

# From Good to Great

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Acumatica  
Summit 2019

Collaborate • Innovate • Accelerate

Jan. 27 – Feb. 1 • Houston, TX



# Topics



Project Management



Why Update / Release Cycle



Getting most from updates



Work with your Partner



Question and Answer



# Project Management



When should this start?



When does this end?

# Exercise



Pick three whole numbers between 1 and 9

Write three numbers next to each other, largest first and smallest last, to form a 3-digit number

Create a new 3-digit number by reversing the digits

Subtract lower(smaller) 3-digit number from the upper (largest) 3-digit number

Add up the three digits of the number resulting from subtraction

# Key tasks



Communication



Project Plan



Post Go-Live

# Communication Plan



## Who will you communicate with?

- Customer Project Leader
- Senior Management
- Project Team



## Tools to Communicate

- Recurring Status Meetings
- Shared Site (SharePoint, Base Camp, Smart Sheet, etc..)
- Email / Status Report



## Bidirectional

- Customer Project Leader
- Senior Management

# Project Plan



## Setting Proper Expectations

- Reset Expectations
- Clear Defined Goals
- Change Management



## Project Schedule

- Excel, Smart Sheet, Confluence / Jira, etc..
- Critical Go-Live

# Post Go-Live



## Post Go-Live

- Celebrate
- Survey's
- Stay in contact continue to build the relationship



# Implementation Tools



Project Budget



Check Lists



Design Documents



Status Report



User Acceptance Sign-Off

# Acumatica Updates



# Why updates are so scary

Changes we don't understand slow us down

- Change can be disruptive
- Something working before does not work the same way as before

It takes time to learn about changes

- We don't have time (time=money)

Breaks (things that worked, stopped working)

- Projection of prior bad experience
- We remember extremes (with ERP extremes are rarely good)

# Why updates are so scary

Upgrades can be costly

- Setting up sandboxes
- Training on changes
- Project Management
- Unpredictability
- Getting users to test their processes (UAT)
- Circular nature of process when things go wrong

# Risks with staying on old version

## High severity fix available only in supported version

- **Unscheduled Upgrades**
- **Result in Business Disruption**

## Lack of support

- **You are the minority on old version**
- **Scarce Support resources with working knowledge of old versions**
- **Lack of community collaboration**
- **Troubleshooting on old versions is a challenge**

# Risks with staying on old version

## Security threats

- Vulnerabilities put your business at risk
- Outdated software is more likely to be exploited by cyber criminals

## Compliance

- ISO27001, SOC 1/SOC 2 are issued based on latest software

## Technology Debt

# What is technology debt

Upgrade = Pain

- Instinct is to avoid pain

Putting off updates defers the cost of doing the upgrade (Debt)

Adds on additional costs of dependency (Interest)

Over time, the (Debt + Interest) grows exponentially with every deferral (Compounded Interest)

Large Technology Debt = can't afford to upgrade

- Customer Attrition / Change of software (**Bankruptcy**)

# Overcoming update fears

## Smaller, more frequent upgrades

- Less change, less impact
- Less effort -*avoid Technology Debt*
- Inherently less scary

## Technology advancement

- Backward compatibility philosophy
- Binary compatibility testing
- ISV Solution Certification



