

# Quote-to-Cash with Acumatica Manufacturing Edition

The quote-to-cash process in Acumatica Manufacturing Edition comprises three phases and 14 unique steps. Take control with configurable workflows, automated processes, and flexibility to get paid faster.



## PHASE 1: Prepare and Sell

### STEP 01 Item Definition

Item Maintenance, **Product Configurator**, Requisition Management, **Matrix Items**, Non-Inventoried Items

### STEP 02 Lead Generation

Embedded **CRM** with Lead and Opportunity Management and Configurable Sales Workflows

### STEP 04 Quotation Management

Sales Quotes, Service Quotes, Project Quotes, Support Contract Quotes, **Electronic Signatures** with DocuSign

### STEP 03 Pre-Quote Activities

MTO: Manufacturing **Estimates**, MTS: BOM and Routing Definition, Project-Centric: **Project Accounting**, CTO: Product Configurator, ETO: **CAD/PLM** BOM, Requisitions

### STEP 05 Sales Order Creation

Quote Conversion, File Imports, **Commerce Storefront** Orders, **Point-of-Sale** Transactions, Connected EDI Apps

## PHASE 2: Produce and Fulfill



### STEP 07 Production Scheduling

Finite Schedules, Labor and Material Constraints, **Capable to Promise**, Machine and Tooling, Shop Calendars

### STEP 06 Production Orders

Demand **Forecasts**, Production Order Maintenance, Material and Labor Transactions, **Backflushing**

### STEP 08 Material Planning

**Rough-Cut Capacity Planning**, MRP Display, Inventory Replenishment, Blanket POs, **Lot/Serial Tracking**

### STEP 09 Production Management

**Job Costs**, Work-in-Process (WIP), Manufacturing Data Collection with **Barcoding**, Production Dashboards

### STEP 10 Order Fulfillment

Embedded **WMS**, Barcoding, **Wave and Batch** Picking, Packing, **Shipping**, Scale Integration, Transfers



## PHASE 3: Account and Analyze

### STEP 11 Accounting Activities

General Ledger, Accounts Receivable, Accounts Payable, Sales Tax, Expense Management, **Intercompany Accounting**, Multicurrency, Recurring and Deferred Revenue with ASC 606 and IFRS 15 Compliance,

### STEP 12 Cash Collection

Credit Controls, **Collections** Activities with Dunning Letters, **Credit Card** and EFT Payments, **Bank Feeds**

### STEP 14 Reporting and Analysis

Reporting, Generic Inquiries, **Business Intelligence** with Microsoft PowerBI, **Dashboards**, Sales Commissions

### STEP 13 Supporting Processes

**Mobile Apps**, Time and Task Management, Payroll, Fixed Assets, AP Automation with **Artificial Intelligence** and Machine Learning, **Engineering Change Control**, Field Service, Return Merchandise Authorization (RMA), More

“Full supply chain visibility will enable us to target the areas where we have issues and tackle them, to ensure we are operating efficiently and driving growth across sales, supply chain, manufacturing and finance.”

– DEREK SZABO, MANAGING DIRECTOR, DEVIL’S PEAK BREWING COMPANY

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Discover Why Businesses Rely on Acumatica to Perfect the Quote-to-Cash Process

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