



Acumatica
The Cloud ERP

FOR B2B DISTRIBUTORS

Understand the Cost of Your ERP Challenges

Evaluate an ERP solution with a partner that understands B2B distributors



THE FIELD GUIDE

Why B2B Distributors Choose C&A Technology as Their ERP Partner

Your Acumatica CloudERP partner for B2B distribution. Six challenges that quietly cost distributors money, a worksheet to put a number on each, and a checklist to decide if an ERP investment is justified.



IDENTIFY
YOUR CHALLENGES



QUANTIFY
THE COST



JUSTIFY
THE INVESTMENT



**A PARTNER
WHO UNDERSTANDS
B2B DISTRIBUTORS**

Talk to CAT: 844-533-4228

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Evaluate first. Invest with confidence.

The cost of an aging ERP is real and rarely visible. Manual orders, stock uncertainty, pricing gaps, and slow collections become “how we do things.” This guide helps you see them, price them, and decide with facts.



IDENTIFY

YOUR CHALLENGES

The business challenges affecting your performance. Most distributors sense that something is not working but cannot say which problem costs them the most, because the pain is spread across order entry, the warehouse, pricing, accounting and customer service. We start by naming it. This guide walks through the six challenges we see most often with B2B distributors, shows what each one looks like in daily work, and gives you questions to test it against your own business.



QUANTIFY

THE COST

Their financial cost and the potential value of addressing them. A problem you cannot put a number on is easy to ignore, and easy to put off. We turn each challenge into a financial figure: the labor, errors, delays and lost margin that today's workarounds create, and what removing them is worth. In your evaluation we build that picture together using your own data, so you can see the size of the opportunity without preparing anything in advance.



JUSTIFY

THE INVESTMENT

Whether expected improvements warrant an ERP investment. With the cost and the value in front of you, the question becomes straightforward: do the improvements outweigh the investment, and how quickly? We help you weigh the evidence, estimate payback and test any ERP partner with the right questions. The decision stays yours, and “not yet” is a perfectly good answer.



A PARTNER

WHO UNDERSTANDS B2B
DISTRIBUTORS

C&A Technology brings B2B distributor experience and Acumatica expertise to every step of your evaluation. We start from your goals, not from a software demo, and act as a business-value advisor, not only a reseller. The same team stays with you from the first conversation through go-live, so what we learn about your business is never lost along the way.

Why this order matters

Most ERP projects start with a software demo. We start with your goals: what is the problem, what does it cost, and is it worth solving? The technology follows. If the numbers do not justify a change, you have lost nothing and learned where your money goes.

6 major challenges affecting the performance and profitability of B2B distributors

Each challenge carries a cost. Make it visible before you invest.

01	Customer Buying Experience & Order Processing Are you making it harder than it should be for customers to buy from you?
02	Multi-Warehouse Inventory Availability & Order Allocation When several channels compete for the same inventory, which order wins?
03	Customer-Specific Pricing & Margin Protection How much margin are you losing because your prices can't keep up?
04	Customer Account Self-Service & Cash Flow Why make customers call you to pay you?
05	Order Tracking, Delivery Visibility & Customer Service "Where is my order?" should not need a phone call.
06	Landed Cost Accuracy & True Order Profitability Do you know what each order really earns?

Not sure where to begin? Count how many of the six you recognize. Two or more usually means the costs compound: a manual order is also a pricing risk, an inventory risk and a service call.

A note on scope. These are the challenges we see most often with B2B distribution customers. Your business may have others. The method in this guide works the same way for any of them.

01 Customer Buying Experience & Order Processing

Are you making it harder than it should be for customers to buy from you?

What it looks like

Orders arrive by email, phone and even fax, and someone re-keys every line. Customers cannot see their own pricing or stock before they order.

What it costs

- Order-entry labor and overtime
- Keying errors, returns and credits
- Slower fulfillment
- Sales you never see because buying is hard

How modern ERP helps

B2B self-service ordering that feeds the ERP directly, showing each customer's own pricing and live availability, with reorder from past orders.

Self-check

- What share of orders is typed in by your staff?
- How often do wrong items or quantities trigger a credit or return?
- Could a customer place a repeat order at 9 p.m. without calling you?

02 Multi-Warehouse Inventory Availability & Order Allocation

When several channels compete for the same inventory, which order wins?

What it looks like

Sales reps, distributor networks, your website and marketplaces draw on the same stock. Systems disagree about what is available, and allocation is decided by whoever shouts loudest.

What it costs

- Overselling and canceled orders
- Expedited shipments to fix mistakes
- Excess stock in one site, stockouts in another
- Your best customers served second

How modern ERP helps

One real-time view of stock across warehouses and channels, with allocation rules that reflect customer priority and business policy.

Self-check

- Can you see available-to-promise stock across every location right now?
- Who decides which order gets scarce stock, and how?
- How many orders did you cancel or expedite last quarter because of stock errors?

03 Customer-Specific Pricing & Margin Protection

How much margin are you losing because your prices can't keep up?

What it looks like

Contract prices, volume breaks, and customer-specific lists live in spreadsheets and people's heads. Cost changes do not reach the price list on time.

What it costs

- Quotes below target margin
- Costs that rise while prices stay put
- Time spent checking and correcting prices
- Disputes and credits over wrong prices

How modern ERP helps

Customer-specific price lists, volume tiers and rules held in the ERP and applied automatically at quote and order, with margin visible before you commit.

Self-check

- Where do your customer prices live today?
- How quickly does a supplier cost increase reach your selling price?
- Can a rep see margin on a quote before sending it?

04 Customer Account Self-Service & Cash Flow

Why make customers call you to pay you?