# Overcoming update fears

Stronger communities are built when everybody on same version

SaaS subscriptions include many costs associated with upgrades

- Preview sandboxes, upgrade monitoring and execution

Updated versions are more feature rich

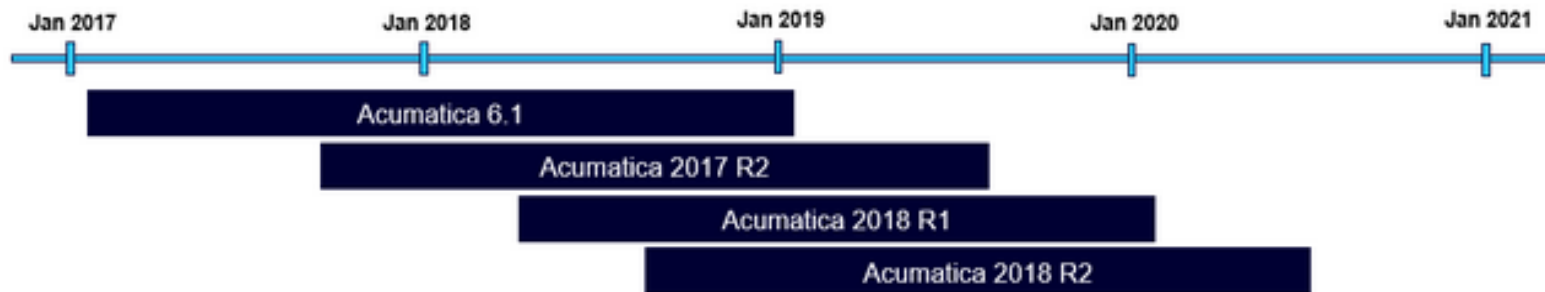
- Can lead to improved productivity and growth opportunities
- Encourages review of current business

# Acumatica Release Cycle



# Upgrading Acumatica (PCS/PCP)



Supported Releases	Initial Release	Expected Retirement
Acumatica 6.1	Jan 31, 2017	Jan 31, 2019 (previously Oct 16, 2018)
Acumatica 2017 R2	Oct 9, 2017	Jul 31, 2019
Acumatica 2018 R1	Mar 19, 2018	Jan 31, 2020
Acumatica 2018 R2	Sept 19, 2018	Jul 31, 2020



# Support releases

## Update Preferences

Revision Two HQ ▾ Update Preferences ★

### UPDATE SETTINGS





☒ Use Update Server


Update Server Address:

☐ Check for Updates

### STORAGE SETTINGS


Storage Provider:  🔍


  RELOAD PARAMETERS  

 Name	Value
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# Upgrading in Acumatica

## Apply Updates

 Revision Two HQ ▾ Apply Updates ★

 REPAIR DATABASE RESTART APPLICATION SCHEDULE LOCKOUT

Current Version: 17.202.0016

Last Update Date: 12/6/2017 2:53 PM


UPDATES

UPDATE HISTORY

Major Version:

All Versions ▾



Restriction Key:


