



Acumatica with Dimensions

The Cloud ERP for the Financing Industry

Acumatica Cloud ERP with Dimensions for Financing provides the best business management solution for transforming your company to thrive in the new digital economy through leading-edge technology, best-in-class business functionality, and customer-friendly business practices.

Equipped with a full suite of front-office functionality required for your financing operations, from managing leads, loan management for inventory-sales financing, and collateral-based loan financing to ROPOA and loans payable management, Acumatica with Dimensions for Financing manages them all on any device.

Deliver advanced financing management solutions, effective controls, and efficient operations. Designed for the way businesses operate today and in the future.

Connected Business. Delivered.

Financing Processes

Streamline the financing business processes, delivering automation without complexity, compliance without rigidity, and continuous improvement without unpredictability.



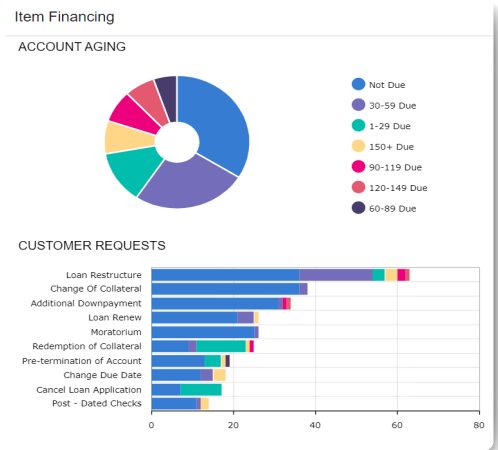
Stay Ahead of the Competition and Lead with Confidence

Track Opportunities, Efficient Controls, and Smart Decisions

End-to-End Visibility - Gain real-time insight into your financing business— from revenue and margins to loan quality and customer satisfaction — allowing for faster, location-independent decisions. Integrated CRM data helps nurture leads and streamline contract creation for higher conversions.

Flexible Investments and Acquisitions - Speed up loan approvals with robust governance. Access the platform from any web-enabled device to make timely financial decisions, ensuring smooth handling of unpredictable loan processes.

Powerful Business Insights - Get actionable insights with personalized dashboards, offering 24/7 access to real-time data. Monitor cash flow, analyze trends, and track KPIs for optimized decision-making.



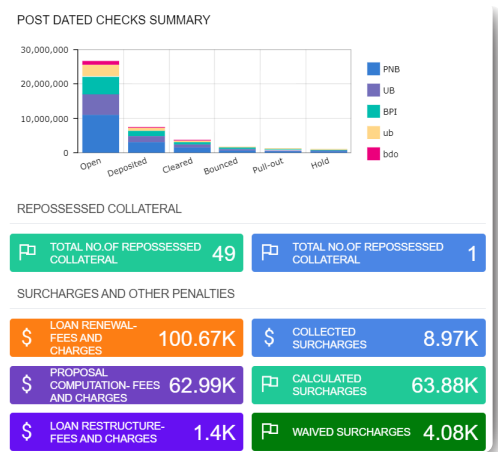
Real-time Financial Management Solutions

Accurate & Real-Time Reporting, Analytic Capabilities, Risk Monitoring, and Audit Records

Streamline Data Entry - Track receivables, ensure accurate billing, and prevent duplication, errors, and late payments. Improve operational efficiency by enhancing accuracy and timeliness in your financing processes.

Efficient Financing System - Simplify rate calculations, manage costs across financing chains, and configure multiple schemes. Utilize a comprehensive amortization schedule to easily monitor payments and track balances.

Minimize Risks - Address complex financial requirements like planning, investing, and compliance. Efficiently manage delinquent accounts, repossess collateral, and convert assets, with clear visibility into redemption periods.



Enhance Productivity - Manage inventory and fixed assets from acquisition to disposal, automating depreciation and valuation methods. Streamline book closing with automated workflows.

Efficient Operations & Exceed Customer Expectations

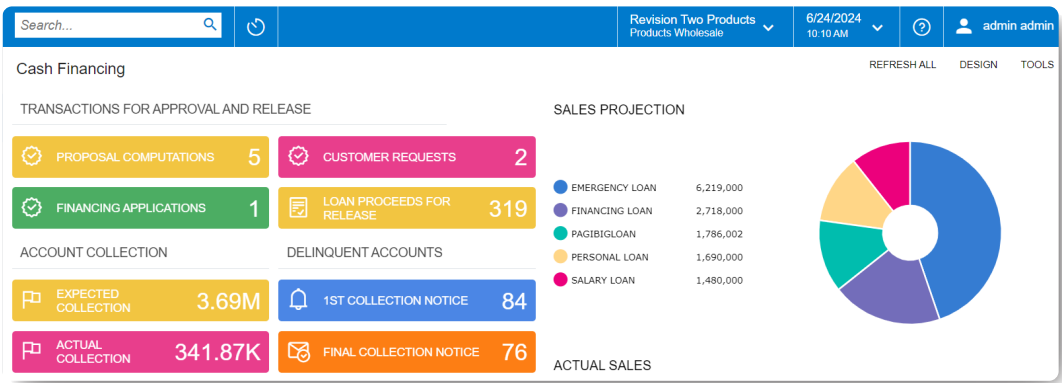
Faster Sales Cycle, Elevate Customer Interactions, and Advance Financial Automation

