverse hardware and software.

With Acumatica, companies can upgrade the platform without affecting operations and add users without budget concerns.

FINANCE

Finance keeps the business moving forward, balancing the books, proving compliance, and managing payroll. Since SMB finance staff often juggle multiple roles, they need intuitive ERP software that enables them to navigate easily between financial functions and see all related information at a glance. The ERP system must also automate and connect tasks, ensure accuracy, transfer data, and deliver timely reports.

Acumatica offers a robust financial suite that seamlessly manages deferred and recurring revenue, project accounting, contract management, tax compliance, billing, asset depreciation, and payroll. Connected applications feed into role-based dashboards for real-time reports, featuring pivot tables, advanced filters, and flexible sorting parameters. Users can drill down to research transactions. Integrated workflows and intuitive navigation boost efficiency.

Acumatica automates numerous financial processes, such as expense receipt capture, AP document recognition, and period close tasks.

CUSTOMER SUPPORT

For customer support staff, usability means having the ability to address customer issues promptly. In addition, they need visibility into customer history, production, and order



fulfillment to diagnose problems and find solutions. They also need a system that can prioritize high volumes of data. Acumatica's embedded Case Management presents staff with customer history and automatically assigns new support cases. Users can access orders, billing, inventory, production delays, and correspondence to troubleshoot problems. Additionally, automated alerts notify staff of new requests and priorities.

Acumatica's Self-Service Portal enables customers to proactively address issues by submitting requests, checking their status, and finding answers to common problems.

MARKETING AND SALES

Most marketing and sales teams maintain distinct and often disconnected applications. Siloed systems and processes prevent each group from leveraging analytics, customer input, and history to make decisions and spark creative problem-solving.

Acumatica's unified CRM and ERP solution captures all marketing, sales, billing, and customer data in one place, providing a 360-degree view of the business. Sales can personalize each prospect interaction. Marketing can use the HubSpot Connector to launch and track integrated marketing campaigns to generate opportunities. Realtime dashboards and analytics inform campaigns and equip managers to support pending deals.

Acumatica automates marketing, sales, and support tasks. The solution can update quotes or create multiple quotes for a single opportunity and automatically generate sales orders and invoices.

"Acumatica has exceeded our expectations. From a technology and operations point of view, Acumatica ticks all the boxes: It's engaging for users, scalable, flexible to meet your needs, and grows with you as a business."

- CHRIS DRAKE, CHIEF OPERATING OFFICER, SMARTNUMBERS

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INDUSTRY-BASED SOLUTIONS

How Usability Affects Industries

Usability encompasses a diverse array of capabilities that vary significantly between industries. Most organizations adopt a piecemeal approach to digitizing functions, such as barcode scanning, which creates data siloes that block transparency into operations. Acumatica industry editions deliver comprehensive solutions with deep industry expertise, 360-degree views, and superior usability.

CONSTRUCTION

Acumatica Construction Edition arms users with real-time project data through role-based dashboards, analytics, flexible reporting, and inquiry capabilities. Project and expense data is available to them whether they work on a construction site, in a remote office, corporate office, or anywhere else. The mobile framework puts estimating power and detailed plans at their fingertips. Construction workers can adjust blueprints and update material costs or project plans on-site with the PDF annotator and speech recognition capability. Managers can approve expenses anywhere, anytime. In addition to robust financials, companies can deploy top construction management and estimating programs on a single platform. The solution enables field, office, and remote workers to:

- Stay updated on projects, expenses, labor costs, and more with unified construction accounting software on a centralized relational database.
- Keep users engaged and projects moving by eliminating inventory and PO management delays, including drop-shipping to the job site and optimizing project material controls and operations.
- Expose changes in project scopes, labor, materials, and equipment using triggers and drill-down capabilities.
- Simplify expense management with receipt capture from your smartphone.
- Connect field workers with remote managers via configurable approval workflows for submittals, drawings, photologs, daily field reports, timecards, and RFIs, on any device.

DISTRIBUTION

Acumatica Distribution Edition connects and illuminates processes throughout the distribution cycle, enabling warehouse, shipping, and transportation workers to manage daily tasks without leaving Acumatica. For example, users can receive live orders from multiple sales channels and view inventory across locations using any browser-enabled device. Workers can more easily:



- Improve order management and eliminate errors with seamless connectivity into Acumatica and ability to leverage customer order history.
- Manage inventory and warehouse transfers, create pick lists, and process packaging.
- Simplify item and inventory management with matrix items, lot and serial tracking, and configurable unit of measure conversions.
- Optimize stock levels to avoid rush orders and stock-out scenarios using replenishment features with increased inventory turns and lower carrying costs.
- Boost online sales with commerce, point of sale, and field service applications.
- Create new orders based on customer order history with stock reservations and requisition workflows for purchase approvals with bids for vendor quotes.

