

# Customer Roundtables

Acumatica Product Marketing Team

Acumatica  
Summit 2019

Collaborate • Innovate • Accelerate

Jan. 27 – Feb. 1 • Houston, TX



## THIS IS AN INTERACTIVE SESSION - NOT A PRESENTATION

The session should last 90 minutes

We have the room for two hours

You will have enough time not to feel rushed

Open to all – current & future customers & partners

## HERE YOU WILL

Meet others who have similar interests and challenges

Hear how they are utilizing Acumatica

Ask questions and get advice from others with experience

Learn about ISV solutions that may be useful to you

# THERE WILL BE 3 DISCUSSION PERIODS

## Networking

Getting to know the others at your table

## Solution Adoption

Your experience with implementing and using Acumatica

## Product Discussion

Your ideas and thoughts about Acumatica

## BY SHOW OF HANDS

### CURRENT CUSTOMERS

Less than a year

Between 1-3 years

More than 3 years

Selling and implementing partners (VAR's)

3rd-party extension partners (ISV's)

Acumatica Guests

# YOU MAY BE CHANGING TABLES FROM WHERE YOU ARE SITTING NOW

Tables will be discussing different topics

On the next slide there will be a list of topics to choose from

We will be asking which table is of primarily interest to you

The Acumatica hosts will direct you to that table

It is best that **people from the same company sit at separate tables** to get different points of view

**As discussions progress, you are free to move to a new table if you wish**

<b>Roundtable Topics</b>	<b>Possible Subjects – Please feel free to expand at your tables</b>
Cross Industry	GL, AP, Fixed Assets, Inter-company, financial reporting
Sales Management	Billing, Account Receivable, Deferred Revenue, Recurring Revenue, Cash, CRM
Purchasing & Inventory	Requisitions, Purchasing, Approvals, Warehousing, Barcoding
Customer Management	Contact Management, Sales and Marketing Automation, Service and Support Automation, HubSpot or Salesforce integration
eCommerce	Websites, marketplaces, fulfillment, portals
Field Service	Service orders, dispatching, scheduling
Manufacturing	BOM, routing, costing, MPS, MRP, production scheduling, advance planning
Construction	Project Costing, field reporting, A/P & retention, compliance ...
Platform	Implementation & integration, mobile apps, modifications, upgrades

# Part 1: Networking at Your Tables



Your name

Your company

Name

Location

Product and/or services

Software

How long have you been using Acumatica?

What other ERP products have you used in the past?

Summits

How many Acumatica Summits have you attended?

What was your primary reason for attending Summit 2018?

What currently is your biggest objective or business need that you are working on?



# Part 2: Solution Adoption Sharing



## Acumatica

What applications have you implemented?

What applications are you planning to implement?

What 3<sup>rd</sup>-party (ISV) solution do you use?

What are your adoption

Hints?

Recommendations?

Surprises?

**Be Prepared!!!**  
**Someone in your group**  
**may be asked to share**  
**with the larger group.**

The background of the slide features abstract, hand-drawn style lines in various shades of blue and green. These lines form organic, flowing shapes that resemble stylized waves or perhaps a map of a coastline. The lines are of varying thickness and some have small dots or markers along their paths. The overall aesthetic is clean and modern, with a focus on geometric and organic forms.

**What Were Some Of The Table's**

**Hints?**

**Recommendations?**

**Surprises?**



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# Part 3:

## Acumatica Product Discussion



## FOR YOUR CURRENT ACUMATICA SOLUTION

If there is one thing that would help you in streamlining your business processes, what is it?

**Requesting one volunteer  
at each table take notes of the  
discussion.**

**At the end of the discussion we will  
ask you to share with the group.**

## Discussion Topics to Consider

Biggest surprise (positive or negative)

Top one or two features of Acumatica or an ISV solution we use the most and recommend to everyone

