



*We'll get you there.*

CPAs | CONSULTANTS | WEALTH ADVISORS

# Enhance M&D Operations With AI and Machine Learning Capabilities in Acumatica ERP

June 13, 2024



The information herein has been provided by CliftonLarsonAllen LLP for general information purposes only. The presentation and related materials, if any, do not implicate any client, advisory, fiduciary, or professional relationship between you and CliftonLarsonAllen LLP and neither CliftonLarsonAllen LLP nor any other person or entity is, in connection with the presentation and/or materials, engaged in rendering auditing, accounting, tax, legal, medical, investment, advisory, consulting, or any other professional service or advice. Neither the presentation nor the materials, if any, should be considered a substitute for your independent investigation and your sound technical business judgment. You or your entity, if applicable, should consult with a professional advisor familiar with your particular factual situation for advice or service concerning any specific matters.

CliftonLarsonAllen LLP is not licensed to practice law, nor does it practice law. The presentation and materials, if any, are for general guidance purposes and not a substitute for compliance obligations. The presentation and/or materials may not be applicable to, or suitable for, your specific circumstances or needs, and may require consultation with counsel, consultants, or advisors if any action is to be contemplated. You should contact your CliftonLarsonAllen LLP or other professional prior to taking any action based upon the information in the presentation or materials provided. CliftonLarsonAllen LLP assumes no obligation to inform you of any changes in laws or other factors that could affect the information contained herein.

# Welcome



**Nancy Bielke**

Digital Growth Director  
CLA



**Staci Connolly Anagnos**

Pre-Sales Specialist  
Acumatica



**Robert Jacobs**

Digital Growth Director  
CLA



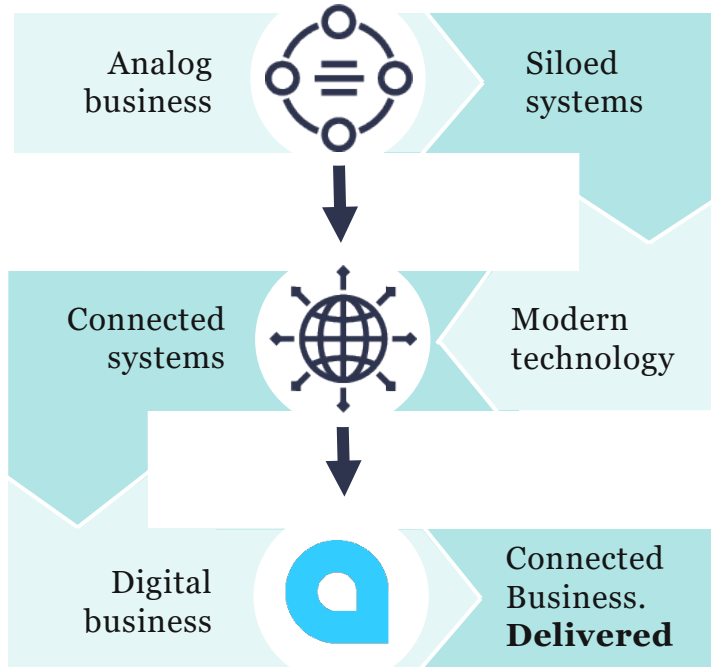
# Audience Poll

Are you using any form of AI in your business today?

