

Acu-Core Launch



What is Acu-Core Launch?

Copious created the Acu-Core implementation for our distribution Customers. The Acu-Core implementation is based on a standardized configuration for the distribution industry. It addresses the core operations to include Financials, Inventory Management, Replenishment and Sales Order Processes. It is a Fixed Fee program which gives our Customers peace of mind that the initial implementation is a known cost. This allows the customer to realize a quick ROI by transferring your operations onto Acumatica in a timely manner. For customers who need more features, we still recommend starting with Acu-Core and taking advantage of our fixed fee offering which addresses the core business functions. We can always add other Acumatica features on a time and material basis. Copious strives to work with each customer to find the perfect implementation for your company.

 **Acumatica**
The Cloud ERP

Gold Certified Partner



What's Included

We have selected the following list of features for use in a distribution environment. Only the listed features are covered in an Acu-Core implementation. During these set-ups and configurations, your project stakeholders will be trained. If additional configurations are required, you will have the skills to manage your Acumatica system.

System Configuration

- Set all base configurations for 1 company - Distribution Standard
 - Set-up 1st 6 Users
 - 6 User Roles - Warehouse Employee, Executive Manager, Controller, Finance Clerk, Sales, Customer Service.
 - Install Standard Dashboards

Finance Settings

General Ledger

- Set-up GL Account Classes
- Provide Chart of Account import template and test
- Provide Segmentation import template and test
- Customize 5 Standard Financial Statements
 - Trial Balance
 - Profit & Loss
 - Balance Sheet
 - Profit and Loss Comparative
 - Balance Sheet Comparative
- Setting up Cash Accounts
 - 5 Payment Methods
 - 10 Bank Transaction Types
- Prepare Financial History Import Template and Test

Accounts Receivables

- 10 Terms Codes
- 5 Customer Classes
- Provide Customer import template and test
- Provide Alternate Locations import template and test
- Provide Open AR import template and test



Accounts Payables

- › 5 Vendor Classes
- › Provide Vendor import template and test
- › Provide Alternate Location import template and test
- › Provide Open AP import template and test

Taxation

Taxes

- › 10 Tax Zones
- › 5 Tax Categories
- › 15 Tax Codes

Distribution Settings

Inventory

- › 10 Item Classes
- › 10 Postng Classes
- › 5 Item Price Classes
- › 10 Packaging Types
- › 2 Availability Calculation Rules
- › 2 Warehouses
- › Locations within the Warehouses
- › 3 Price Lists
- › 3 Replenishment Classes
- › Provide Stock Items Import template and test
- › Provide Non-Stock Items import template and test
- › Import Physical Count Tags and post Inventory

Sales Orders

- › 5 Order Types
- › 10 Shipping Terms
- › 10 Ship Via Codes
- › 10 Shipping Zones

Purchase Orders

- › 10 FOB Codes



Forms

- › Check Form
- › Sales Order Form
- › Quote Form
- › Invoice Form
- › Purchase Order Form
- › Shipping Label
- › Product Label

Training

- › General Ledger
- › Accounts Payables
- › Accounts Receivables
- › Banking
- › Taxation
- › Inventory
- › Purchase Orders
- › Replenishment Planning
- › Sales Orders
- › Physical Inventory

Go Live Prep

- › Review final imports
- › Establish defined cut offs for transactions in legacy system
- › Import Open AR
- › Import Open AP
- › Import Physical Inventory Counts and post to establish correct inventory Qty

Go Live

- › Go Live



Customer Responsibilities

The following is what is expected from the customer during the Acu-Core implementation. These activities have been selected to reduce implementation costs and encourage proficiency within the customer's organization. At any time, Copious can customize the program on a time and materials basis to give each customer the experience that will work best for them.

Responsibilities

- › Customer completes assign courses on **Acumatica Open University**
- › Customer completes remaining tax zones and tax categories
- › Customer organizes their legacy data into supplied templates and imports into Acumatica
- › Customer reviews data for accuracy prior to importing
- › Customer makes any changes to existing data prior to import
- › Customer creates any additional user set-ups and Roles
- › Customer provides a list of stock locations by warehouse
- › Customer validates all financial results
- › Customer ensures that all users practice in Acumatica and develop proficiency
- › Customer will enter open Purchase Orders
- › Customer will enter open Sales Orders