

Acumatica: Easy to Use, Affordable ERP for Small Businesses

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– Dan Wilkins, President, Bell and Company

OVERVIEW

Bell and Company moved from an archaic paper-based financial system to QuickBooks in 2008, but Dan Wilkins, president of the industrial and marine parts distributor, knew he could better compete with larger competitors and gain greater insight into his business with a modern ERP system. Wilkins found that Acumatica was affordable, easy to implement and easy to use, which helped employees be more efficient and productive.

SITUATION

One of the first things Dan Wilkins did when he joined his family’s distribution business, Bell and Company, in 2008 was to automate the company’s financial processes, moving from a paper system to QuickBooks’ Enterprise Edition. Over time, he realized he needed more than a simple accounting package to run his small business—and to deliver the superior customer service he wanted the company to be known for.

“Our goal is to deliver customers the right products when they need them,” he says. One of the ways his team of eight does that is by proactively tracking manufacturers’ orders and making sure Bell and Company receives them on time so there are no delays in shipping to his customers, and by letting them know if there are.

Automated communication with customers isn’t part of QuickBooks, Wilkins says. The financial software also lacks sophisticated reporting, dashboards, and doesn’t integrate with third parties, such as a CRM, he adds. “We were getting by on QuickBooks, but I knew the advantages that more powerful software could bring to us and our customers,” Wilkins says. So he set out to find an affordable Enterprise Resource Planning (ERP) system for small businesses.

After thorough research helped narrow his choices, Wilkins looked at all the information companies provided online, including training videos. “I probably saw every Acumatica video on the internet, and was impressed by them,” Wilkins said. “Most of the software companies I looked at could provide the functionality I needed, but the key thing for me was to find something everyone could use and understand. My Acumatica demo helped me realize that the layout and workflow processes of Acumatica were better than any other offering.”

SOLUTION

Wilkins chose Acumatica’s cloud-based ERP for these reasons:

- Tight integration between sales and purchase orders
- Unlimited user pricing
- Highly configurable
- Ease of use and flexibility
- Detailed help and information available on every screen
- No additional hardware investment with the cloud version



COMPANY

- **Location:** Mobile, AL
- **Industry:** Industrial and Marine Supply Distributor

SOLUTION

- Acumatica Financial Management
- Acumatica Distribution Management
- Acumatica Customer Management
- Acumatica Fixed Assets

KEY RESULTS

- Tight integration between sales and purchase orders
- Automated communication with customers, improving customer service
- Mobile access, increasing employee productivity
- Reduced accounting costs by bringing AP in-house

Of his decision, Wilkins says, “I did demos with a lot of the ERP companies, the big ones, Infor and SAP. What I found with Acumatica and their partner Accounting Systems, Inc. (ASI) was their willingness to answer all my questions and do multiple demos. From the start, I really felt like they were here to fully support us.”

“I’m the co-owner, the president, salesman, purchasing agent, and the IT department; we don’t have the luxury of an IT team like bigger companies have,” he says. “But we were able, with the help of our partner, Accounting Systems, to implement the software in a manner that I wanted and to configure it how I wanted.”

“Acumatica is so easy to use that a lot of small companies can now adopt an ERP, host it in the cloud and save money by not having to buy new hardware or servers.”

One of the most laborious tasks when implementing a new software solution is loading historical data and product information into the software. Although companies can elect to start anew and run parallel systems, others, like Bell and Company, prefer to load past data to better understand how the company has historically operated. “Importing all our Business Accounts and Items into Acumatica was more straightforward and easier than I expected,” Wilkins says.

“Before Acumatica, we had no way to access the local resources on the network when we were away from the office. Now we have access to all our customer information, technical documents—it’s as easy as picking up the phone or using the app.”

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BENEFITS

No fees for growing the business

One of the key reasons for adopting Acumatica was its unlimited user pricing, Wilkins says, which makes it very affordable as the company continues to grow. “Competitors wanted us to pay per user, which wasn’t affordable,” he says. That’s because Wilkins not only plans to have the company’s employees use the system, but also to create customer and vendor portals and extend access to his accountant.

“With Acumatica, I liked the fact I did not pay per user. I also liked that they use AWS for their backbone and hosting,” Wilkins says. “Customer and vendor portals were a big item for me, and with other software companies, I found that if I wanted those, I would need more user licenses.”

Mobile access improves customer service

Bell and Company’s sales team has become more efficient by being able to access contact information from the field, manage workflows through one system, and access sales and purchase orders quickly.

“Our customer base is located along the Gulf Coast. Before Acumatica, we had no way to access the local resources on the network when we were away from the office,” Wilkins says. “Now we have access to all of our customer information and technical documents—it’s as easy as picking up the phone or using the app. The responsive design is great, so whether you’re on an iPad, an iPhone or a computer, the system responds to whatever device you’re on. It has really changed the way we are able to support a customer.”

Higher Warehouse Productivity

Acumatica has significantly improved xByte’s ability to serve customers, automating many invoicing and accounting processes, and streamlining warehouse pick and pull operations.

Prior to using Acumatica, the xByte warehouse team would need to put away 10 to 15 carts containing sometimes more than 40 parts, doing so one cart at a time since it lacked visibility in to the contents of each cart. But with Acumatica, they have that visibility, and it allows them to group like items together for faster re-stocking. “That’s a big time saver,” Brown says, estimating that it will save the warehouse team an hour or two per day that can be reallocated to other productive work.

Easy-to-use system streamlines implementation and employee training

One of Wilkins’ primary requirements was a system that was easy-to-use. “Being a small company, we didn’t have an IT budget to have an expensive implementation or dedicated personnel to manage the software all the time,” Wilkins says. “I knew if the software was too cumbersome and hard to follow that my employees would not use the software to its full potential.”

“The uniform design and layout of Acumatica was what I was looking for,” he reports. “Because the software is broken down into modules with the same layout for each module, the learning curve during employee training was streamlined.”

Additionally, “the help pages in Acumatica are really useful. From anywhere in the software, you can click on help and a page pops up explaining the current page you are on and the function of each field. That’s helped everyone out tremendously.”

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