Acumatica
The Cloud ERP

Resilient Sales Strategies for Wholesale Distribution and Retail Commerce Leaders

BOOST SALES, CUT COSTS, AND GROW PROFITS DESPITE UNCERTAIN MARKET CONDITIONS

Fear of a pending recession, pandemic-induced supply chain disruptions, and historic inflation cast a dark shadow on industry forecasts, especially industries like wholesale distribution and some retail sectors with historically slim margins.

Uncertain market conditions coupled with disintermediation from manufacturers selling direct-to-consumer (D2C) challenge distributors slow to implement modern systems to protect eroding margins. For example, D2C sales in the United States are projected to grow by more than 14 percent annually.[1] Disintermediation affects retail and commerce industry sectors forcing distribution and retail business executives to rethink their value propositions and reinvent their organizations with specialized products and value-added services.

Businesses using entry-level accounting and legacy ERP applications struggle to grow due to delayed and incomplete information, costly manual business processes, and excessive IT expenses.

Armed with information, proven strategies, and systems to automate business processes, wholesale distributors, retailers, and commerce business executives gain insights to outmaneuver competitors, boost sales, reduce costs, and enter new markets to diversify and grow their businesses. This eBook provides executives with an overview of Acumatica Cloud ERP for marketing, sales, pricing, and discount strategies to thrive in uncertain times.

HOW TO BOOST SALES AND ELEVATE PROFIT MARGINS

[1] Source: Insider Intelligence, 2021

Develop a Healthy Pipeline with Marketing Automation

Distributors, retailers, and commerce leaders rely on marketing to drive demand, foster relationships, and increase sales. Leads come from traditional sources like advertising, website traffic, word-of-mouth, trade shows, and email campaigns.

WEB MARKETING

Modern ERP applications like Acumatica provide embedded marketing automation and native inbound marketing connections to tools like Hubspot to manage content for search engine optimization (SEO). Monitor traffic and conversions from landing pages or commerce storefronts.

EMAIL AND TELEMARKETING CAMPAIGNS

Segment customer and prospect lists for email and telemarketing campaigns. Log follow-up calls, schedule meetings, and store documents for improved activities. Modern business systems like Acumatica provide email deliverability and campaign open and click rates to measure results.

ADVERTISING AND EVENTS

Create campaigns to assess advertising, webinar, podcast, trade show, and event performances. Define campaign costs to determine the value of each lead, opportunity, and return on investment.

PARTNER AND REFERRAL MARKETING

Create relationships between prospect and partner records for visibility into referral networks with analytics to identify top partners.

360-DEGREE VIEW OF ACTIVITIES

Connect ERP and CRM in a single platform for a complete view of financials, sales activities, orders, returns, and shipments in one place.

Automate Sales Processes to Grow Revenue

Improve win rates and increase sales value with an omnichannel business platform that includes everything you need to grow your business.

STREAMLINE SALES PROCESSES

Assign leads automatically based on geography, product line, and other criteria. Use business events to move prospects between nurture campaigns and sales processes. Shorten cycles with automated email and electronic signatures.

GROW REVENUE WITH ITEM SUGGESTIONS

Sell more with system recommendations for sales order up-sell and cross-sell to boost sales revenue and never lose a sale with defined item substitutions available during order entry.

EMPOWER SALES TEAMS WITH MOBILITY

Arm sales reps with mobile apps to access CRM information and manage sales activities from mobile devices. Connected applications provide advanced features for route sales activities.

GAIN INSIGHTS INTO STOCK AND RESOURCES

Provide secured access to stock levels, open purchase orders, and service resources for support, projects, and field services. Tag purchase orders to sales orders and reserve stock for customer orders.

MANAGE TEAMS EFFECTIVELY

Create sales reporting structures and establish teams for reporting with role-based dashboards, actionable reports, and real-time sales analysis.

AUTOMATE COLLECTIONS ACTIVITIES

Make better decisions with credit management and improve cash flow with automated dunning letters and prioritized collection activities.

REWARD CUSTOMER TO DRIVE SALES

Connect sales activities with loyalty programs and use gift cards from certified apps to drive sales.