- Yes
- No



# Cloud Driven Transformation

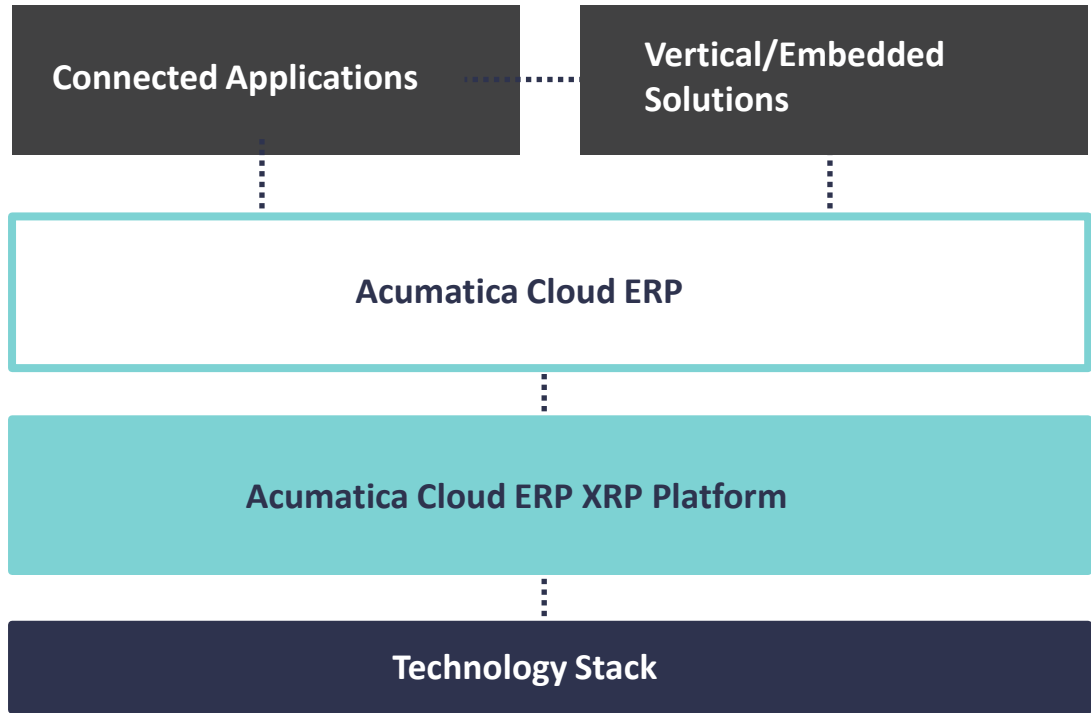


## The Transformed Business

- People and processes connected in efficient workflows
- Information centralized and accessible
- Data that is actionable so decisions can be made anywhere, anytime

