

Professional Services Edition

GROW WITH A MODERN PROJECT-CENTRIC ERP PLATFORM



“Our operation managers are analyzing their profits and losses much better. We are able to look at which projects we are not doing well on—talk about those—and figure out how to do things differently next time and not make the same mistakes.”

Gary Gardner, CEO, Industrial Specialty Services
Industry: Engineering and Technical Solutions



Professional Services

Acumatica Professional Services Edition is a comprehensive modern cloud ERP application with project management, project accounting, and resource management. Embedded CRM gives firms detailed records of client interactions, proposals, contracts, and payments. Empower clients with the ability to access service and support cases from the self-service portal.

Its superior mobile capabilities arm employees in the field with time and expense tracking, and real-time project data using role-based dashboards. The user-friendly platform includes flexible billing, including milestone, fixed-price, or time and material billing, coupled with change management, and

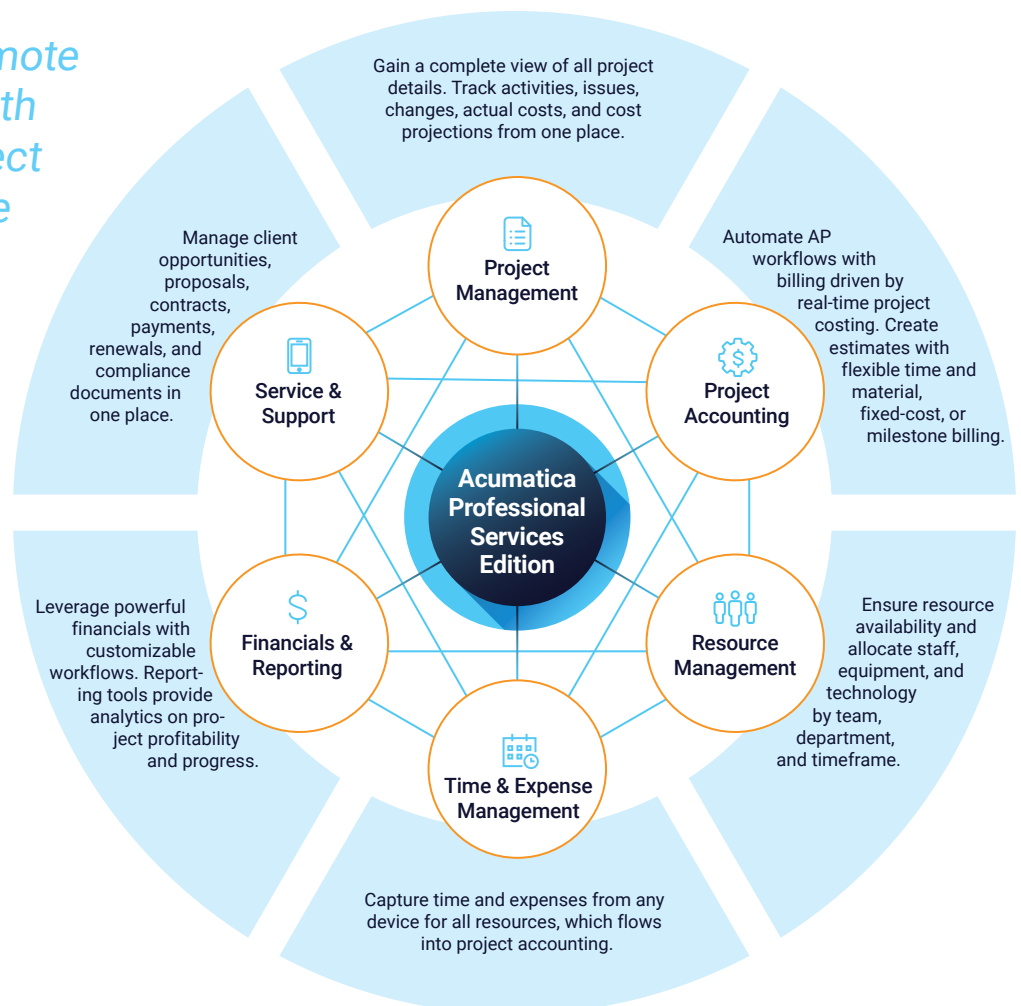
robust financials with forecasting, payroll, and cash management. Manage the process of recognizing revenue with automation workflows. Dashboard drilldown reports easily identify changes in project scopes, labor, materials, and equipment.

