



*We'll get you there.*

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# How to Simplify Quote-to-Cash With Acumatica ERP

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# Who We Are



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# Topics

## Challenges, Actions, New Reality

- Industry Expertise

## Improving w/ Acumatica ERP

- Acumatica Demonstration

## What's Next



# Challenges & Impact

Challenges

- Quoting & Order capture
- Finished Goods & Production Lead Times
- Invoicing

Actions  
Needed

- Fully Automate Workflow
- All on a Single Platform
- Proactive Exception Handling

New  
Reality

- Shorten cycle time
- Free up Capital
- Improve CSAT



# Acumatica Demonstration

Acumatica Search... Revision Two Products Products: Wholesale 7/8/2023 8:01 AM admin

Sales Order Details by Inventory Item

Company: Company User: admin admin Date: 7/8/2023 Page:

Inventory ID	Item Description	Subitem									
02697	<a href="#">Phelipa Beef Strip</a>										
Type	Ref. Nbr.	Currency	Status	Customer ID	Customer Name	Warehouse	UOM	Order Qty.	Open Qty.	Line Total	Op
SO	SC005417	USD	Open	ABARTENDE	USA Bartending School	WHOLESALE	POUND	1.00	1.00	10.29	Op
								Total USD:	1.00	1.00	10.29
10004	<a href="#">VINYL GREY / BLACK @ 11 INCH</a>										
Type	Ref. Nbr.	Currency	Status	Customer ID	Customer Name	Warehouse	UOM	Order Qty.	Open Qty.	Line Total	Op
SO	SC005482	USD	Open	ABARTENDE	USA Bartending School	WHOLESALE	FOOT	4.00	4.00	280.00	Op
								Total USD:	4.00	4.00	280.00
	<a href="#">SIDE RELEASE PLUG 1" BLACK</a>										
Type	Ref. Nbr.	Currency	Status	Customer ID	Customer Name	Warehouse	UOM	Order Qty.	Open Qty.	Line Total	Op
SO	2005456	USD	Open	ABARTENDE	USA Bartending School	WHOLESALE	EA	1.00	1.00	44.12	Op
								Total USD:	1.00	1.00	44.12
	<a href="#">1.5"x1.5" Smooth Extrusion-Lite</a>										
Type	Ref. Nbr.	Currency	Status	Customer ID	Customer Name	Warehouse	UOM	Order Qty.	Open Qty.	Line Total	Op
SO	2005454	USD	Open	ABARTENDE	USA Bartending School	WHOLESALE	IN	1.00	1.00	17.44	Op
SO	2005456	USD	Open	ABARTENDE	USA Bartending School	WHOLESALE	IN	1.00	1.00	17.44	Op
SO	2005456	USD	Open	ABARTENDE	USA Bartending School	WHOLESALE	IN	5.00	5.00	87.20	Op
								Total USD:	7.00	7.00	122.08
	<a href="#">Acer Laptop Computer</a>										
Type	Ref. Nbr.	Currency	Status	Customer ID	Customer Name	Warehouse	UOM	Order Qty.	Open Qty.	Line Total	Op
SO	3007209	EUR	Completed	CARIBBEAN	Caribbean Secretary Online	WHOLESALE	EA	50.00	0.00	22,146.50	Op
SO	3009048	EUR	Completed	ASBLBAR	Nautilus Bar SABL	WHOLESALE	EA	1.00	0.00	451.30	Op

Warehouse Manager

10:55

4 SHIPMENTS TO PICK AND PACK

0 LATE SHIPMENTS

GOODS TO PUT AWAY

Warehouse ID	Inventory Item	On Hand	Process
VA-WHOLESL	Widget 01 - High volu...	4,495.00	
WHOLESALE	Widget 03 - Standard ...	100.00	
WHOLESALE	Widget 01 - High volu...	19,500.00	

ON TIME SHIPPING RATIO

Legend

Year	On Time Shipping Ratio
2020	1.0
2021	1.0
2022	1.0
2023	1.0

Receiving Clerk

4 OVERDUE PO RECEIPTS

1 RECEIPTS WITH NO BILLS

0 PENDING TRANSFERS

0 INCOMING RETURNS



*Thank you!*

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