IMPROVE COMPLIANCE

Reduce compliance risk with embedded sales tax calculations and secured credit card transactions.

MANAGE SALES COMMISSIONS

Reward sales teams with configurable commission programs, varied pay-out frequencies, and flexible commission calculations. Pay commissions with native payroll when the order is invoiced, or payment is received.
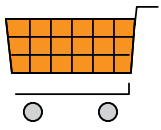
Grow Sales with Retail and Commerce Apps

Most retailers sell online. Retail and commerce sales are sound strategies for distributors. Digital native businesses rely on their commerce platform for sales with opportunities to expand into brick-and-mortar locations. Modern business platforms like Acumatica provide a suite of connected apps to manage omnichannel sales, returns, and exchanges.

> "We're starting to see great conversations that are improving productivity and our gross profit because everyone sees the exact same information, in the same way on the same system at the same time. That's extremely powerful."
>
> – DERRICK ELLEDGE, VP OF OPERATIONS AND CO-OWNER
>   POWER STORAGE SOLUTIONS

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COMMERCE-ENABLED ERP SOFTWARE

Legacy ERP and entry-level accounting apps provide limited integration between storefronts and systems for fulfillment and accounting. Users struggle with manual export and import processes causing errors and delayed information. Modern systems like Acumatica provide a holistic solution with bidirectional connections to harmonize data with current stock status and order synchronization.

OMNICHANNEL CUSTOMER EXPERIENCE

Today's discerning customers expect an omnichannel experience for purchases, returns, and exchanges online, in-store, or directly from vendor warehouses. Thrill customers with efficient transactions and a consistent experience across all sales channels.

COMMERCE AND RETAIL MARKETING

Leverage embedded marketing capabilities inside storefront and retail applications like Shopify and Amazon to drive online and in-store sales with item recommendations for up-sell, cross-sell, and item substitutions. Boost sales with coupons, gift cards, loyalty programs, social media campaign leads, email marketing, search engine optimization, pay-per-click campaigns, and other activities.

REAL-TIME BUSINESS INSIGHTS

Analyze sales across channels and products with role-based dashboards, flexible reports, intuitive inquiries, and powerful analytics applications like Microsoft Power BI.

B2C STOREFRONTS AND MARKETPLACES

Sell online with a dedicated consumer storefront powered by Shopify, Amazon, Magento, or other platforms. Connect seamlessly with Amazon's Seller Central marketplace. Track and reconcile all seller fees from Amazon while keeping sensitive customer information secure from improper exposure.

B2B COMMERCE STRATEGIES

Empower business customers with the Acumatica for BigCommerce Native Connector. B2B customers can access stock levels, process returns and exchanges, enjoy customer-specific pricing, and place orders on account through the secured online storefront with self-service inquiries into sales history, account statements, payments, and invoices.

BRICK-AND-MORTAR SALES

Digital native businesses, small retailers, and distributors often have a physical storefront. Connected point-of-sale applications and counter sales automate in-store sales, returns, and exchanges with connected hardware for cash registers, credit card terminals, barcode scanners, and receipt printers.

RENTAL AND SERVICE MANAGEMENT

Manage non-stock sales for projects and services with native project accounting and field service applications. Grow sales with connected rental management applications.

Improve Profits with Flexible, Product-Centric Pricing Models and Real-Time Insights

Prices decline as products mature and competition increases. New, innovative, and high-quality products command higher prices. Further, economic and geopolitical conditions impact supply and demand, resulting in commodity price fluctuations. Seasonal demand, increased costs, inflation, and other factors affect pricing strategies. Low prices may boost unit sales but at a lower profit due to increased carrying costs, while soaring prices may stifle growth pushing customers to competitors. Get it right, and you position your company for sustainable development and loyal customers for life.

"If you have streamlined operations, understand pricing and have up-to-date information, you can be very competitive and take advantage of inefficiencies in the market."

– PATRICK MADISON, CFO, KORPACK

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BASE PRICE AND MARK-UP DEFINITIONS

Pricing often starts with a base price used for sales of products with limited cost fluctuation. The base price can be marked up by a percentage to derive desired margins. Alternatively, companies can use an item's last, standard, or average cost with a markup percentage to calculate current list prices. Retailers and distributors may also use the manufacturer's suggested retail price (MSRP).