Top feature currently in the product I would like fixed

Top one or two features I would like to see Acumatica add



**WHAT WERE SOME  
OF THE SUGGESTIONS  
THAT ROSE TO THE TOP?**



# Suggested Actions



# #1

## Take Advantage of the Customer Portal

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The screenshot shows the Acumatica Customer Portal homepage. At the top right, there are links for 'Support' and 'Product'. A red box highlights a sidebar on the left containing 'Quick Links', 'Product Links', 'Training Links', and 'Support Links'. The main content area features a 'Register for Your Specific Track & Training Courses at Acumatica Summit 2019' banner with a 'Register Now' button. Below this are sections for 'Acumatica News' (listing updates like 'Form 1099 Update' and '2018 R1/R2 Upgrade Readiness'), 'Acumatica in Social Media' (showing tweets about GDPR and password security), and a 'Quick Links' section with icons for 'Calendar of Events', 'Subscribe to Newsletter', 'Download Acumatica', 'See/Share Product Ideas', 'Acumatica Open University', 'Job Aids', and 'Support Links'.

Acumatica  
The Cloud ERP

Support Product

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Register for Your Specific Track & Training Courses at Acumatica Summit 2019

Register Now >

Quick Links

- Calendar of Events
- Subscribe to Newsletter

Product Links

- Download Acumatica
- See/Share Product Ideas

Training Links

- Acumatica Open University
- Job Aids

Support Links

Acumatica News

- Form 1099 Update: 1099-Misc Form Update for 2018
- Upgrade Planning: 2018 R1/R2 Upgrade Readiness
- Support Policy: Product Lifecycle Policy Update
- MVP Nominations: Nominate candidates for Acumatica MVP program
- Summit 2019 Customer Track

Acumatica in Social Media

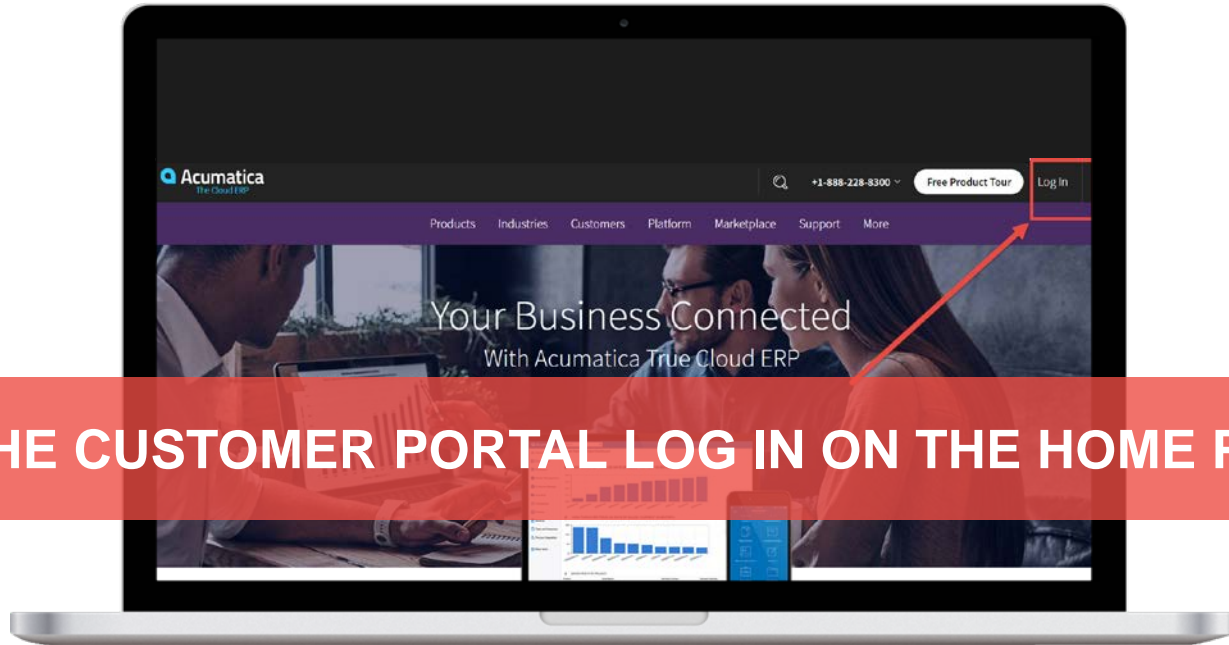
Tweets by Acumatica

Acumatica @Acumatica

Small business owners admit they are still 'clueless' about GDPR. acumatica.ca/2Gkx7i SMBs have enough to worry about without trying to figure out compliance with GDPR. We have a solution! acumatica.ca/2GfJk5k

