Acumatica Cloud ERP Training Course

Professional Development Training Course Outline

Category	Enterprise Resource Planning (ERP)	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In the current landscape of digital transformation and aggressive cloud adoption, modern businesses require an agile and unified Enterprise Resource Planning (ERP) platform to drive efficiency, ensure business continuity, and foster sustainable growth. Acumatica Cloud ERP, known for its user-friendly interface and unique, resource-based licensing model, has emerged as a disruptive force for mid-sized companies seeking a truly integrated business management solution. Acumatica Cloud ERP Training Course is engineered to equip participants with the hands-on expertise to fully leverage Acumatica's modular architecture encompassing Financial Management, Supply Chain, CRM, and industry-specific capabilities. Upon completion, participants will be prepared to implement, configure, and manage the system, maximizing ROI and championing process automation within their organizations to maintain a competitive advantage.

The program moves beyond basic user instruction, focusing on practical application, system customization, and leveraging advanced features like AI-powered analytics and seamless third-party integrations. We provide a deep dive into using the Acumatica Cloud xRP Platform for tailoring solutions and improving data-driven decision-making. The training utilizes a blended learning methodology that combines interactive, instructor-led sessions with real-world case studies and a dedicated sandbox environment for authentic skill development. This structured approach ensures every trainee from end-users to ERP consultants and system administrators gains the proficiency to transform their company's operations into a cohesive, highly efficient, and future-proof digital enterprise.

Programme Curriculum

Acumatica Cloud ERP Training Course

Introduction

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Course Duration

5 days

Course Objectives

1. Master the Acumatica UI and core navigation for daily operations.
2. Perform accurate Financial Management including GL, AP, and AR automation.
3. Optimize Distribution Management processes from procurement to fulfillment.
4. Configure and utilize Project Accounting for real-time profitability tracking.
5. Implement Supply Chain Optimization strategies using advanced inventory tools.
6. Leverage Integrated CRM capabilities for a 360-degree view of customers.
7. Design and customize Role-Based Dashboards for data-driven decision-making.
8. Understand the Acumatica Cloud xRP Platform for robust system customization.
9. Develop proficient Report Writing and Business Intelligence (BI) Analytics skills.
10. Execute successful data migration and system go-live procedures.
11. Troubleshoot common system issues and manage user security permissions.
12. Integrate Acumatica with key eCommerce and third-party applications.
13. Apply AI-Powered Automation features to streamline complex workflows.

Target Audience

1. ERP Consultants and Implementation Specialists
2. System Administrators and IT Managers
3. Financial Controllers and Accounting Professionals
4. Supply Chain Managers and Logistics Coordinators
5. Project Managers (using Project Accounting)
6. Advanced End-Users and Department Heads
7. Business Analysts and Process Improvement Leads
8. Developers interested in the Cloud xRP Platform

Course Modules

Module 1: Platform & Core System Navigation

- Acumatica User Interface (UI) and Workspace Management
- Managing Security Roles and User Permissions
- Designing personalized Role-Based Dashboards
- Understanding the Cloud xRP Platform architecture
- Case Study: Configuring custom user roles and permissions for a new hire across Finance and Distribution departments.

Module 2: Financial Management Essentials

- Configuration of the General Ledger and Chart of Accounts
- Mastering Accounts Payable (AP) and Vendor Management
- Efficient Accounts Receivable (AR) and Customer Management
- Executing period-end closings and financial reporting
- Case Study: Automating the invoice approval workflow in AP, reducing processing time by 40% for a mid-sized retailer.

Module 3: Distribution and Inventory Management

- Configuration of Warehouses and Inventory Settings
- Mastering Sales Order (SO) and Purchase Order (PO) lifecycles
- Advanced Stock Management and Replenishment Logic
- Utilizing Warehouse Management System (WMS) features
- Case Study: Implementing automated minimum-stock replenishment for a multi-warehouse distributor to prevent stockouts during peak season.

Module 4: Project Accounting & Management

- Setting up Projects, tasks, and project budgets
- Managing Time & Expenses for project profitability
- Processing project billing, revenue recognition, and cost control
- Integrating projects with GL, AP, and Inventory
- Case Study: Tracking the actual vs. budgeted costs for a professional services firm's client implementation, identifying a 15% margin improvement opportunity.

Module 5: Customer Relationship Management (CRM)

- Managing Leads, Opportunities, and Sales Pipelines
- Implementing Marketing Automation within Acumatica CRM
- Customer Service Case Management and support workflows
- Generating 360-Degree Customer Views
- Case Study: Using integrated CRM to correlate sales opportunities with project profitability data for strategic account planning.

Module 6: Business Intelligence (BI) and Reporting

- Creating and modifying reports with the Report Designer
- Using Generic Inquiries for custom data extraction
- Developing BI Dashboards with visual KPIs
- Leveraging AI-powered analytics for predictive insights

- Case Study: Building a "CFO Dashboard" to track key financial KPIs in real-time, pulling data from GL, AR, and Project Accounting.

Module 7: Customization and Integration

- Introduction to the Customization Project Editor
- Extending business logic via the Acumatica Framework
- Integration using the Web Service API and xRP Platform
- Managing data flow with the Import/Export Scenarios tool
- Case Study: Creating a custom field and business event to automatically trigger an email notification upon a high-value sales order approval.

Module 8: System Administration and Maintenance

- Performing Data Migration and cleansing strategies
- Managing system upgrades and Cloud Deployment options
- Advanced User Security configuration and audit trails
- Backup, recovery, and business continuity planning
- Case Study: Developing a comprehensive go-live checklist and data validation plan for a successful ERP implementation transition.

Training Methodology

This course employs a participatory and hands-on approach to ensure practical learning, including:

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

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