CUSTOMER AND CUSTOMER GROUP PRICING

Define prices for specific customers or groups of customers based on attributes such as customer class, geography, or other parameters.

PROMOTIONS AND PRICE EFFECTIVE DATES

Use effective dates to define a start and end date and promotion amount or percentage. Promotions may also be set up to encourage volume purchases, such as free-item promotional discounts like buy-one-get-one.

VOLUME-BASED MULTIPLIERS AND DISCOUNTS

Midmarket ERP systems like Acumatica support volume pricing, where the cost per unit decreases with tiered order volume for a single item or combination of items.

UNIT OF MEASURE AND WAREHOUSE PRICING

Establish special pricing for specific units of measure, such as a case order volume break, or set prices and promotions by warehouse location to manage margins across geographic regions.

BEST PRICE SELECTION RULES

Analyze pricing rules and active promotions to find the best price based on price criteria. The system may limit how many discounts may be applied for a single order protecting profit margins.

CURRENCY MANAGEMENT

Use multiple base currencies to account for costs across geographies, with sales prices set for specific foreign currencies with updated currency conversion calculations.

TAXABLE SALES

Define products and services as taxable or non-taxable with connections to online tax engines like Vertex or Avalara for updated tax calculations. Analyze net and gross tax for each order.

VENDOR PRICE IMPORTS AND UPDATES

Import utilities streamline item portfolio and price management. Import vendors, items, and price lists. Process mass updates for seasonal demand or cost increases.

VALIDATION RULES AND INSIGHTS

Automate validation rules for minimum markup percentages and create role-based dashboards to analyze margins by product, product groups, warehouses, customers, customer classes, and other criteria. Use business events to notify executives when vendor costs change, and margins fall below targets for specific orders.

Service-Centric Pricing for Non-Stock Items

Retailers and distributors of commoditized items in competitive markets must differentiate with value-added services. Other commerce organizations and businesses sell virtual, non-stock items or provide billable services. These organizations rely on connected business platforms to manage non-stock items with flexible billing processes for service and support.

"Acumatica has been behind our success and their support team has been integral in making sure that we've been as successful as possible. I would definitely recommend Acumatica to someone looking for a new ERP solution. Acumatica would be a great asset to anyone trying to expand its eCommerce platform."

– THOMAS FINNEY, IT DIRECTOR, SHOEBACCA

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NON-STOCK ITEMS AND STOCK CONVERSION

Create non-stock items for virtual products such as digital downloads, memberships, or warranties. Set up services as non-stock items for inclusion on orders. Convert stock items to non-stock items when you no longer need to carry them or convert non-stock items to stock when demand increases.

SERVICE CONTRACT PRICING

Expand sales and fend off competitors with service contracts with technician appointments and equipment service contracts. Manage labor, parts, and expense billing processes with flexible markup options and configurable billing, including fully automated service billing.

PROJECT-BASED PRICING

Gain a complete view of project-related costs for materials, labor, services, and inventory items to determine project prices using fixed-price, time and materials, or usage-based retainers. Acumatica's robust project management price engine calculates invoice totals with flexible project billing rules like progress billing based on milestones.

BILLABLE SUPPORT CONTRACTS

Bill for non-contractual customer support and technical services with native contract management. Establish contract pricing based on support cases and technician time entries.

TIME AND EXPENSE MANAGEMENT

Comprehensive business applications like Acumatica include native time management with mobile timecards. Leverage artificial intelligence with machine learning to streamline and automate expense receipts from mobile devices with configurable workflows for time and expense approvals. Employee time and expenses flow seamlessly to the project accounting and service management applications for customer billing.

MOBILE SERVICE MANAGEMENT

Empower field technicians and remote workers with access to project details, service appointments, equipment history, and other information they need while performing services at customer locations.