GDPR

Why Your Business Should Be Wary of Password Spray Attacks acumatica.ca/2SDuDbn One way to



**USE THE CUSTOMER PORTAL LOG IN ON THE HOME PAGE**

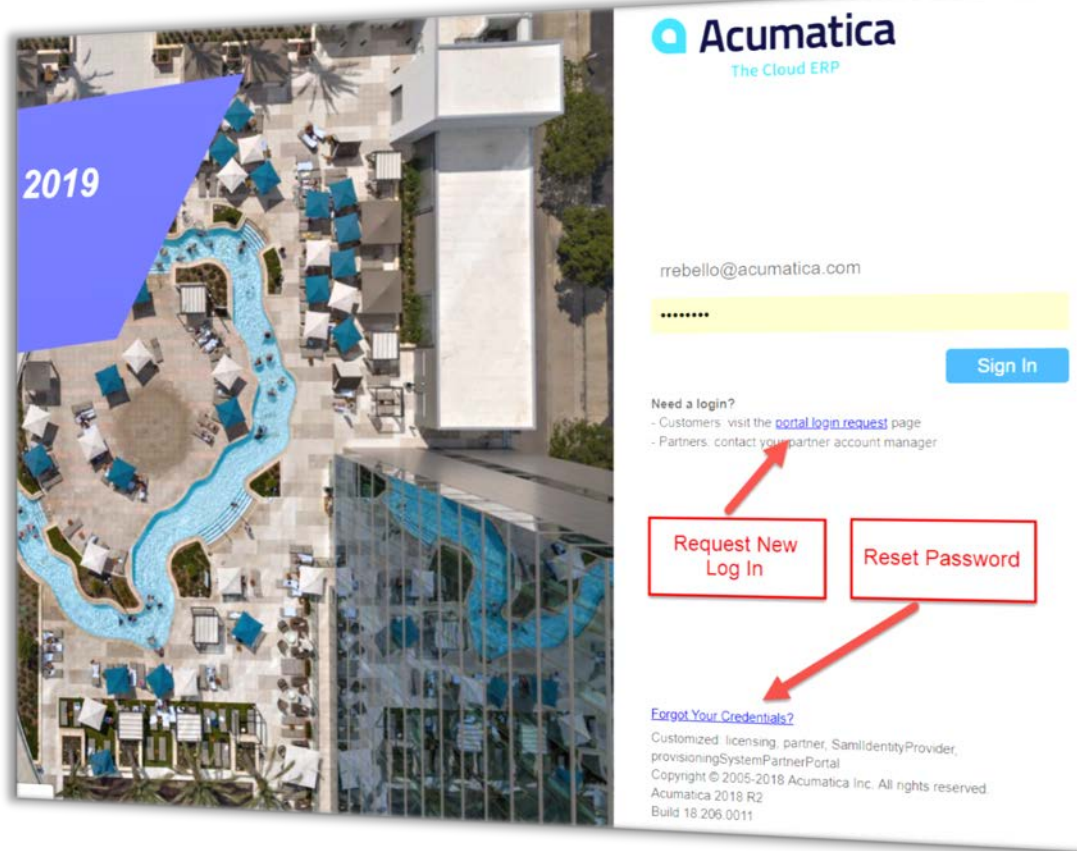
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If you  
need help  
getting on  
the  
Customer  
Portal

