



We'll get you there.

CPAs | CONSULTANTS | WEALTH ADVISORS

Is Your Business Ready to Advance Beyond QuickBooks? Elevate Operational Efficiency with Acumatica ERP

October 24, 2024



The information herein has been provided by CliftonLarsonAllen LLP for general information purposes only. The presentation and related materials, if any, do not implicate any client, advisory, fiduciary, or professional relationship between you and CliftonLarsonAllen LLP and neither CliftonLarsonAllen LLP nor any other person or entity is, in connection with the presentation and/or materials, engaged in rendering auditing, accounting, tax, legal, medical, investment, advisory, consulting, or any other professional service or advice. Neither the presentation nor the materials, if any, should be considered a substitute for your independent investigation and your sound technical business judgment. You or your entity, if applicable, should consult with a professional advisor familiar with your particular factual situation for advice or service concerning any specific matters.

CliftonLarsonAllen LLP is not licensed to practice law, nor does it practice law. The presentation and materials, if any, are for general guidance purposes and not a substitute for compliance obligations. The presentation and/or materials may not be applicable to, or suitable for, your specific circumstances or needs, and may require consultation with counsel, consultants, or advisors if any action is to be contemplated. You should contact your CliftonLarsonAllen LLP or other professional prior to taking any action based upon the information in the presentation or materials provided. CliftonLarsonAllen LLP assumes no obligation to inform you of any changes in laws or other factors that could affect the information contained herein.

Who We Are

Robert Jacobs

- Digital Growth Director
- Software Solutions
- CLA

Paul Dubuque

- Presales Engineer
- Acumatica



Topics



Why QuickBooks



Why move to ERP



Acumatica ERP demonstration



QuickBooks Strengths

Desktop Online Enterprise

- Simplified financial processes
- Reduce manual errors
- Track inventory and orders
- Start ups and small business
- Low cost of ownership
- Ease of use
- Third party integrations available
- Tiered plans



QuickBooks Limitations

Desktop Online Enterprise

- Supply chain management
- MRP (materials requirements planning)
- Multi-level BOM (bill of materials)
- Production routings
- Multiple costing options
- Lot tracking and tracing
- QMS (quality management)
- Capacity planning
- Advanced reporting
- Multiple DBs/subscriptions (LLCs)
- Stability and help desk service



Polling Question

Which version of QuickBooks are you using?

- Desktop Pro / Premier
- Online
- Enterprise Diamond / Gold / Platinum



Modern ERP

Coverage

- Supply chain, manufacturer production, service
- Control risk management and compliance
- Multi-entity, currency, language

Technology

- Access from anywhere
- Intelligent insights
- Open standards
- Granular security



Benefits of Modern ERP

Accurate
decisions

Enable
growth

Speed to
market

Team
harmony

Minimize
losses

Strength to
compete



Polling Question

Are you considering moving to ERP?

- Not currently
- Next 6-12 months
- Need more information



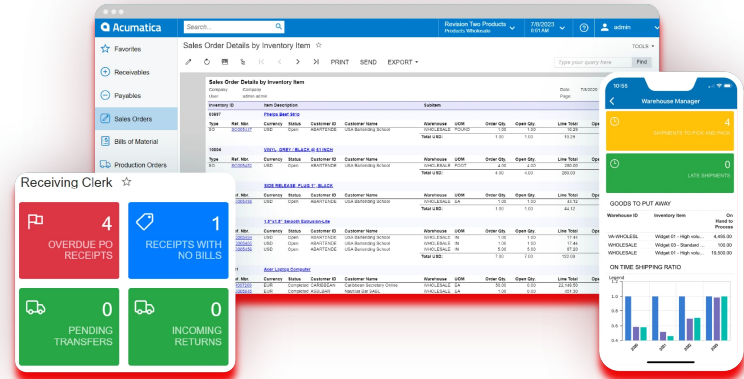


Acumatica Cloud ERP



Acumatica Overview

- Manufacturing “Plus” – All in One
- Dashboards
- Manufacturer workflow
- CRM



Source: Acumatica

Thank you!

Robert Jacobs
Digital Growth Director
CLA
robert.jacobs@CLAconnect.com



CLAconnect.com



CPAs | CONSULTANTS | WEALTH ADVISORS

©2024 CliftonLarsonAllen LLP. CLA (CliftonLarsonAllen LLP) is an independent network member of CLA Global. See [CLAglobal.com/disclaimer](https://www.claglobal.com/disclaimer).
Investment advisory services are offered through CliftonLarsonAllen Wealth Advisors, LLC, an SEC-registered investment advisor.