Discover Why Retailers, Digital Commerce Organizations, and Wholesale Distributors Rely on Acumatica for Omnichannel Success

RETAIL AND COMMERCE >
WHOLESALE DISTRIBUTION >

Flexible Discount and Manager Approval Strategies

Discounts are commonplace in retail and distribution businesses. Some discounts are planned as approved promotions with established start and end dates. Other discounts are needed to retain customers or to win competitive deals. Sales reps must have a certain level of autonomy to create discounts. Meanwhile, sales managers need transparency to identify and prevent steep discounts that erode profit margins. Modern business applications like Acumatica provide systematic tools to empower sales reps with real-time monitoring and automated notifications for management approvals.

> "When global supply chain problems caused prices on every widget that we sell to flux, we had to be nimble and quickly get replacement costs into the system overnight. Acumatica was able to handle that . . . There would have been no way to have the control and flexibility we have today with customer pricing and an accurate view of our costs without Acumatica."
>
> **– KEITH FORD, PRESIDENT, EAGLE FENCE DISTRIBUTING**

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PROFITABILITY AND MARGIN VISIBILITY

The Daily Sales Profitability report provides insights into order margins with filters to group data for analysis. The Sales Analysis Profitability inquiry displays margins for invoiced order lines.

PROMOTIONAL PRICING EFFECTIVE DATES

As mentioned, modern applications like Acumatica support promotional prices with start and end dates. These approved and predetermined discounts flow through to sales orders, online orders, and point-of-sale orders, providing a seamless customer experience.

AUTOMATIC DISCOUNTS

Some companies implement multiple discount scenarios simultaneously. Various discounts with different effective dates create barriers to customer service. Automatic Discounts streamline order entry processes by selecting discounts based on defined successions to arrive at the most desirable price for the organization and the customer.

DISCOUNTS BY LINE, GROUP, OR ORDER

Flexibility is vital for every business. Systems like Acumatica empower sales professionals with discounts by amount or percent for an order line, groups of lines, or the entire order.

MANUAL DISCOUNTS

Empower sales executives with manual discounts to outmaneuver competitors and retain customers. Establish rules and business processes to place orders on hold pending approval before processing larger manual discounts. Approval workflows can be routed to an individual or a group with single or multiple approvals to ensure that management is on board with every price exception.

MANAGER NOTIFICATIONS AND APPROVALS

Business events streamline communication between customer service, sales reps, and sales leaders. Use events to trigger notifications for new orders requiring discount approval. Sales executives access notifications inside Acumatica or on their mobile devices anytime, anywhere while traveling. Set up role-based dashboards and use reports and inquiries to monitor discounts in real time across your sales organization.

ADVANCED PRICING STRATEGIES

Save time and solve complex pricing problems with fewer errors and more profitable sales with sophisticated formulas and multiple layers of price and discount rules to calculate complex prices, discounts, and rebates with certified marketplace apps like **Rockton Pricing Management**.

Maximize Profits with Advanced Strategies

A modern ERP application like Acumatica provides retailers, etailers, and distributors with tools to streamline business processes, boost sales, and cut costs for higher profit margins and happier customers.

> "We've really taken the human element out of things like special pricing and leaned on the Acumatica system, which has paid a lot of dividends. It's made my life a whole lot easier."

– BRETT DAVIS, OPERATIONS MANAGER, BOB DAVIS SALES

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DIVERSIFY SUPPLIER NETWORKS

Use purchase order requisitions to discover new suppliers and unique products to differentiate against competitors. Ensure that you have multiple suppliers for your top-selling items and groom new suppliers with embedded CRM to foster continued relationships.

EVALUATE PRICES OFTEN

Use CRM to capture and document competitor pricing for analysis. Review prices often, especially for top items and for products with seasonal cost and availability fluctuations. Create alerts to inform you when vendor price increases erode margins based on established customer price definitions.

LEVERAGE ANALYTICS

Use role-based dashboards, actionable reports with drilldowns to source transactions, and dimensional analytics to adjust prices for cost increases, customer demand, and other scenarios.

CONTINUOUS IMPROVEMENT MONITORING

Understand customer value, churn, and growth using dashboards and reports. Analytics help executives and sales professionals maximize customer value and retention.