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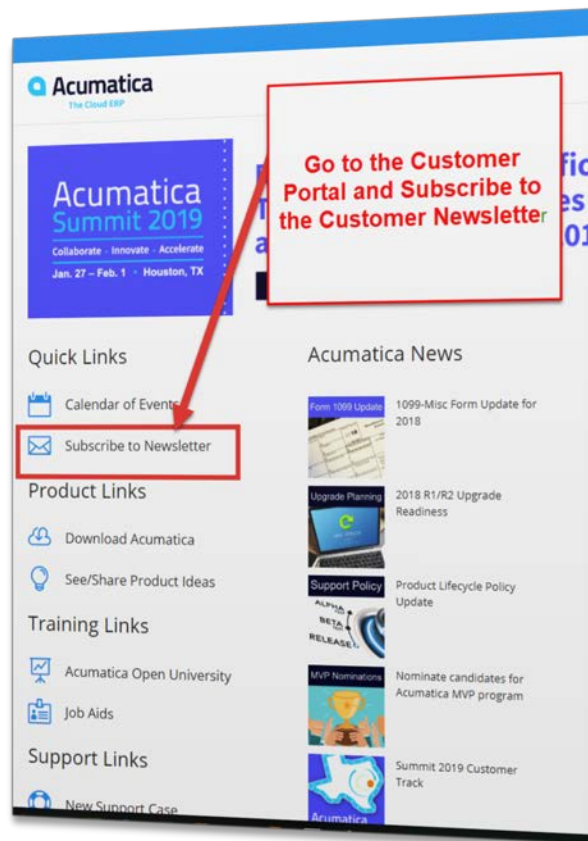
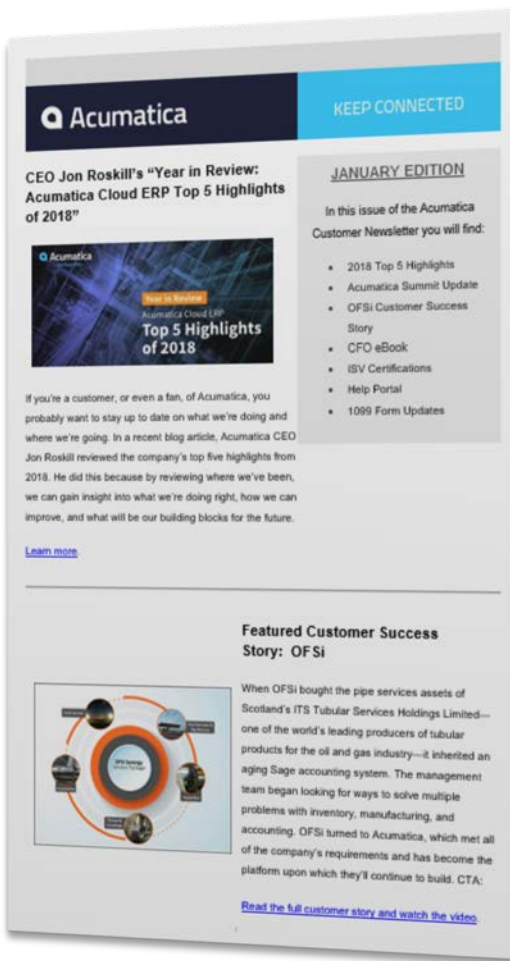


# #2

## Read The Monthly Customer Newsletter

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# #3

## Summit your Ideas for Acumatica:

[feedback.acumatica.com/](https://feedback.acumatica.com/)  
Search / Add An Idea / Vote

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**Acumatica**  
The Cloud ERP

### Ideas for Acumatica

Important! Please note that we do not reply to all messages, but we do read them, analyze them, and work to improve Acumatica based on the feedback we receive.

This portal is for product ideas and feedback only. If you need customer service assistance, please contact your Acumatica Support Partner or submit a support case. You can also get assistance from community resources: [LinkedIn Group](#) or [StackOverflow](#)

No Reliance: Information is maintained on a best-efforts basis and may be changed without notice. Acumatica cannot guarantee the accuracy of the information provided or guarantee completion of features/ideas described on this portal.

[Add a new idea](#)

[Recent](#) [Trending](#) [Popular](#)

Search ideas

**FILTER BY STATUS**

- Outstanding feedback 96
- Future consideration 433
- Shortlisted 40
- Planned 54
- Shipped 131
- Rejected 56
- Already exists 61

**FILTER BY CATEGORY**

- Construction 14
- Contracts 13
- CRM 102
- › Distribution 369
- › Field Service 29
- › Financials 346
- Help and Training Materials 5
- ISV Solutions / 3rd Party Integrations 17

**7**  
VOTE

#### Add possibility to order customization plugins

It would be very helpful to be able to define an execution order for the customization plugins during the publishing process. There may be direct or indirect dependencies between plugins, as the solution grows. This would be similar to the order d...

Created 3 days ago by Coman Mihal  
Customization Tools

1

**3**  
VOTE

#### Import default Report template into Report Designer

When creating a report or modifying existing reports for clients it is not uncommon to have to modify fonts, colors, etc. Currently the default templates need to be updated on the server that Acumatica runs on. It would be a great help if when m...