 UPLOAD CUSTOM PACKAGE

DOWNLOAD PACKAGE

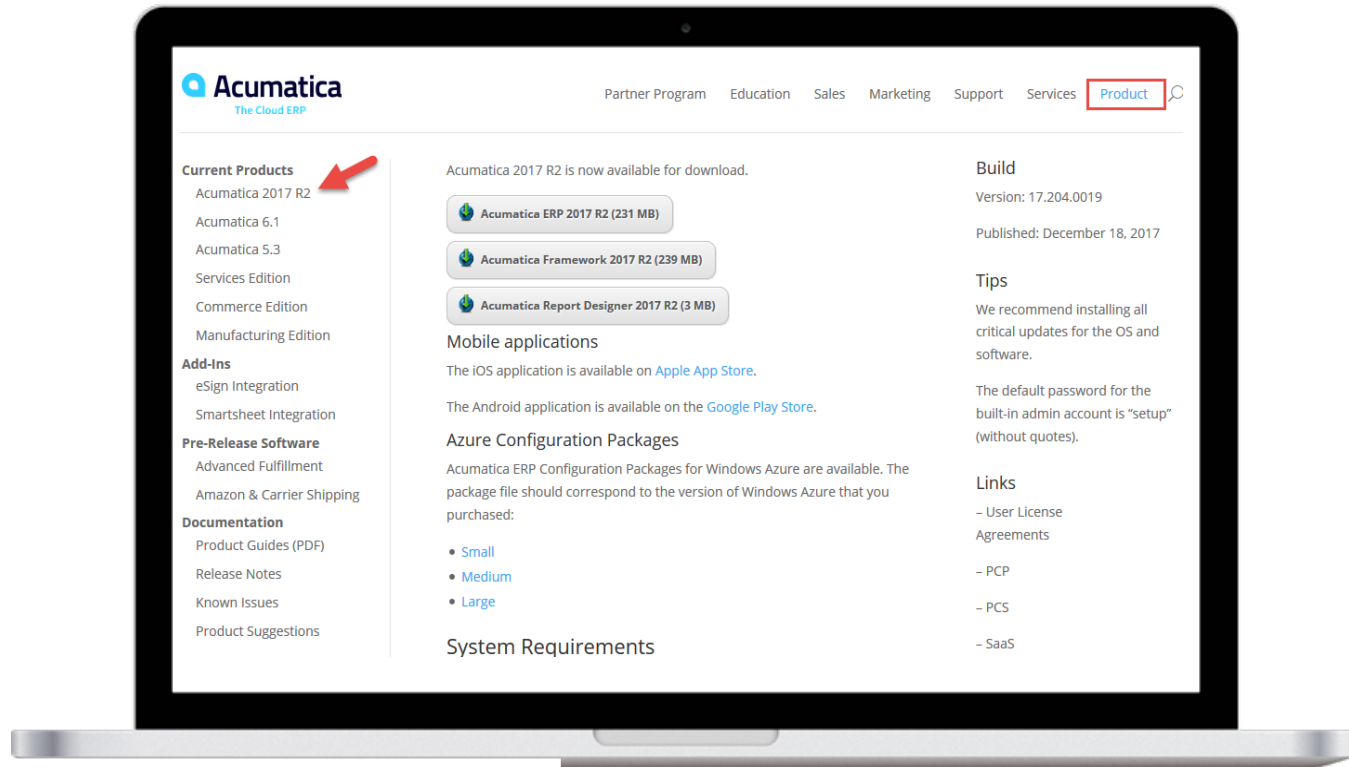
INSTALL UPDATE

VALIDATE CUSTOMIZATION

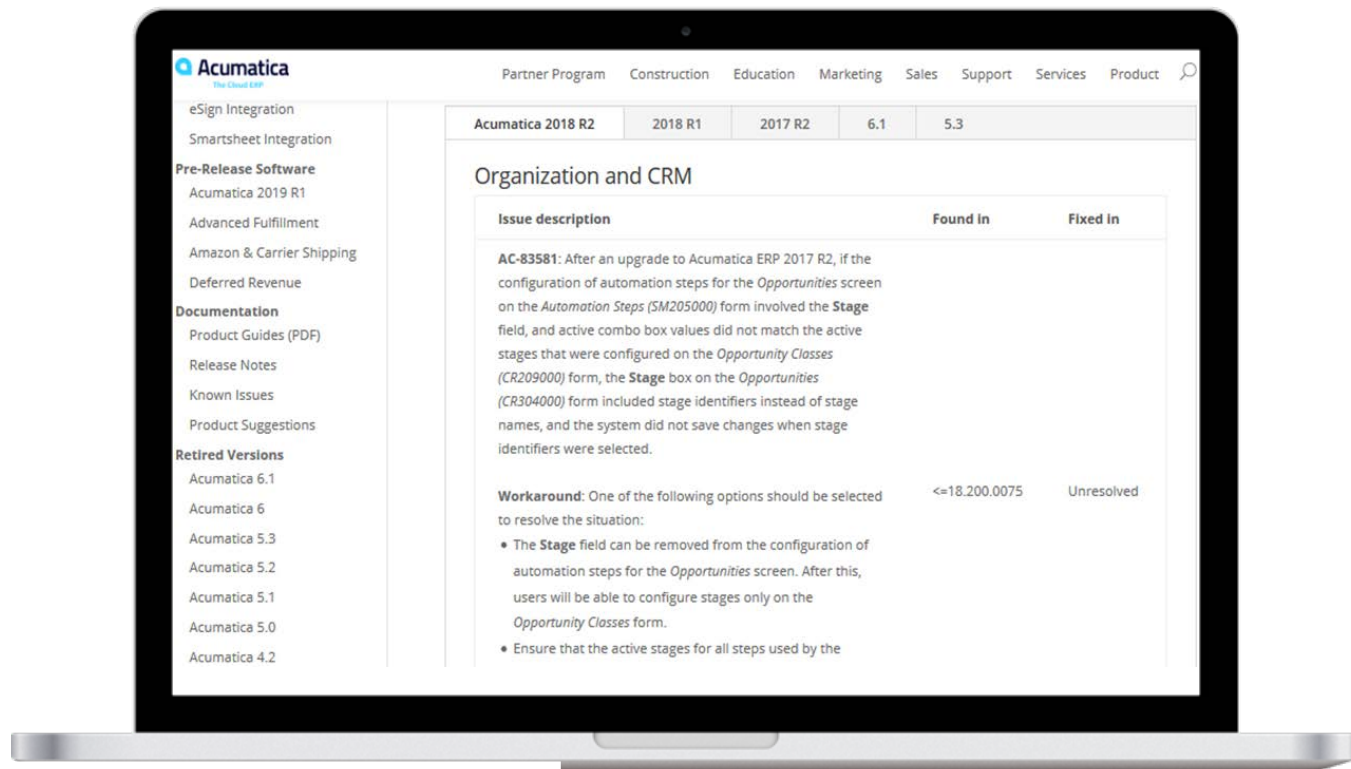
 

	Version	Published Date	Restrict	Ready to Install
▸	17.204.0019	12/15/2017 5:30 PM	<input type="checkbox"/>	<input type="checkbox"/>
	17.203.0029	11/30/2017 7:25 PM	<input type="checkbox"/>	<input type="checkbox"/>

