

# Professional Services Edition

A modern project-centric solution

“Our operation managers are analyzing their profits and losses much better.”

– Gary Gardner, CEO, [Industrial Specialty Services](#)



## A Complete Business Management Platform for Professional Services

Transform service delivery with a modern, cloud-native ERP built for professional services. Acumatica Professional Services Edition unifies project management, accounting, and resource planning in one connected platform—empowering teams to deliver on time and on budget. Embedded CRM provides a 360° view of client relationships, from proposals to payments. And with a self-service portal, clients can easily access support, track cases, and stay informed—enhancing satisfaction and transparency at every step.

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.



# Empower Everyone with Role-Based Dashboards, Seamless Collaboration, and Intuitive Navigation

Streamline operations and align teams with a single, connected ERP platform designed for modern business. Empower employees to manage daily tasks and strategic goals with ease—using role-based dashboards, configurable workflows, and embedded AI to boost efficiency, enhance client satisfaction, and fuel long-term growth.

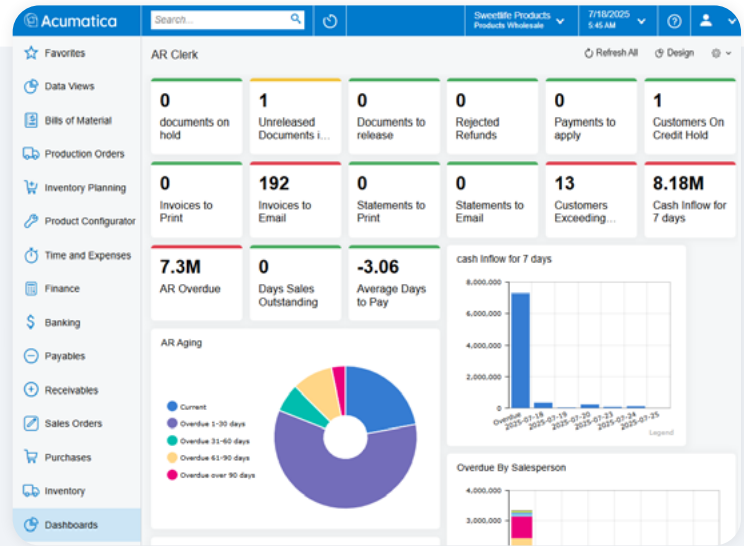






## Financial Management

Simplify accounting, automate invoicing, and ensure accuracy. Make smarter decisions with real-time insights from intuitive dashboards. Streamline approvals and cash management to boost efficiency and reduce errors. Manage expenses, track profitability, and optimize budgets with tools that keep you financially agile and positioned for success.



## Time and Expense Management

Capture time and expenses for projects, services, and payroll with mobile time entry and flexible approvals workflow. Optimize project costing and recover billable expenses faster with real-time data flowing directly into project accounting.

### Time and Expenses

Navigation buttons: New Email Activity, New Expense Receipt, New Expense Claim, Employee Time Card, Equipment Time Card.

- Tasks:** Tasks (+ NEW), Approvals, Events
- Email:** Incoming, Draft, Sent, Outgoing, Deleted, Archived
- Time Tracking:** Employee Time Activities, Weekly Crew Time Entry, Employee Time Cards, Equipment Time Cards, Approve Time Activities, Release Time Activities, Approve Time Activity Summaries, Release Time Cards, Release Equipment Time Cards
- Expense Claims:** Expense Receipts, Expense Claims, Release Expense Claims, Bill Expense Claims
- Inquiries:** Activities, All Emails, Search in Files, Notification for Expense Receipts



## CRM

Automate marketing, accelerate sales, and simplify support with a connected CRM that gives you full visibility into every client interaction. Strengthen relationships, shorten sales cycles, and drive growth through smarter engagement.

Opportunities: OP000385 - Oil services opp

Buttons: Open, ...