Created 1 day ago by Rick Baccari  
Report Designer

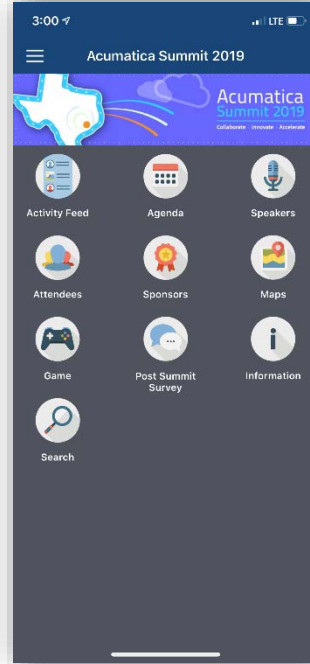
0

**2**  
VOTE

#### Transaction records reflect reclassified batch information instead of pre-reclassified information

When a transaction/record has been reclassified, it would be nice if the originating transaction reflected the reclassified financial information with a reference to the old classification instead of the other way around. This is especially help...

# Event App



Utilize our event app!

**Key features:**

- Network with attendees
- Plan your agenda and activities
- Interact with sponsors
- Provide session feedback

Search/Download for  
CrowdCompass from  
the App store

Login using your email address  
you used to register





# Participate in Expo Treasure Hunt for a chance to win!



Pick up your  
Treasure Hunt Map  
from the Acumatica booth



Visit each exhibitor's table  
on your card and collect  
a sticker with their logo



Fill your card and drop it at Acumatica's booth  
to enter our raffle (don't forget your name and email!)



Winning prize is a Mixed Reality Headset

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Solutions  
Showcase  
Treasure Hunt

Welcome to the Solutions Showcase!  
Gather initials from representatives at each booth, fill out  
your name and email, and return this card to the Acumatica  
booth for a chance to win a mixed reality headset.

BOOTH		BOOTH	
<input type="checkbox"/> CENTURY BUSINESS SOLUTIONS	201/202	<input type="checkbox"/> EAZYSTOCK	224
<input type="checkbox"/> SKYNAMO	203	<input type="checkbox"/> CLIENTS FIRST BUSINESS SOLUTIONS	225
<input type="checkbox"/> NEXVUE/RENTAL360	204	<input type="checkbox"/> PACEJET LOGISTICS, INC.	226
<input type="checkbox"/> ARTSYL DOCUMENT IMAGING	206/206	<input type="checkbox"/> V-TECHNOLOGIES	227
<input type="checkbox"/> KENSUM	207/208	<input type="checkbox"/> BIGCOMMERCE	228
<input type="checkbox"/> PAVA	209/210	<input type="checkbox"/> FUSION	229
<input type="checkbox"/> TRUECOMMERCE	211	<input type="checkbox"/> VERTEX	230
<input type="checkbox"/> SCANCO	212	<input type="checkbox"/> HIGHJUMP	231
<input type="checkbox"/> PAPERLESS ENVIRONMENTS	213	<input type="checkbox"/> SWK TECHNOLOGIES	232
<input type="checkbox"/> VAYPAY	214	<input type="checkbox"/> SPIS/NA/PRODOC	233
<input type="checkbox"/> CRITERION	215	<input type="checkbox"/> NETSTOCK	234
<input type="checkbox"/> SADDLEBACK LEATHER	216	<input type="checkbox"/> APS PAYMENTS	235
<input type="checkbox"/> B2BIGATEWAY	218	<input type="checkbox"/> IBS	236
<input type="checkbox"/> CELIGO	219	<input type="checkbox"/> DATASELF	237
<input type="checkbox"/> MERCHANT E-SOLUTIONS	222	<input type="checkbox"/> WORKFORCEGO	238
<input type="checkbox"/> AVALARA	223	<input type="checkbox"/> SOURCECAY	239



# Connect with Acumatica!



Visit the Acumatica team in the booth located in the Expo next to escalator



Tell the world what you're learning at Summit

And how much fun you're having in Houston!



Join the conversation



#AcumaticaSummit



# Thank You!

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For more information, please visit:

<https://acumatica.com>

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