Connect to popular applications for a platform that is tailored to your organization's complex and evolving business needs. Automate routine tasks and improve data processing for accounts payable and other business operations with native artificial intelligence and machine learning. Optimize resource allocation and eliminate project timeline delays with a complete professional service solution.

Connect office and remote workers in real-time with cloud and mobile project management, resource allocation, and accounting software.

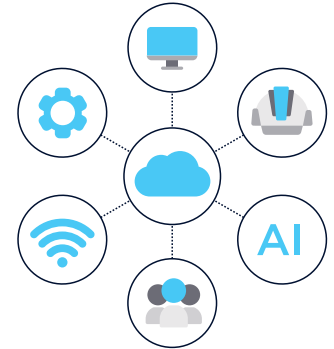
"Acumatica definitely positions us for growth. The way we were doing things was outdated. Acumatica better aligns with our growth path and ever evolving business needs."









**Randy Gieseck, President,
Safety Management Group**
Industry: Professional Services



A to Z Functionality for Professional Services

Organizations in the professional services industry navigate a multifaceted and complex business environment that traditional ERP platforms cannot support. Acumatica allows you to grow and evolve with a scalable, secure, and mobile cloud platform. Acumatica's all-in-one solution connects every part of your business—from estimates and proposals, to project and resource management, to field service support. Automate change order workflows and project issue notifications and connect field and office teams in real-time. Gain company-wide visibility into project budgets vs. actual costs, commitments, schedules, and contracts—allowing for tighter project controls and time and money savings. Attach documents and files to projects, comply with industry regulations, and stay informed with daily field reports and mobile access to project. Streamline financials with native payroll management and flexible contracts. Thrill clients with a self-service portal for access to support cases and better communication.



-  **Architectural Firms**
Design-Build/Construction Management, Architectural Services
-  **Safety and Security**
Security System Monitoring, Safety Management and Training
-  **Engineering Firms**
Civil, Electrical, Industrial, Mechanical, Structural
-  **Technology Services**
Managed Computer and Application Services, Audio Visual Installation
-  **Surveying Firms**
Surveying
-  **Utilities and Communication Services**
Electrical, Water, Solar, Energy, Telecommunications, and Other Services
-  **Business Services**
Consulting, Business Management, Advertising, Marketing
-  **Other Services**
Staffing, Legal, Accounting, and Other

Project Manager

- ACTIVE PROJECTS: 10
- LATE PROJECT TASKS: 4
- PROJECTS, LOW BILLING RATIO: 1
- UNDER UTILIZED EMPLOYEES: 9
- OVER BUDGET PROJECTS: 1
- UNPROFITABLE PROJECTS: 3
- MY TASKS: 5
- MY OVERDUE TASKS: 3

BUDGET - EXPENSES (ACTIVE PROJECTS)

Project	Expenses	Budget
THR03	-10,000	0
PRO0000009	-5,000	0
FIXEDP05	2,000	0
THR02	3,000	0
BUDGETBYM	4,000	0
FIXEDP06	5,000	0
REVRECCO	6,000	0
REVREC01	7,000	0
INTAKM	8,000	0

EXPENSES VS BUDGET (ACTIVE PROJECTS)

Description	Created Date	Original Budgeted Amount in Base Currency	Hist. Ac Amount Base Curre
T&M project with inventory issue	1/18/	98,340.00	96,300
Marlin Beverage Process Re-architecture	1/18/	9,920.00	18,812
Revenue reconing based on labor	1/18/	11,250.00	2,814
Internal marketing campaigns for 2018-2019	11/5/	20,000.00	6,850