Opportunity ID	OP000385	Business Account	ASHOIL - Asheville Oil Co Inc
Status	New	Location	MAIN - Primary Location
Opportunity Class *	PRODUCT - Product Sales ...	Contact	Sheila Phelps
Stage	Qualification	Currency	USD
Estimated Close Date *	2/7/2024	Owner	Anna Johnson
		Description *	Oil services opp

Navigation: ACTIVITIES, DETAILS, ADDITIONAL INFO, QUOTES, CONTACT, ADDRESSES, ATTRIBUTES, TAXES, DIS

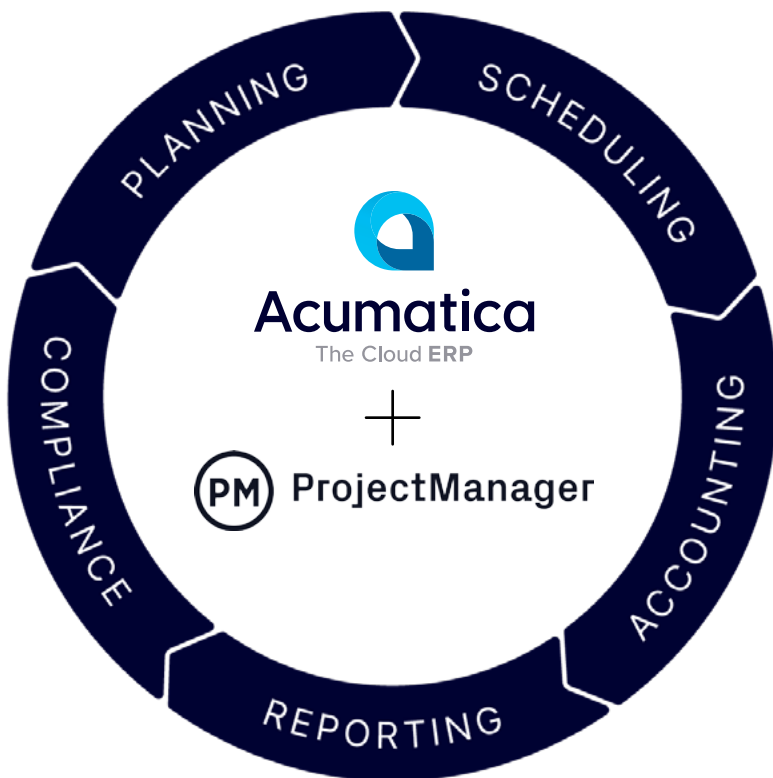
Override:

<b>Contact</b>	<b>Address</b>
First Name: Sheila	Address Lookup



# Native, Bi-directional Resource Planning

ProjectManager, included and fully integrated with Acumatica's Professional Services Edition, delivers advanced project and portfolio management, resource optimization, time tracking, and workflow automation. The native connector ensures real-time visibility, accurate cost tracking, and streamlined resource management—empowering teams with greater transparency and control across every project.



- Billable hours and expenses are synced between both systems
- Cost tracking provides real-time reporting and profitability analysis
- Integrated project costs and time logs simplify invoicing
- Seamlessly update projects in Acumatica with the Project Plan View

10,000+  
Valued Customers

180M  
Transactions  
Every Month

97%  
User Satisfaction  
Rating

700+  
Dedicated  
Employees



# Last-Mile Features Designed for Your Industry

Acumatica allows professional services firms to grow and evolve with a scalable, secure, and mobile platform. Connect every part of your business, from proposals and project management, to field service and finance, in one unified system. Automate workflows, gain real-time visibility, and streamline operations to save time and money. Empower clients with self-service access, ensure compliance, and make better decisions with budget analysis and forecasting.