Accelerate Financing Process - Streamline loan processing with an automated platform that allows you to select financing types, set terms, and generate amortization schedules tailored to customer preferences. Approve or decline applications quickly with minimal input.

Powerful Financial Integration - Integrate seamlessly with Acumatica's financial module, automatically generating pro forma accounting entries to reduce errors. Enable teams to access customer statements and reports through customized workflows and approval processes.

Enhance Collections - Improve billing accuracy and prompt collections by defining demand letter levels for all contracts. Set up automated warnings like collection notices, final demands, and repossession alerts to manage financial risks effectively.

Boost Customer Satisfaction - Deliver accurate, timely information to enhance financial services. Address inquiries quickly with a comprehensive customer ledger that displays all transactions, including payments, interest, and surcharges, in one unified system.



Customer friendly Tech Leadership on the Cloud

Flexible Deployment, Full Data Transparency, Open APIs, Enterprise Cloud Level Security

Data Ownership & Flexibility - You decide where to host your data: on the public cloud, in a private cloud, or on-premises. With Acumatica, your data is always secure and always in your control. You can do a full relational database export at any time.

Adaptable - Open APIs for ease of integration with a mobile framework that mirrors code-base changes. Role-based views and dashboards with simple low code/no code customizations.

Modern Security - Enterprise-grade security features such as server-side logic, detailed access controls, and robust multifactor authentication built-in.

Dimensions

Current

- Agriculture
- Facilities and Assets
- Financing
- Philippine Operations
- Real Estate Development

Coming soon

- Franchising
- Human Resource
- Insurance
- Utilities

Acumatica Cloud ERP

Industry Editions

- Manufacturing Edition
- Distribution Edition
- Retail Edition
- Construction Edition
- General Business Edition

Best-In-Class Modules

- Financial Management
- Customer Management
- Payroll
- Project Accounting
- Field Service Management
- Property Management

Acumatica Cloud Platform

Advanced Authentication

Multi-tenant

Low Code/No Code Framework

Cross-browser Support

Reporting & Analytics

Workflow

Role-based Security

Multi-language

Integration & Web Services

Mobile Framework

Visual Studio Templates

AI & ML

Tech Stack

Loan Management Module

Loan Management System - Automated system accelerates and simplifies loan processes. Computes balance and pre-termination fees faster.

Account Management - For customers who could not meet the payments on the provided data in the amortization schedule, the buyer may request and allow one or multiple due dates to be changed at once and may apply for a moratorium to exempt them from surcharge calculation or any other penalties.

Risk Management - Delinquent accounts that have been subjected to the repossession of collateral items to open again and allow the customer to resume payment for the account.

PDC Management - Three automated options can be done to post-dated checks: Hold, Pull-out, and Replace and sort accurately to take actions accordingly.

Loans Payable Management Module

Flexible Payment Terms - Provides flexibility in managing investor's payments and efficiently completing transactions, whether financing the total amount through a one-time or staggered payment. The system will then compute the full amortization to be paid for the following payment periods.

Loan Financing Roll-Over - For Loan Financing documents with the Balloon Payment amortization type, the principal amount can be rolled over and reloaned on the due date of its payment. In contrast, prior amortization due dates should be paid first before the roll-over.

Auto-generate Billing - Navigate the system quickly and capture all essential bills for billing covering the principal, interest, and insurance payments charge to the client.

Flexible Payment Forms - Enable your customer to pay bills easily through the Financing Bill form or directly to the Financing Settlements form.

Philippine Taxation Module Key Features

Easy to use interface - All the information drawn from the different branches of the company can easily be inputted in the user interface, allowing for quick setup for tax filing. The digital forms are easy to understand and necessary information can easily be encoded.

Withholding Taxes - These are immediately recognized upon invoicing or payment.

DAT File Generator - Readily available for Alphalist and Vat Relief to make electronic filing easy. Copies of BIR Form 2307 received by customers and vendors are monitored.

Full BIR Reporting - Different forms and templates are in the system making it easy to submit reports for internal revenue review.

Seamless integration with Acumatica Modules - The system is fully integrated to Inventory, Financial Management, Expense Management, and Project accounting, allowing for real-time updates when making changes in just one ledger.



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