

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.





Gain a complete view of all project details.
Track tasks, issues, changes, and cost
projections from one place.

Project Hub

FIXEDP06 - Fixed Price Project - milestone by completed hours

NoteFiles

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CompleteRun Billing...

Project IDFIXEDP06

StatusActive

Start Date *6/14/2018

End Date10/31/2018

Quote Ref. Nbr.

Actual Income1,500.00

Actual Expenses480.00

Margin Amount1,020.00

Margin (%)68.00

Pending Invoi...-1,500.00

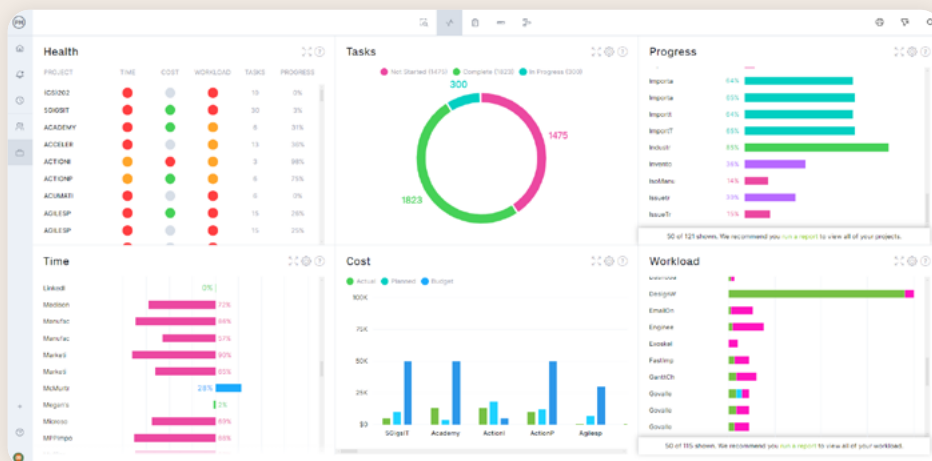
TemplateFIXEDPRICE - Fixed Price Project - ...

Project ManagerEP00000002 - Maxwell Baker

CustomerUPWARDMOBI - Upwardmobility

Budget Curre...USD1View Base

DescriptionFixed Price Project - milestone by completed hours



Ensure resource availability and allocate staff, equipment, and technology by team, department, and timeframe.



Manage budgets across projects, customer accounts, inventory, and other related business processes. Compare actual project costs with original and revised budgets. Recognize revenue based on completion or task progress.

Run Allocations by Projects

Posting Date *

Allocation Rule

Customer

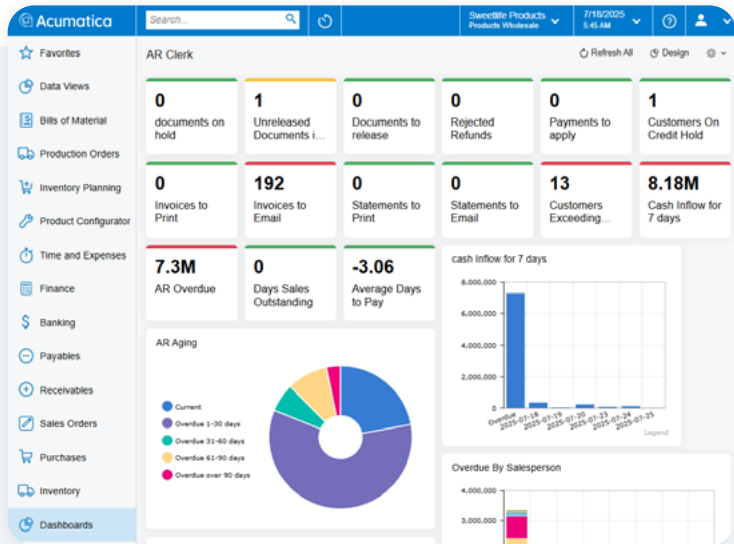
Date Range Restrictions
 From To

Project ID	Allocation Rule	Description	Customer Class
☒ 2017PROG01	☒ COSTPLUS	Cost Plus Project	KEY
☐ BUDGETBYM	☐ CPINT	Cost-Plus internal projects (burden, no po...	LOCAL
☐ CSTRCERTIF	☐ FIXEDPRICE	Fixed Price	LOCAL
☐ CSTRCONCRT	☐ REVREC	Revenue recognition based on revenue b...	KEY
☐ CSTRDEV	☐ REVREC2	Revenue recognition based on incurred e...	LOCAL
☐ CSTR ELEC	☐ TMR	Time & Material	INTL
☐ CSTRHBCUS	☐ TMWIP	Time and Material with WIP	LOCAL
☐ CSTRHOTEL			LOCAL
☐ CSTRMEPJOB			LOCAL
☐ CSTRQTY			LOCAL
☐ CSTRREST		Italian Restaurant - T&M Billing Example	ITALIANCO
☐ CSTRSUB		Eastgate Strip Mall - Subcontractor Job E...	BNRCONTRAC
☐ CSTRWINUP		The Equity Group - window upgrade	EQUGRP



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.