## 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



## Software and Technology

managed computer and technology services, software implementation and support, AV installation



## Business Services

consulting, business management, advertising, marketing, public relations



## Utilities and Communication Services

electrical, water, solar, energy, telecommunications, and other services



## Surveying Firms

land, building, environmental, engineering, and geological surveyors



## Other Services

staffing, legal, accounting, and other

“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](#)

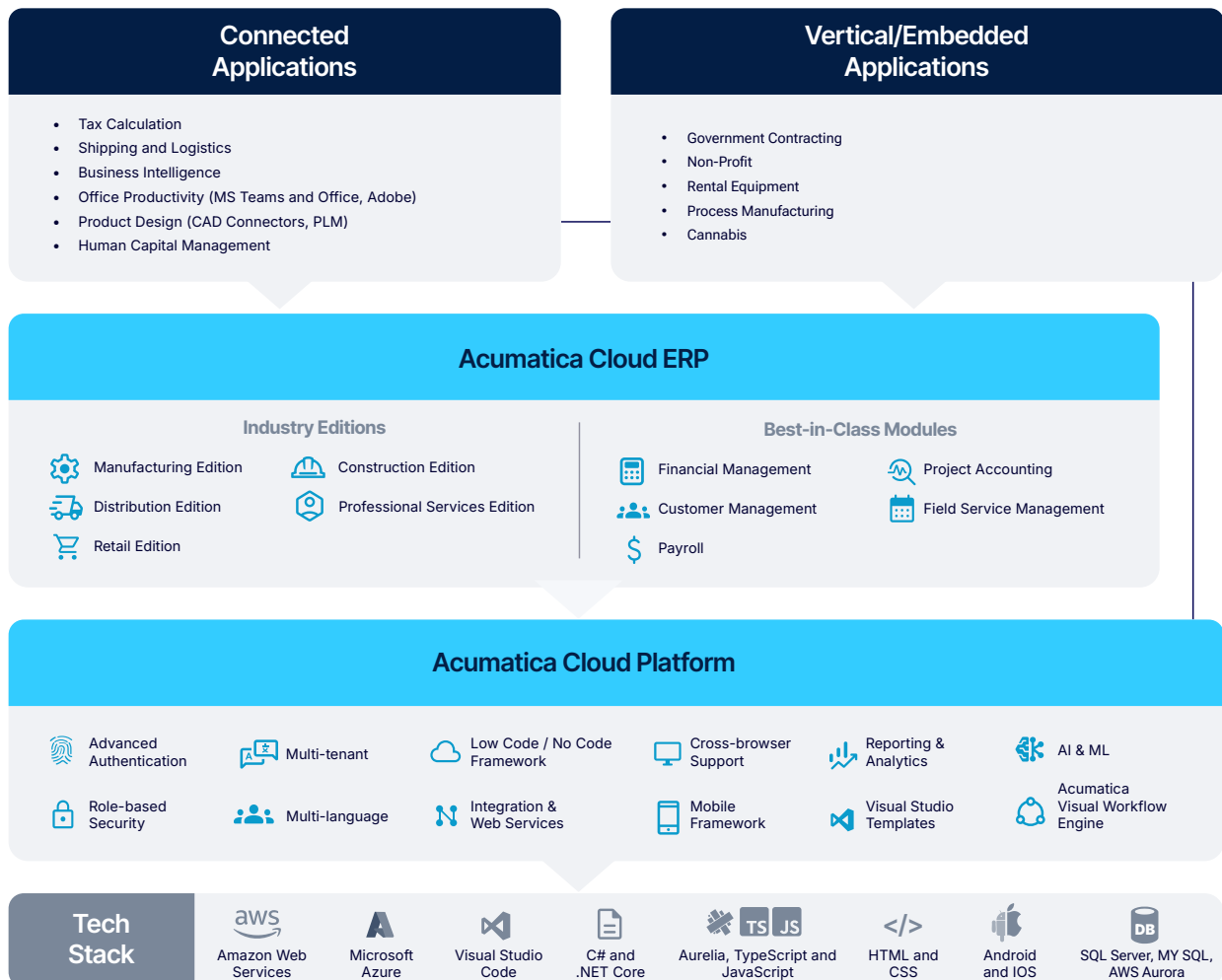


# The Adaptable Acumatica Cloud ERP Platform

The Acumatica Cloud ERP platform is built on the world's best cloud and mobile technology, providing the tools business users need to reimagine an interconnected world.