MAKE IT PERSONAL

Use CRM to personalize customer communications. Offer personalized pricing and auxiliary services on commerce sites to differentiate against competitors. Business platforms like Acumatica streamline product customization from online storefronts with notes to back-office order fulfillment for customized product creation or custom kit assembly.

DROP-SHIPMENTS

Get products to customers faster by drop-shipping orders directly from vendors with purchase order tagging to sales orders.

SPECIAL ORDERS AND REQUISITIONS

Use purchase order requisitions with vendor bidding to find hard-to-find items your customers need. Quickly create inventory records and manage special orders to grow revenue.

UNDERSTAND COGS AND VALUATION

Isolate costs of goods sold for analysis to spot areas you need to adjust. Understand how different inventory valuation methods affect financial reporting. Improve profits by switching from standard costing to FIFO or average costing.

REDUCE CARRYING COSTS

Implement strategies to reduce carrying costs with exact vendor lead times and dynamic safety stock levels with automated replenishment to reduce inventory levels.

IMPROVE RESPONSE TIME

Leverage technology for quote creation, quote delivery, and electronic signatures to expedite sales processes. Implement online chat from storefronts for faster customer response and improved online sales conversions.

CREATE A RECURRING REVENUE STREAM

Join the wave of retailers and distributors offering subscription boxes to grow revenue with predictable demand and systems to manage subscription renewals, deferred and recurring revenue, and kit assembly and disassembly.

PAMPER YOUR CUSTOMERS

Use CRM to gain a holistic view of every customer interaction for improved relationships and fiercely loyal customers. Automate contact birthday emails, celebrate customer anniversaries, and reward customers with special pricing and loyalty programs via marketplace applications to build stronger relationships and sales. Empower customers with self-service portals and automated notifications for backorder releases and shipment tracking.

REWARD GOOD BEHAVIOR

Know who your top customers are and reward good behavior when customers pay on time with few product returns. Implement customer referral programs and use marketplace apps to issue coupons or loyalty programs for customers who provide company and product reviews.

IMPROVE DEMAND FORECASTING

Use seasonality to predict future demand or set up blanket sales orders to improve demand forecasts for contractual sales agreements. Smarter demand forecasting mitigates roadblocks to growth with agile supply chains providing transparency from customers to downstream suppliers ensuring on-time shipments and lower costs.

WAREHOUSE AUTOMATION

Implement advanced warehouse strategies to streamline picking, packing, and shipping with barcode scanners, wave and batch picking, and prioritized paperless picking queues.

VENDOR INVENTORY STRATEGIES

Reduce costs with consigned and vendor-managed inventory with secured access to system records and reports for strategic suppliers and automated reporting and order processing.

MANAGE SLOW MOVING ITEMS

Optimize warehouse space by isolating and eliminating slow-moving and dead stock items for more profitable sales and reduced carrying costs. ABC rank codes can help reorganize stocking locations for faster order fulfillment.

MANAGE PERISHABLE GOODS

Reduce quality issues and write-offs for perishable goods with embedded quality management, first-expired-first-out picking, and cradle-to-grave lot and serial traceability. Use lot expiration dates for quality testing and stock rotation.

CONTAIN COSTS AND MANAGE EXPENSES

Use warehouse automation and configurable workflows to do more with less staff to stabilize labor costs. Harness artificial intelligence with machine learning to streamline expense management for faster expense approvals, mobile receipt scanning, and improved vendor payments.

EVALUATE SHIPPING COSTS

Harness the power of embedded shipping apps to select low-cost shipping providers and analyze shipping costs for strategic planning and pricing. Know which providers to use based on geography, shipping quality, and special considerations like a weekend or home delivery and accessorial requirements for specialized equipment.

REGIONAL EXPANSION

Establish warehouses closer to strategic customers or in geographies with lower costs and better options for shipping and fulfillment.

EXPAND MARKETS AND CHANNELS

Grow internationally with a business platform designed for multiple base currencies, multi-currency conversions, and localized tax and accounting standards such as sales tax, use tax, value-added tax, generally accepted accounting principles (GAAP), and international financial reporting standards (IFRS). Grow revenue by offering billable support, extended warranties, field services, or consulting with project accounting.