# Portal downloads



# Known issues page



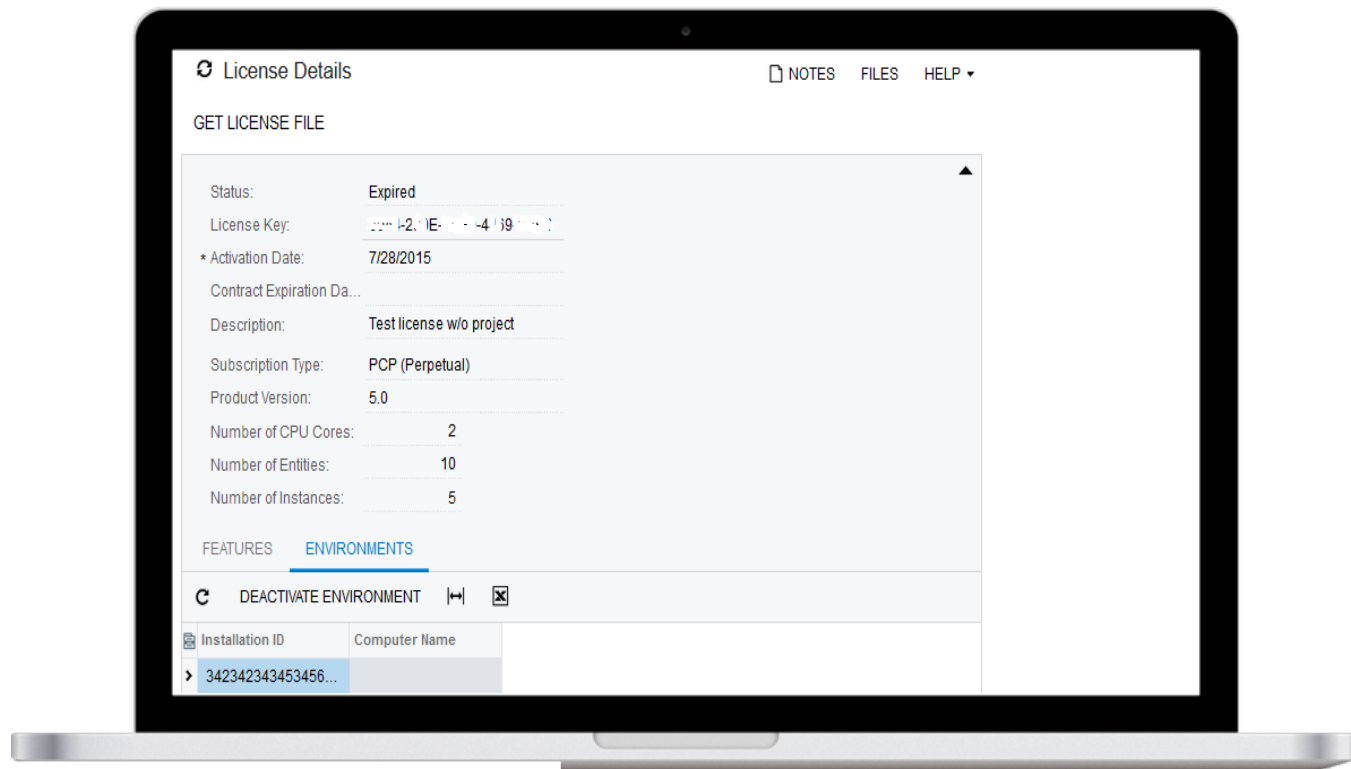
# Your license keys

The screenshot displays the Acumatica user interface. At the top, the navigation bar includes links for Partner News, Account, and Logout. Below this, the main header shows the Acumatica logo and a navigation menu with options like Partner Program, Education, Sales, Marketing, Support, Services, and Product. The left sidebar contains sections for Account, Finance, and Contracts & Licenses. The 'My Licenses' link under 'Contracts & Licenses' is highlighted with a red arrow. The main content area, titled 'My Licenses', features a search bar for Customer and Contract ID, and a table of licenses. The first license in the table has a license key '30A4-...' which is also highlighted with a red arrow.

Custom Name	*License Key	Descrip	*Activation Date	Contract Expiration Date	*Validation Date	Status	Product Version	Number of CPU Cores
> [icon]	<a href="#">30A4-...</a>	Test li...	7/28/2015	11/14/2022	6/22/2016	Expired	5.0	2
[icon]	<a href="#">4597-...</a>	Test...	11/14/2013	11/13/2014	5/13/2014	Invalid	5.0	4
[icon]	<a href="#">5335-...</a>	Test li...	5/1/2014	4/30/2015	2/24/2017	Expired	6.0	2
[icon]	<a href="#">683E-...</a>	Test S...	5/27/2014	4/30/2015	1/1/2016	Invalid	5.0	2
[icon]	PT Tes... <a href="#">EFF4-...</a>	Test L...	11/14/2013	11/14/2016	11/14/2015	Expired	5.0	2