EST PROFIT % BY PROJECT

Project	Description	Est. Cost	Est. Revenue	Est. Profit %
1002H...	The Beach Hotel	40.7	29.4	11.3
1003R...	Italian Restaurant	2.18	1.84	84.5
1004...	The Equity Co.	5.45	4.18	1.35
1005G...	Example Org	399	285	133
1005H...	Flora Custom	1.86	1.82	322

CONTRACT STATUS BY PROJECT

Project	Description	Original Contract	Agree Contract	Review Contract
1002H...	The Beach Hotel	38.71	1.018	40.73
1003R...	Italian Restaurant	2.186	0.00	2.186
1004...	The Equity Group	5.45	0.00	5.45
1005G...	Example Org	399	0.00	399

Manage your business by exception with real-time, accurate, and complete finance, operations, and project data available anytime, anywhere, on any device with Acumatica Professional Services Edition.

Professional Services Edition Features

RESOURCE MANAGEMENT



Resource Allocation



Time & Expense Management



Scheduling

PLANNING



Estimates



Forecasting



Proposals



CRM



Reporting & Analytics



Planned vs. Actual Costing

PROJECTS



Project Management



Project Accounting



Time & Expenses



Automated Workflows



Change Control



Daily Field Reports

FINANCIALS



AP/AR



General Ledger



Cash Management



Revenue Recognition



Milestone Billing



Payments

SERVICES



Self-Service Portal



Contract Management



Support Cases



Compliance



Appointment Scheduling



Document Management

ACUMATICA CLOUD PLATFORM



Advanced Authentication



Low Code / No Code Framework



Cross-browser Support



Integration & Web Services



Multi-tenant



AI & ML



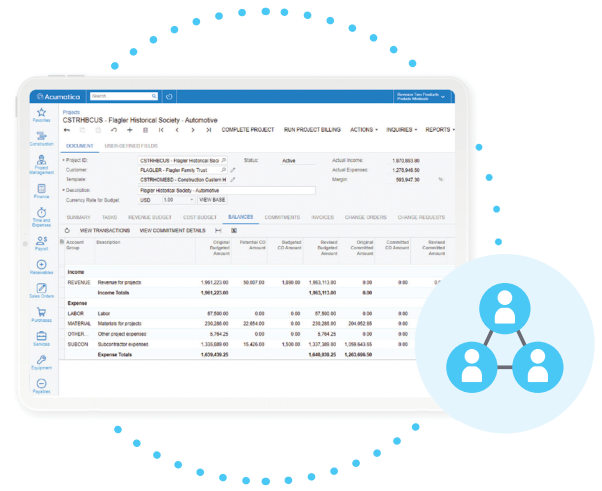
Mobile Framework



Role-based Security

Connect Remote and Office Staff

The ability to collaborate across departments and projects is critical for any business. Acumatica's robust cloud-native design and mobility power work forward for project staff, regardless of location. Business leaders monitor multiple projects, and empower remote time entry and expense management. Managers can access real-time project information from any connected device including estimates, proposals, forecasting, resource management, and scheduling.



Extend Acumatica with Certified Applications

The Acumatica Marketplace is a leading community of independent software vendors. Connect your application to an extensive list of certified plug-and-play applications for advanced reporting, estimates, proposals, human resources, and workforce management.



ProjectManager

included in the Professional Services Edition as a complete Project Planning and Resource Management tool.

Velixo

Avalara

workforce go!