DEVELOP INTELLECTUAL PROPERTY

Create products with research and development, implement additive manufacturing, or manage contract manufacturing resources to offer unique products that differentiate you from competitors.

AUTOMATE PRICE CALCULATIONS

Implement an advanced pricing engine like **Rockton Pricing Management** to handle any possible pricing scenario to ensure maximum profits for every line item.

HIRE EXPERTS AND LEVERAGE PROGRAMS

Hire an independent consultant or work with your certified public accounting firm to find areas where you can cut costs, boost revenue, and expand markets. Take advantage of federal small business administration programs or join buying groups for better pricing.

"With Acumatica, having access to information was a game changer for us . . . It has led to less pockets of out of stocks and less waste because we can take immediate action through discounting or promotion."

– CLYDE ATTARD, SALES DIVISIONAL MANAGER, P. CUTAJAR & CO.

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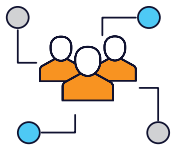
Industry Considerations

Every business has unique challenges, but some industry segments are more challenging than others due to inherently low margins and increased competition. For example, retailers engaged in electronics and appliances and food and beverage products have much lower gross margins as a percentage of sales compared to peers in other industry groups. Likewise, nondurable goods wholesalers' gross margins as a percentage of sales are nearly eleven percent lower than distributors of durable goods. These industry factors must be considered carefully when analyzing corporate performance, defining goals, and setting prices.

"Acumatica has given us a robust eCommerce solution to keep us on the cutting edge. We have the flexibility and data access that we need to scale our business as we grow, and to identify and resolve potential problems to our customer's satisfaction quickly."

– ETHAN PLATT, PRESIDENT, AMERICAN MEADOWS

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RETAIL TRADE

Retailers depend on manufacturer costs which fluctuate due to market conditions, supply and demand variations, and other factors. Labor force issues are always a critical business factor in terms of attracting, hiring, training, retaining, and scheduling staff. Industry associations and peer groups may offer benchmarking services to understand how you compare to others in your industry. Other benchmark services may be available from larger CPA firms.

Estimated Annual Gross Margin as a Percentage of Sales of U.S. Retail Firms[2]

Retail Business Segment	Gross Margin %
Office supplies, stationery, and gift stores	33.0
Motor vehicle and parts dealers	19.0
Furniture and home furnishings stores	47.4
Electronics and appliance stores	28.7
Building materials and garden equipment and supplies	35.2
Food and beverage stores	28.0
Health and personal care stores	29.3
Gasoline stations	19.5
Clothing and clothing accessory stores	41.8
Sporting goods, hobbies, musical instruments, and bookstores	42.2
General merchandise stores	27.4
Miscellaneous store retailers	50.7
Nonstore retailers	41.2
Electronic shopping and mail-order houses	40.1

[2] Source: US Census Annual Report on Retail Trade Survey 2020 Data

"Acumatica has a Shopify connector that's so simple there's no need for customization . . . if we pick up two or three brands tomorrow, we won't have to worry about the technology aspect one bit. We simply add warehouse and manpower capacity, and we are good to go."

– LESTER YUEN, VP OF OPERATIONS AND FINANCE
 TIMEBOMB TRADING, INC.

WHOLESALE DISTRIBUTION

Distributors run on thin margins—especially in nondurable goods industries such as food and beverage, petroleum, and agricultural products. Margins are tight across many durable goods sectors due to consumer and business pricing pressure and increased competition in commoditized markets like computers and motor vehicles. Distributors are challenged with disintermediation as manufacturers circumvent traditional distribution networks with direct-to-consumer sales models via online storefronts or factory stores. New competitors have low barriers to entry in global markets with ubiquitous commerce storefronts and burgeoning marketplace opportunities. Further, competitors are born overnight as retailers like Amazon erode distribution market share with new wholesale product offerings. These trends force distributors to reinvent themselves with new and unique product portfolios and value-added services. Many distributors discover they cannot compete with entry-level accounting systems or legacy distribution ERP applications that lack storefront and marketplace connections with few applications to manage strategic service offerings.