MANUFACTURING

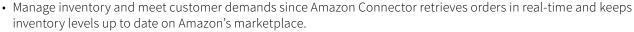
Acumatica Manufacturing Edition uses embedded and connected functionality to maximize usability and streamline processes for all parts of the manufacturing business. The modern ERP system manages and analyzes production order details, costs, and resources with manufacturing data collection via mobile devices for clock-in and clock-out of jobs, material issues, and real-time job costing. Users can easily:



- Deploy advanced scheduling algorithms and demand forecasts to manage their workload.
- Synchronize demand with purchasing and production.
- Improve estimate-to-order conversions with automated processes.
- Maximize resources with finite capacity scheduling.
- Shorten the engineering to manufacturing hand-off with engineering change orders and connectors for CAD and PLM applications.
- Access real-time production data for costing and efficiency with manufacturing data collection.
- Manage production standards with the bill of material global replace, copy, import, and visual engineering workbench features.

RETAIL

Acumatica Retail Edition provides a holistic business system for retailers to connect online and in-store retail and commerce applications with the back-office ERP system. Acumatica enables receipt of orders from the Web, mail orders, telesales, or in-store purchases. Seamless eCommerce integrations with BigCommerce, Shopify, and Magento let users pull in orders from point-of-sale (POS) devices. In addition, users can more easily:



- Track orders, handle returns across channels, and offer targeted programs.
- Address late inventory receipts, isolate vendor quality issues, and spot buying trends.
- · Accept orders, charge applicable taxes, process credit card transactions, and adjust inventory.

"We were running blind before. Now, we can see volume, location, and product type. Managers can prepare and put new orders into the production schedule. If a system is easy to use, then it will get used, and that, ultimately, is what we want as a business. I am still amazed that I can sit in Starbucks drinking coffee while looking at our ERP solution. That is the flexibility and usability all companies should expect nowadays."



AWARD-WINNING USABILITY

Acumatica Earns Top Marks for Usability

Multiple research firms award Acumatica top scores for usability, using customer reviews, technology evaluations, and proprietary algorithms to calculate results. Hundreds of customers gave Acumatica high marks for ease of use, technology, and customer responsiveness. Gartner agreed, awarding Acumatica its highest customer satisfaction score of 97%.

GARTNER PEER INSIGHTS

Acumatica received a near-perfect Overall User Rating in The Gartner Peer Insights. Gartner Peer Insights and Gartner Digital Markets provide rigorously vetted reviews. Acumatica received a 4.4-star rating with 91% and 94% of users, respectively, giving a four-or-five-star rating). One five-star review praised "ease of use, great

dashboards, powerful technology, easy to integrate, and easy access to data."





G₂

Every quarter, G2 awards Acumatica top honors in multiple usability categories based on customer feedback from online communities, social media posts, and 600+ customer surveys.











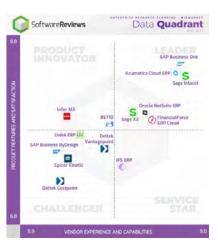
SOFTWARE REVIEWS

SoftwareReviews, a division of InfoTech
Research Group, awarded Acumatica
Champion status in their Emotional Footprint
Report on Enterprise Resource Planning.
With 960 customer reviews based on
25 questions, the Emotional Footprint Report
uses Value Index (value users gain from the software vs.
what they pay) and Net Emotional Footprint (how users
feel about the software) scores to rank vendors. Acumatica
received Champion status and the highest number of
customer reviews.

INFO-TECH RESEARCH GROUP

Info-Tech publishes SoftwareReviews, which evaluates ERP software against multiple usability criteria. It named

Acumatica a leader in the ERP midmarket based on reviews of product features and satisfaction, vendor experience, and capabilities.



NUCLEUS RESEARCH

Nucleus Research assigned Acumatica Leader status in their esteemed Technology Value Matrix, which ranks ERP

systems based on their usability and functionality. It provides a relative positioning of the important vendors in a market and delivers a framework for assessing the suitability of a solution for a particular customer.



"Acumatica listens carefully to its customers and delivers innovation that is practical and useful . . . And even some of the simplest features have an enormous impact on efficiency and productivity."



CONCLUSION

Acumatica Delivers Proven Usability for Everyone

Usability's hidden power lies in its ability to equip the greatest number of users (employees, partners, and customers) with the intuitive ability to efficiently perform functions that drive results. Acumatica capitalizes on usability to accelerate profitability throughout a global enterprise.

Tap into Acumatica's superior usability to overcome the issues that plague most ERP systems. Boost profitability by empowering users to work efficiently and, often, joyfully.

Implement an ERP solution that effectively engages all departments and users, from digital natives to digital immigrants and executives to field workers, delivering transparency across operations and instant access to tools and information.

Discover full-featured usability for construction, distributors, manufacturers, and retailers that Acumatica Industry editions deliver. Take advantage of a mobile framework and responsive design that lets users access their personalized workspace, dashboards, KPIs, and alerts anywhere, anytime. See how easy it is to configure the ERP solution to meet your needs without programming. Leverage the open architecture and Open APIs to develop connections to new software and hardware systems with ease.



"Acumatica was easy for our entire team to learn, and it's also affordable. I love that the product will grow with us as our organization size grows to save more lives. If you're looking for ways to become more efficient, don't wait any longer to find the right solution."

- KELLY WHITE, CEO, LIFESOURCE

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 Resilience, Delivered.

Learn more about how Acumatica can work in your business by visiting us online at www.acumatica.com.