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

Chris Drake, COO, Smartnumbers
Industry: Software & Technology

Discover Why Top Professional Services Companies Rely on Acumatica for their Success



LAUNCH THE VIEWER



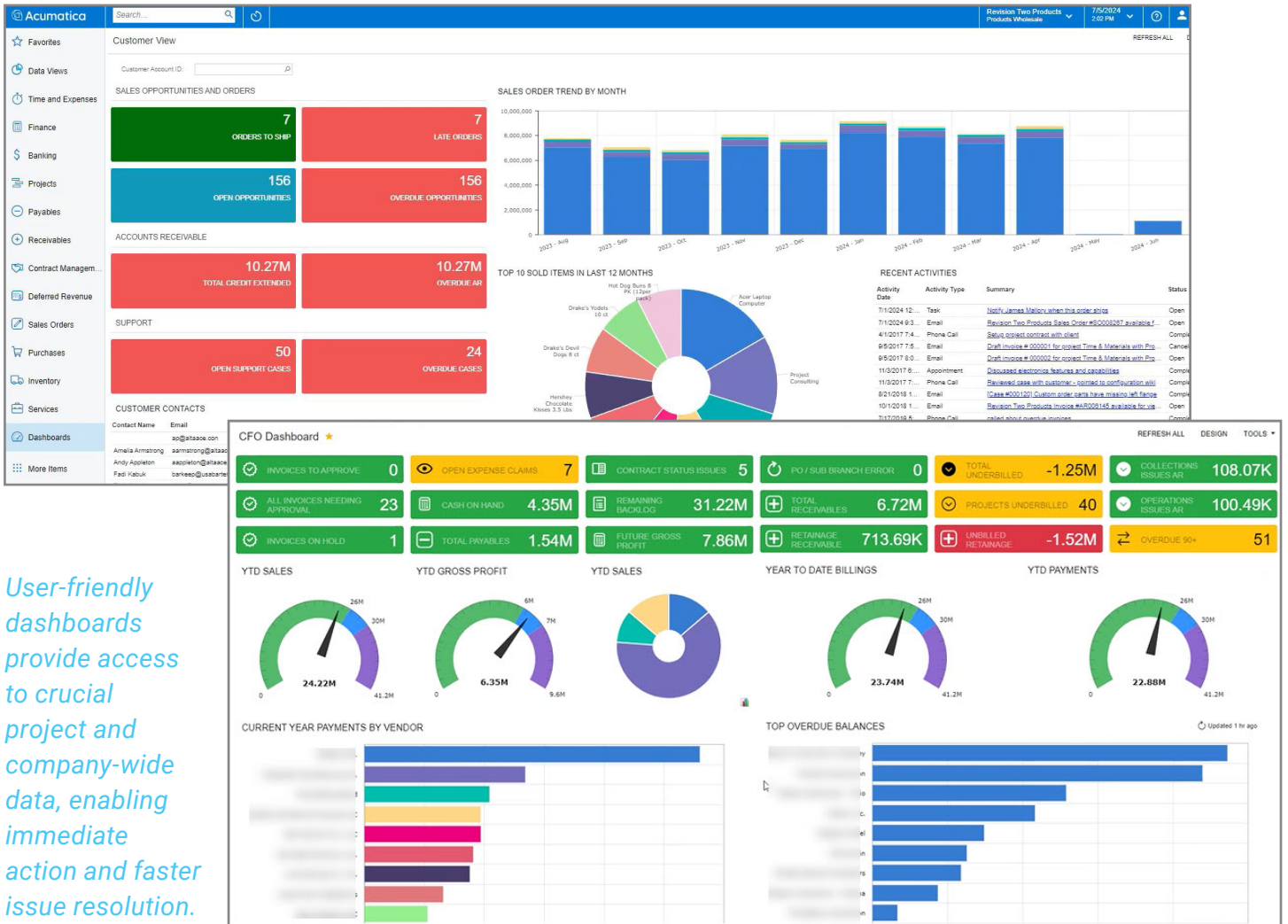
An Innovative Cloud Platform Ready for Modern Technologies

Today's professional service industry demands an ERP platform that ensures scalability and personalization. The ability to integrate new technologies that facilitate growth without extensive IT costs is essential for companies to gain the competitive edge they need to thrive in today's environment.