Estimated Annual Gross Margin as a Percentage of Sales of U.S. Wholesale Distributor[3]

Wholesale Trade Business Segment	Gross Margin %
All Wholesale Trade	19.6
Durable Goods	25.0
Motor Vehicle and Motor Vehicle Parts and Supplies	19.8
Furniture and Home Furnishings	31.6
Lumber and Other Construction Materials	26.2
Professional and Commercial Equipment and Supplies	24.6
Computer and Computer Peripheral Equipment and Software	17.0
Medical, Dental, and Hospital Equipment and Supplies	31.4
Metals and Minerals (except Petroleum)	15.0
Household Appliances and Electrical and Electronic Goods	26.1
Hardware, and Plumbing and Heating Equipment and Supplies	29.0
Machinery, Equipment, and Supplies	27.7
Miscellaneous Durable Goods	27.0
Nondurable Goods	14.3
Paper and Paper Products	22.2
Drugs and Druggists' Sundries	10.1
Apparel, Piece Goods, and Notions	30.4
Grocery and Related Products	14.9
Farm Product Raw Materials	15.0
Chemicals and Allied Products	24.7
Petroleum and Petroleum Products	5.3
Beer, Wine, and Distilled Alcoholic Beverages	28.6
Miscellaneous Nondurable Goods	17.1

[3] Source: US Census Annual Report on Wholesale Trade Survey 2020 Data

Customer Support

Customer experience is paramount in retail and commerce industries. Distributors have been paying more attention to customer loyalty in recent years to fend off competitors. Modern business applications like Acumatica provide customer-centric features to improve customer support with case management and self-service portals. Log customer incidents with configurable and automated case assignments to support technicians based on workload or skills. Monitor service level agreements with role-based dashboards and actionable reports with drilldowns to source transactions. Provide customer case transparency with automated updates and secured access to data for collaboration on issues.

Acumatica's flexible customer support offering is available for billable and non-billable support. Quickly process refunds, schedule and dispatch field service technicians, and authorize RMAs for returns and exchanges directly from the customer support application.

EXCERPT FROM TAYSE RUGS SUCCESS STORY

"At the end of the day, it falls to the services you provide, how well you present your product, and the price point. If we can offer the exact same product, at the exact same quality and price point, it comes down to personal preferences and choices. But one of the main points is how competitive you are in your pricing." Because Tayse Rugs has leveraged Acumatica and its partners to create a highly efficient company, Tayse is well-positioned to be a technical industry leader.

– TAYLAN SEVIMLI, BUSINESS DEVELOPMENT MANAGER, TAYSE RUGS

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Supporting Applications

Acumatica is a holistic business platform with robust financials, flexible business analytics, and connected applications for order management, inventory planning, service, manufacturing, and construction.

Advanced financials improve accounting processes with automated bank feeds and advanced expense management powered by artificial intelligence with machine learning for faster expense tracking and accounts payable processing. Depreciate assets with fixed assets and manage payroll effortlessly with native payroll management.

Access hundreds of best-in-class applications from the **Acumatica Marketplace** to extend your system to automate business processes to improve customer satisfaction and supplier interactions. Leading applications are available for shipping, electronic data interchange (EDI), commerce storefronts and marketplaces, rental business management, vendor portals, product labeling, credit card processing, container tracking, budgeting, royalty management, gift and loyalty card programs, and more.

ERP Feature Checklist

Acumatica provides a **general ERP feature checklist** with standard accounting requirements. Similar checklists are available for **retail-commerce** and **wholesale distribution**. The checklist below provides a consolidated list of features progressive retailers, digitally native organizations, and distributors should expect to find in modern business platforms.