The dashboard includes a navigation bar with buttons for New Email Activity, New Expense Receipt, New Expense Claim, Employee Time Card, and Equipment Time Card. Below this are three main sections:

- Tasks:** Includes a list of tasks (Approvals, Events) and an email section (Incoming, Draft, Sent, Outgoing, Deleted, Archived).
- Time Tracking:** Includes links for 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, and Release Equipment Time Cards.
- Expense Claims:** Includes links for Expense Receipts, Expense Claims, Release Expense Claims, Bill Expense Claims, and a section for 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.

The screenshot shows the 'Opportunities' section for 'OP000385 - Oil services opp'. The form includes fields for:

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

Below the form are tabs for ACTIVITIES, DETAILS, ADDITIONAL INFO, QUOTES, CONTACT, ADDRESSES, ATTRIBUTES, TAXES, and DIS. The 'CONTACT' tab is selected, showing a form for the contact 'Sheila' with fields for First Name, Last Name, and Address.



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.



Smartnumbers | Acumatica Customer



Architectural Firms

design-build/construction management, architectural services



Engineering Firms

civil, electrical, industrial, mechanical, structural



Business Services

consulting, business management, advertising, marketing, public relations



Surveying Firms

land, building, environmental, engineering, and geological surveyors



Safety and Security

security system monitoring, safety management and training



Software and Technology

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



Utilities and Communication Services

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



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](#)

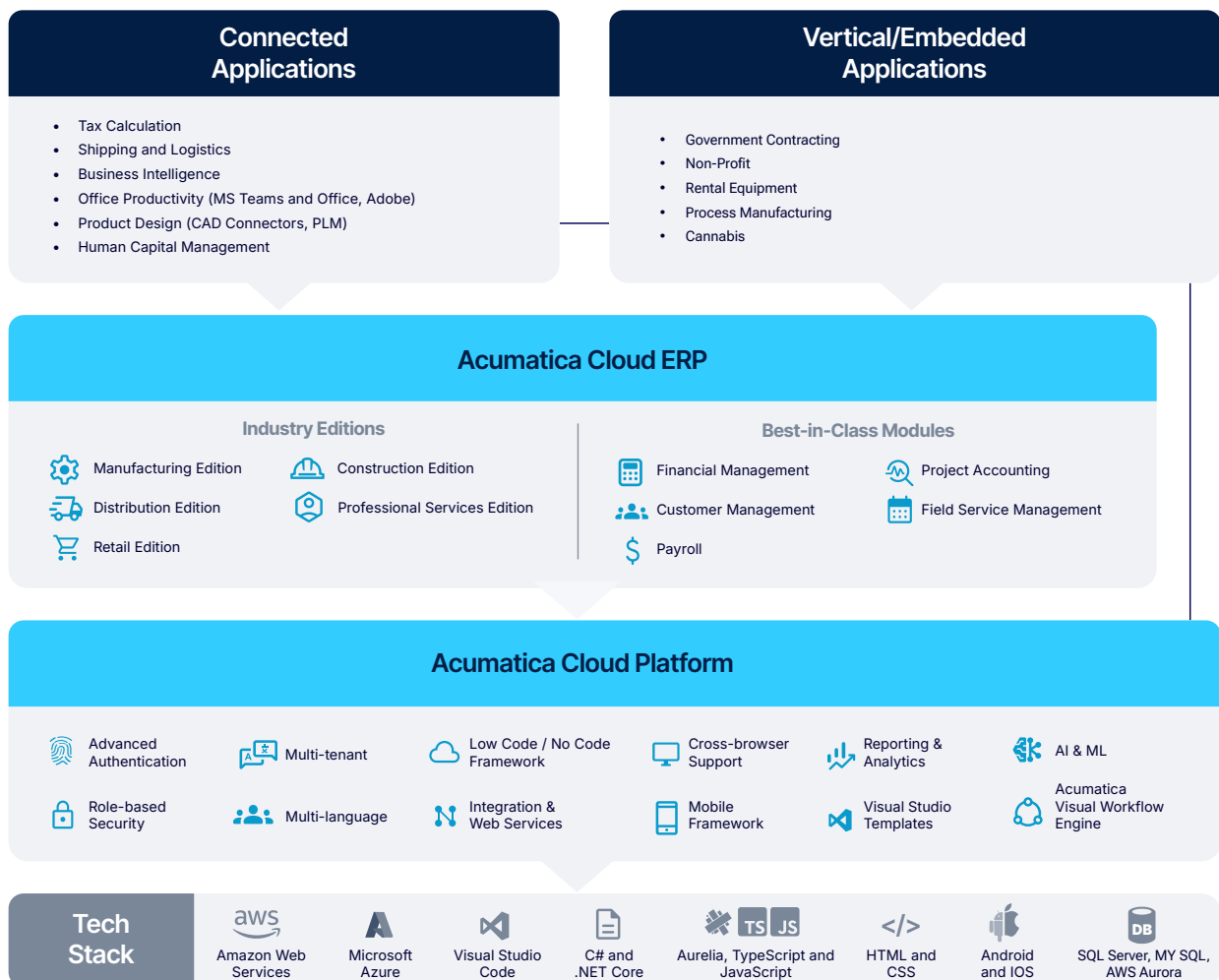


The Adaptable Acumatica Cloud ERP Platform

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

ADP

“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 or follow us on [LinkedIn](#).

 **Acumatica**
The Cloud ERP



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