The Acumatica cloud platform is a versatile architectural framework and application development platform that empowers companies to tailor the software to the way they do business. Acumatica's open architecture provides open APIs, protocols, and tools organizations need to continually incorporate new capabilities into their

platform without disrupting other functions. Machine learning and artificial intelligence automate manual tasks and streamline processes. Low-code or no-code development tools let organizations easily incorporate third-party applications and modern technologies into their ecosystem.

Personalized settings promote an intuitive experience for each user. Customizable reports and dashboards put KPIs and deadlines on top of each user's list of priorities. On-the-go mobility enables users to complete their work wherever they are and enjoy the same intuitive experience regardless of the device.



User-friendly dashboards provide access to crucial project and company-wide data, enabling immediate action and faster issue resolution.

The Trusted Leader in Usability, Mobility, and Value

Acumatica's [Customer Bill of Rights](#) protects customers with an easy-to-understand End User License Agreement. It guarantees ERP implementations without hidden fees. The Bill of Rights outlines Acumatica's commitment to consumption-based licensing that does not inhibit growth. It provides sustainable pricing models with limited price increases, deployment choice, and consistent customer service access. It also protects customers' access to their data, so they can retrieve it at any time.

Further, Acumatica is consistently [rated high](#) in both usability and value by industry analysts and users. Acumatica was recognized by G2 for Best Relationship, Project-Based ERP, Summer 2024, and Best Estimated ROI, Summer 2024. Acumatica also received the highest honors in the Best ERP Solution CODiE award for 2024.

In addition, Acumatica continues to earn TrustRadius awards, most recently the TrustRadius Top Rated badge. Acumatica also rates consistently high with Nucleus Research and is a Leader in the G2 Mid-Market Grid Report for ERP Systems. Acumatica maintains a near-perfect Overall User Rating on the Gartner Peer Insights report.

"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 CHIEF
OPERATING OFFICER,
M3 TECHNOLOGY GROUP

[LEARN MORE >](#)



Acumatica by the Numbers:	10,000+ Valued Customers	+32 High Net Promoter Score
	200M Transactions Every Month	290 Global ISVs
	95% Retention Rate	350+ Channel Partners
	650+ Dedicated Employees	1 Unique Singular Product Focus

How to Calculate Your Return on Investment.

[CALCULATE YOUR ROI](#)



Having opportunities in CRM gives us visibility into the sales project pipeline where we can see in real-time what's close to closing as well as what's in the pipeline.”

Brian Rowerdink, Controller, Security Solutions
Industry: Security Services



Acumatica

The Cloud ERP

Acumatica Cloud ERP is a comprehensive business management solution that was born in the cloud and built for more connected, collaborative ways of working. Designed explicitly to enable small and mid-market companies to thrive in today's digital economy, Acumatica's flexible solution, customer-friendly business practices, and industry-specific functionality help growing businesses adapt to fast-moving markets and take control of their future.

For more information on Acumatica, visit
www.acumatica.com

THE ANSWER COMPANY



About The Answer Company

For the past 30 years, The Answer Company ERP consulting group has been a leader in transforming businesses with technology. By partnering with us, you gain access to a team of nationwide experts who understand the complexities of your industry and have a proven track record of delivering impactful results.

As Acumatica's #1 Canadian VAR partner, we help architecture, engineering, and construction firms optimize operations and improve project management with Acumatica Professional Services Edition. Our tailored ERP solutions offer real-time visibility, streamlined workflows, and better project control—so your team can focus on delivering exceptional projects.

Acumatica Professional Services Edition's cloud-based ERP platform offers the flexibility and scalability needed to grow your business while our dedicated team supports you every step of the way. With enhanced collaboration, precise financial management, and actionable insights, we help you stay on time, within budget, and ahead of the competition.

For more info, visit: www.theanswerco.com

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