FEATURE	BENEFIT	PRIORITY	Acumatica		
CRM Automation	Generate more leads with marketing automation and close more deals with sales force automation.		✓		
Commerce and Marketplace Apps	Sell online with native B2B and B2C commerce storefronts and connectors for Amazon and other marketplaces.		✓		
Omnichannel Sales, Returns, & Exchanges	Create orders and capture online or in-store sales with omnichannel returns and exchanges.		✓		
Retail Point-of-Sale	Sell in-store with native point-of-sale for showroom or counter sales with cash register, receipt printer, credit card terminals, and barcode scanners.		✓		
Mobile Accessibility	Access every business function on any device, anytime, with native cloud connectivity and mobile apps.		✓		
Item Suggestions	Sell more with item replacements, up-sell, and cross-sell suggestions.		✓		
Business Insights	Gain real-time insights with role-based dashboards, actionable reports, flexible inquiries, and robust analytics.		✓		
Sourcing	Automate purchase orders with inventory replenishment and discover new vendors with purchase requisitions.		✓		
Advanced Pricing & Discounting	Establish flexible pricing by item, item class, customer, customer group, and other parameters with time-phased promotions and discount rules.		✓		
Sales Commissions	Create and administer sales commission plans to boost sales with native payroll for commission payments.		✓		
Inventory Management	Manage stock across warehouse locations with bin tracking, serial and lot control, kitting, disassembly, physical inventory, and replenishment settings.		✓		
Demand Forecasts	Mitigate supply chain issues with accurate demand forecasts based on manual forecasts, historical sales, and seasonality via marketplace apps.		✓		
Warehouse Automation	Automate warehouse transactions with barcode scanners, wave and batch picking, prioritized paperless picking queues, and more.		✓		
Global Sales Management	Sell globally with multiple base currencies, multi-currency conversions, and local accounting and tax compliance.		✓		
Services	Expand sales for professional and field services with native apps for project accounting, service management, and customer service and support.		✓		
Subscriptions with Revenue Recognition	Create recurring revenue streams with contracts, blanket sales orders, deferred revenue, and recurring revenue.		✓		
Quality Management	Improve quality with quality management with testing, corrective actions, and non-conformance management.		✓		
Automation	Gain efficiencies with flexible business workflows and artificial intelligence with machine learning to streamline and automate business processes.		✓		

Thrive in Uncertain Economic Times with a Future-Proof Business Platform

Retailers, etailers, and distributors face constant change with uncertain economic conditions and disintermediation from suppliers selling direct to consumers. Companies using entry-level accounting and legacy ERP applications struggle to capitalize on market opportunities due to manual processes, siloed data, and inefficient processes that stifle growth.

Conversely, Acumatica provides retailers, etailers, and distributors with a modern, adaptable, and robust suite of business applications to boost sales, control costs, and grow profits.

Generate high-quality leads with marketing automation and shorten sales cycles with embedded CRM for opportunity management. Accelerate sales with item substitutions, up-sell, and cross-sell suggestions powered by artificial intelligence with machine learning. Implement dynamic pricing rules to maximize sales value with configurable approvals to minimize discounts.

Exceed customer expectations with omnichannel sales, returns, and exchanges from retail locations, online, or in-house sales. Empower customers with self-service portals and grow revenue with value-added services, including support, field service, and billable projects with flexible contracts and billing.

Acumatica delivers an unparalleled experience for users and customers alike. It is built on a scalable and future-proof cloud ERP platform with open architecture and backed by the industry's best value-added reseller (VAR) network with hundreds of connected applications from leading development partners.
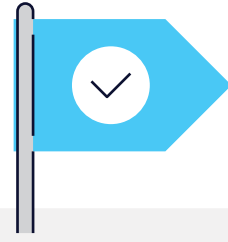
"We're a high volume B2C company and were finding that a lot of companies like us resort to heavy customization . . . Our success is ultimately tied to Acumatica's success, and they are building a strong and healthy product; they have a vibrant customer and development community and a product that's growing, not stagnant. We can really craft Acumatica to do what we need it to do"

– BEN ROTHE, PRESIDENT
   PREMIER 1 SUPPLIES

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ABOUT ACUMATICA

Acumatica Cloud ERP provides the best business management solution for digitally resilient companies. Built for mobile and telework scenarios and easily integrated with the collaboration tools of your choice, Acumatica delivers flexibility, efficiency, and continuity of operations to growing small and midmarket organizations.

Business Resilience. Delivered.

Learn more about how Acumatica can work in your business by visiting us online at www.acumatica.com.

Acumatica
The Cloud ERP