# Your license keys



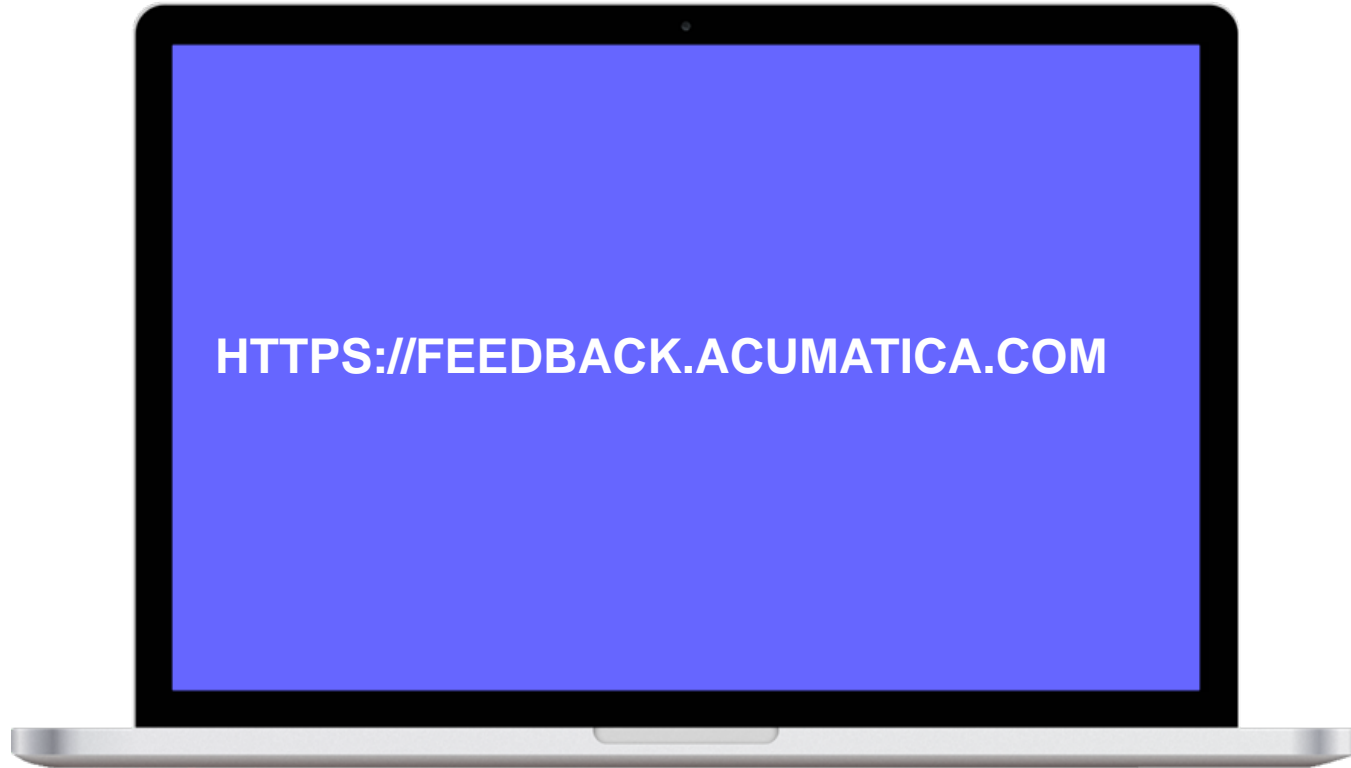
# Working with your partner

Describe potential benefits  
and whether they apply  
to your business

How to improve your business



Submit ideas for Acumatica future releases



# Question & Answers



# We Want Your Feedback



**Please provide your feedback after each keynote, session or training:**

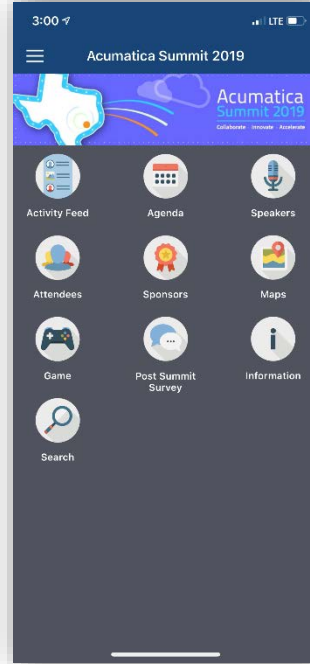
- Access the surveys via the direct link



Let's make some noise



# 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



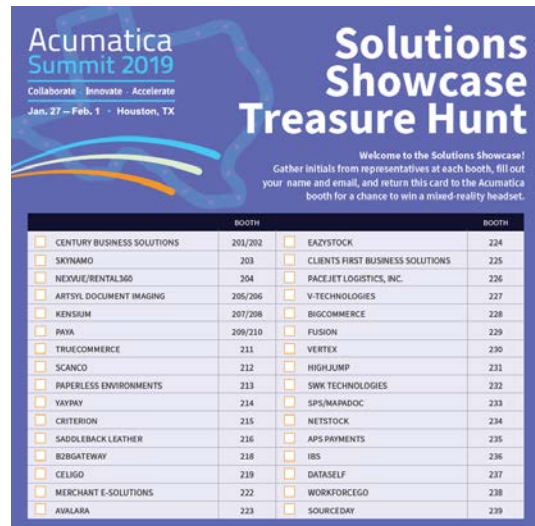
Visit each exhibitor's table  
on your card and collect  
a sticker with their logo



