

Acumatica Helps IT Support Firm Cut Order Processing Time from Two Days to 10 Minutes

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– Paul Forres, Operations Manager, Global Asset

OVERVIEW

Global Asset moved its entire financial operations onto Acumatica to simplify data management and ensure integration of all systems.

SITUATION

Global Asset, founded in 2010, provides IT hardware asset management and related services to private- and public-sector customers, especially school districts and higher education. Operations Manager Paul Forres reports that Global Assets now has 30 full-time employees, and that number rises to 60-70 when K-12 schools and colleges trade out their old computer hardware for new equipment in the summer.

Forres says that in the beginning, Global Asset managed its inventory and financial data through a somewhat uncoordinated process: “A lot of our operations were run on QuickBooks and spreadsheets—it was kind of loosey-goosey.”

The company handles a huge and complex inventory. “They literally bring in containerloads of old equipment,” Forres says. “We’re required to do an inspection on everything. We have to sort through and catalogue. There’s a lot of detail to capture.”

Forres reports that Global Asset staff had to track the inventory through very large spreadsheets. This manual entry of data required a lot of staff time. “We turn the warehouse over two to three times a month,” he says. “We have 50-60,000 different SKUs in a given year and have to track everything. We receive a purchase order and ship a sales order with hundreds of unique line items and hundreds of serial numbers.”

In addition to wanting to improve the speed and functionality of their inventory and financial systems, Forres says the company management “wanted everyone working off one system” by 2013.

SOLUTION

Global Asset decided to implement Acumatica and has gone through two upgrades so far. They are using the Financial, Distribution, Project Accounting, and Customer Management suites.

Forres recalls how before the change to Acumatica, they needed a data-entry staffer to spend “50 to 60% of her time just processing shipments and receipts, which included hundreds to thousands of serial numbers. Some orders would take as long as 16 hours to complete. With customized import scenarios, we can process the same shipments and receipts in minutes.” Forres says switching the entire company from QuickBooks and spreadsheets to Acumatica



COMPANY

- **Location:** Carrollton, Texas (Dallas metropolitan area)
- **Industry:** IT systems analysis, support, and asset recovery, particularly for educational institutions

KEY RESULTS

- Significantly increased staff productivity through integrated financial and inventory data control
- Improved management of warehouse intake and distribution systems for thousands of items
- Reduced order processing time from two days to 10 minutes

produced some challenges, but AIM Solutions, an Acumatica Gold Certified Partner, provided strong support to address their needs. As a result, the staff has grown very comfortable with the software.

Forres says, "It's a pretty robust package... very flexible. It can do just about anything and can support a lot of lines of business."

"[Acumatica] brings my finances, my inventory control, my sales—everything—into a single system so that the entire company is talking apples to apples."

— Paul Forres, Operations Manager, Global Asset

BENEFITS

Forres is pleased that Acumatica helps their staff save "a huge amount of time. It allows us to focus more on what is good for our business and our process, rather than being stuck with a system and figuring out how to redesign around its process."

He appreciates having customized import scenarios to help manage Global Asset's warehouse operations. "We might need to deal with five different user interfaces to accomplish one process," Forres explains. "The import scenario allows us to gather all the information we need offline, put that into a spreadsheet, and—with one click—run through all the streams in the background on Acumatica."

Forres also values being able to create inquiries for customers, which he calls "a custom process for a special line of business. It makes them feel as if we have something more than a spreadsheet and a post-it note!"

He believes that Acumatica also helps empower staff by giving him the ability to define which users can access different areas within Acumatica: "Acumatica lets you customize, based on user roles, what screens people can see and what they cannot." Forres adds, "The shipping department is using Acumatica straightup—that's a big thing. Acumatica allows them to do what they need to do without heavy training requirements."

Now that "everyone in the entire company is using Acumatica, Forres says their productivity is increasing. "I get a bigger bang for my buck," he notes.

Forres likes having an ERP "system that supports our business as it changes. This allows us to concentrate on what works for us and what makes sense." He expects Acumatica will help their business continue to grow, and he looks forward to adding more enhancements "to give customers specialized portals to order online."

Forres says that Global Asset's operations are very complex, so he appreciates Acumatica as an ERP system that "brings my finances, my inventory control, my sales—everything—into a single system, so that the entire company is talking apples to apples."