The architectural framework and application development platform leverage new technologies with user-driven feedback, empowering business users to tailor the system with role-based security and low-code and no-code customization tools for a personalized ERP experience. Developers can easily customize and extend the application to meet unique business and industry requirements.

Acumatica allows users to modify workflows, rearrange screens, customize reports, build dashboards, and tailor the system without writing code. Transform your business, collaborate across departments, and prepare for growth with a business management platform that adapts to your evolving needs.





# Manage your Entire Business with a Modern and Holistic ERP Solution Tailored for Every Need



## Financials

- General Ledger
- Accounts Payable
- Accounts Receivable
- Deferred Revenue
- Recurring Revenue
- Cash Management
- Tax Management
- Bank Feeds
- Fixed Assets
- Payments
- Payroll Management
- Currency Management
- Global Financials
- Multi-Entity/Intercompany
- Time Management
- Expense Management



## Business Insights

- Acumatica Reports
- Generic Inquiries
- Role-Based Dashboards
- Microsoft Power BI
- Business Events



## Wholesale Distribution

- Inventory Management
- Sales Orders
- Purchase Orders
- Purchase Order Requisitions
- Warehouse Management (WMS)
- Distribution Requirements Planning



## Manufacturing

- BOM and Routings
- Production Management
- Material Requirements Planning
- Advanced Planning & Scheduling
- Product Configurator
- Manufacturing Estimates
- Engineering Change Control
- Arena Connector



## Professional Services

- Project Accounting
- Project Management
- Progress and Milestone Billing
- Resource Management
- Contract Management
- CRM Service and Support
- Field Reporting and Mobility
- Time Management
- Expense Management



## Retail & Sales

- Amazon Connector
- Shopify POS Connector
- Shopify Connector
- B2B on Shopify Connector
- BigCommerce Connector
- Sales Orders
- CRM Marketing and Sales
- Customer Portal



## Construction

- Construction Financials
- Cost Projections
- Progress Billing
- Construction Payroll
- Job Cost Accounting
- Project Management
- Field Service
- Equipment Management
- Compliance
- Change Management
- Material Management
- Preconstruction



## Other Industries

- Agriculture, Forestry, & Fishing
- Banking and Finance
- Communications & Utilities
- Educational Services
- Equipment Rental
- Healthcare
- Non-Profit & Membership
- Oil, Gas, and Mining
- Process Manufacturing





# Acumatica – Different by Design

Acumatica is different by design and purposely built to help growing companies thrive in today's digital economy. Our industry-specific business management software features intelligent workflows and market-leading usability that enable companies to manage risk, anticipate disruption, and seize new opportunities. Our principled business practices, growth-friendly licensing, and flexible deployment options put organizations in control of their future.

We recognize that no business succeeds alone, and that's why Acumatica is more than a product—it's a thriving community of partners, customers, and creators committed to delivering technology that enables tomorrow's leading companies to innovate, collaborate, and grow on their terms.

## Customer Bill of Rights



Clear fee structures without surprises



Consumption-based license fees



Always-free educational resources



Adapt and customize to your needs



Freedom to choose partners and providers



Fair pricing without long-term commitments



Own and access your data, now and always



Deployment freedom on a public or private cloud



Comprehensive security for access, data, and devices



Open platform with APIs for rapid integration

+33

Industry-Leading Net Promoter Score

240+

Independent Software Vendors

350+

Global Channel Partners

1

Unique, Singular Product Focus



# Connected Professional Services Apps

**ExakTime**  
An ARCORO Product

**PM** ProjectManager

**ARCORO**  
THE BRIDGE TO BETTER HR

workforce **GO**

**Velixo**



“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](#)

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](http://www.acumatica.com) or follow us on [LinkedIn](#).

 **Acumatica**  
The Cloud ERP



**UMBRELLA**  
CONSULTING

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