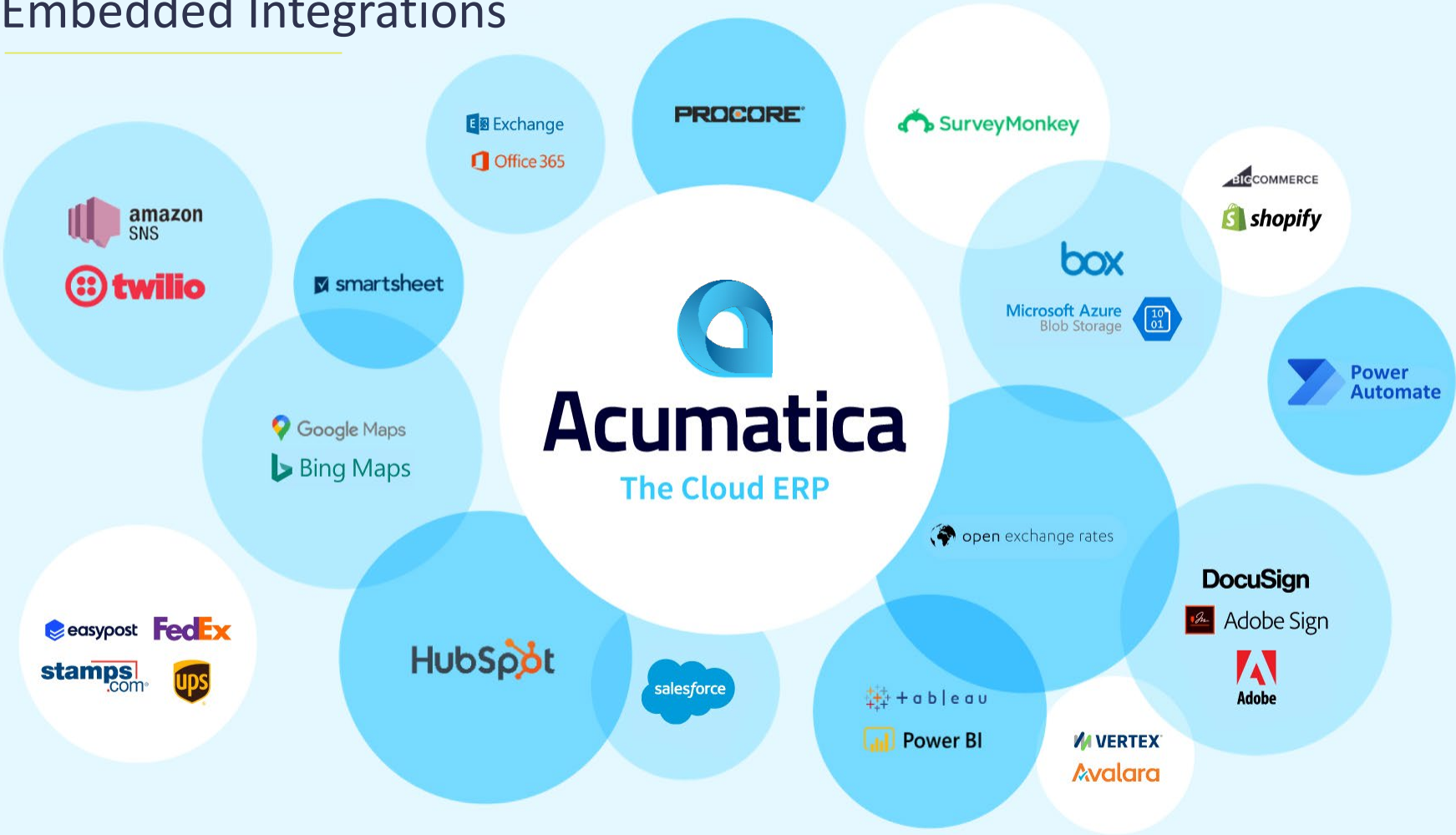


# Acumatica Platform



A powerful and flexible open platform that can easily extend and connect to other systems opening new possibilities for ERP

# Embedded Integrations



# Audience Poll

Is your company getting accurate and timely reporting out of your current ERP?

- Yes
- No



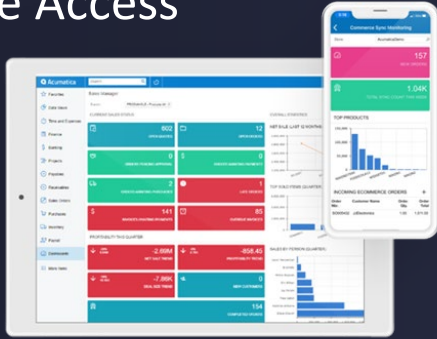


# Complete Security and High Availability

- Enterprise-grade security features such as server-side logic, detailed access controls, and robust authentication are built in.
- Complete model for all aspects of the applications, data, reports and devices.
- The system is always up and available with automated backups and multi-zone disaster recovery.
- Built on the world's most secure infrastructure provider.

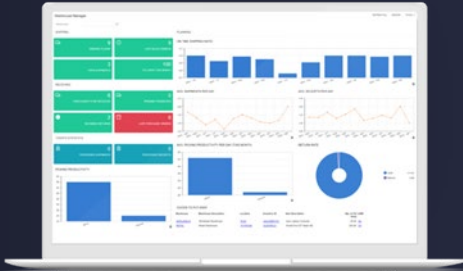


## Remote Access



- Access from anywhere on any device in natural language – optimized for collaboration.

## AI and Machine Learning



- Adaptable platform with open APIs enabling easy integration of the latest AI and machine learning technologies.



# Audience Poll

How comfortable is your company with embracing artificial intelligence?

- 1 - Very comfortable
- 2 - Somewhat comfortable
- 3 - We aren't sure yet
- 4 - Somewhat uncomfortable
- 5 - Not at all comfortable



# Customer Bill of Rights

Upholding these rights is core to who Acumatica is as a company and what we stand for as a community.

1

A software and services proposal with **clear fee structures**, and no surprises

2

**Unlimited user access** without having to purchase user licenses

3

**Fully adapt and customize** the solution to meet your evolving business requirements

4

Transparent, fair pricing and agreements **without long term commitments**

5

Deploy the solution on a **public or private cloud**

6

An open platform with **robust APIs** to rapidly integrate your other systems

7

A complete **security model** that covers your application access, data, reports, and devices

8

Own and access your data, now and always – in full, **usable data formats**

9

Take advantage of all knowledge and resources developed across a **broad community** of employees, partners, and customers

10

**Professional online training** that is free and comprehensive



# Thank you!

*Nancy Bielke*

*[nancy.bielke@CLAconnect.com](mailto:nancy.bielke@CLAconnect.com)*

*612-714-9746*

*Robert Jacobs*

*[robert.jacobs@CLAconnect.com](mailto:robert.jacobs@CLAconnect.com)*

*980-366-0384*



CLAconnect.com



CPAs | CONSULTANTS | WEALTH ADVISORS

©2024 CliftonLarsonAllen LLP. CLA (CliftonLarsonAllen LLP) is an independent network member of CLA Global. See [CLAglobal.com/disclaimer](https://www.claglobal.com/disclaimer). Investment advisory services are offered through CliftonLarsonAllen Wealth Advisors, LLC, an SEC-registered investment advisor.