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





# 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





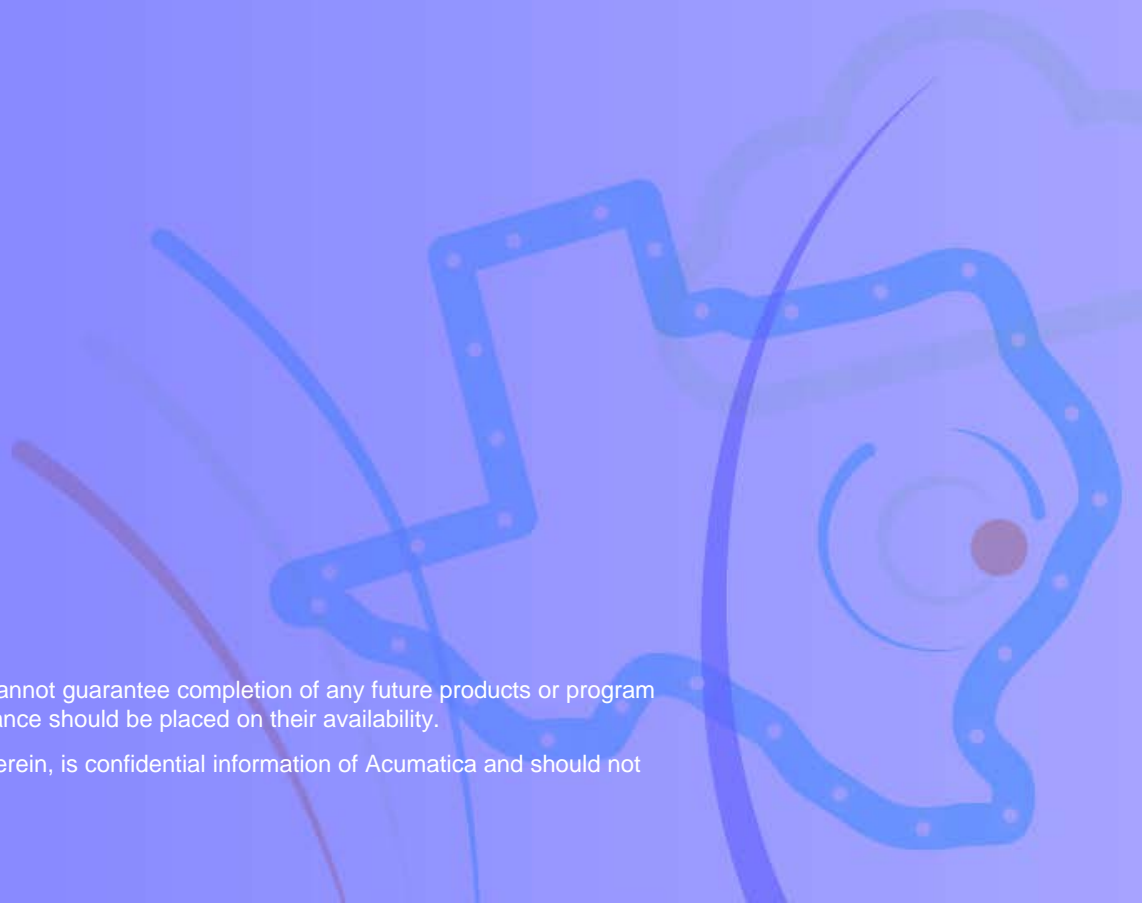
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# Acumatica Summit 2019

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# C101: Acumatica: From Good to Great

Monday, 1:00 – 1:50pm

Learn how to make your Acumatica solution even better. We'll cover creating an implementation plan that works, expanding and enhancing the capabilities of your system, and reducing security risks by keeping your software current.

Level: 100

## Speaker(s)/Facilitator:

Todd Kuhns

## Attendee Outcomes (by attending this session, I will...)

Importance of Project Manager, Understand Technology Debt, release Cycle

## Customer Stories/Case Studies/Demos

## Audience

Customers

## Session elements (map out the components of the session – adjust times to fit)

<i>Minutes</i>	<i>Description</i>	<i>Speakers</i>
5	Introduction	Todd Kuhns
7	Importance of Project Management	Todd Kuhns
7	Key PM Tools	Todd Kuhns
7	Why stay current	Todd Kuhns
7	Understanding release cycle	Todd Kuhns
10	Summary	Todd Kuhns

## Calls to action/Announcements/What's New for 2019

Acumatica Summit 2019

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