What it looks like

Customers phone or email to get invoices, check balances, and arrange payment. Your team answers the same questions every day, and collections follow the same slow path.

What it costs

- Staff time on invoice and balance inquiries
- Longer collection cycles and higher days sales outstanding
- Cash tied up in receivables
- Frustrated customers

How modern ERP helps

A customer portal where buyers see invoices, balances and order history, and pay online, with payments posting straight to the ledger.

Self-check

- How many invoice or balance requests does your team handle each week?
- What is your current days sales outstanding, and what drives it?
- Can a customer pay an invoice online today?



05 Order Tracking, Delivery Visibility & Customer Service

"Where is my order?" should not require a phone call.

What it looks like

Shipping status sits in the warehouse, the carrier site and a service rep's inbox. Customers chase you for updates, and your team chases the carrier.

What it costs

- Service time spent on status calls
- Missed delivery promises
- Lost repeat business after a bad delivery
- No single view of the customer's orders

How modern ERP helps

Order status, shipment tracking and delivery details visible to your team and to customers in one place, from the same system that processed the order.

Self-check

- How many "where is my order" calls do you take per week?
- Can a service rep see order, shipment and invoice on one screen? Do
- customers get automatic shipping notifications?

06 Landed Cost Accuracy & True Order Profitability

Do you know what each order really earns?

What it looks like

Freight, duty, handling and other costs of getting product to your dock are averaged or left out. Margin looks healthy on paper and is thinner in reality.

What it costs

- Items priced on incomplete cost
- Unprofitable customers and orders hidden in averages
- Poor buying and pricing decisions
- Surprises at month-end

How modern ERP helps

Landed cost captured per receipt and carried into inventory cost, so margin by item, order and customer reflects the real cost of the goods.

Self-check

- Which costs are included in your item cost today?
- Can you see profit by order and by customer, not only by month?
- How often do you reprice after discovering a real cost?



How we quantify the cost with you

This is the approach CAT uses in your ERP evaluation. We build it with you, using your own numbers, so there is nothing to prepare in advance.

	What we measure	How we calculate it
01	Order handling	Manual orders per week ÷ minutes per order ÷ 60 × loaded hourly rate × 52 = labor. Add: error orders per year × cost to fix each.
02	Inventory & allocation	Canceled, delayed or expedited orders per year × (expedite cost + lost margin + handling).
03	Pricing & margin	Orders sold off-price per year × average margin gap. Or: annual revenue × estimated margin leakage %.
04	Self-service & cash flow	(Annual revenue ÷ 365) × days of DSO you could recover × your cost of capital. Add: weekly inquiry hours × rate × 52.
05	Order visibility	Status calls per week × minutes per call ÷ 60 × loaded hourly rate × 52.
06	Landed cost	Annual purchases × % of freight, duty and fees not in item cost = margin you are overstating.

What we do together

- Gather a few numbers from your team
- Apply the method to each of the six challenges
- Pressure-test every assumption
- Leave you with one clear cost picture

What you bring

- A rough idea of your order and invoice volumes
- The people who know how orders really move
- An open mind about what the numbers show

No spreadsheets to fill in. No homework.

In your ERP evaluation, the CAT team walks through each number with you and builds the cost picture in a single working session.

Is an ERP investment justified?

Answer the six statements. Mostly, "Yes" means the evidence supports a deeper evaluation. Mostly, "No" means you may be better off fixing the process first, and that is a useful result too.

Statement	Your answer
The cost of these challenges is meaningful relative to your annual profit.	Yes / No
At least three of the six challenges are a daily reality in your business.	Yes / No
Your current system cannot be fixed with settings or a small add-on.	Yes / No
Customers or staff have told you the way you work together is hard.	Yes / No
You expect to grow, add warehouses, channels or customers in the next three years.	Yes / No
You have an owner for the decision and a realistic window to act.	Yes / No

Build the business case in four lines

1. Annual cost

Total from your worksheet.

2. Recoverable share

What portion you could realistically remove. Be conservative.

3. Total investment

Software, implementation, training and your team's time.

4. Payback

$\text{Investment} \div (\text{annual cost} \times \text{recoverable share})$.

Decide with a range, not a point. Run the four lines with a cautious, expected and optimistic recoverable share. If payback is acceptable even in the cautious case, you can invest with confidence.

Include what the spreadsheet cannot show: faster customer response, the ability to take on new channels, fewer surprises at month-end, and a platform that grows with you.

Seven questions to ask any ERP partner

The software matters. The partner who implements it matters just as much. Use these questions with every vendor you consider, including us.

1. Do you have a track record with B2B distributors like us? Can we talk to one?
2. How will you learn our pricing, warehouse and customer rules before proposing anything?
3. Which of my six challenges will the solution address first, and how will we measure it?
4. What is the total cost of ownership over three to five years, including implementation and support?
5. How does the system connect to our website, customer portal, carriers and marketplaces?
6. Who will be on my implementation team, and who supports us after go-live?
7. What happens to our data and our people during the transition?

What to listen for

Good signs

- They ask about your goals before showing a product
- They talk in your terms: orders, margin, DSO
- They put numbers beside claims

Warning signs

- A demo before any discovery
- Vague answers on total cost
- Pressure to decide quickly

A partner that understands B2B distributors

C&A Technology (CAT) is an Acumatica Cloud ERP partner that specializes in B2B distribution. We help you identify the challenges, quantify their impact and decide whether an investment is justified, before we talk about software.

Built for the way distributors work

Acumatica is a cloud ERP with distribution at its core. Here is how its capabilities line up with the six challenges.

Challenge	What to look at in Acumatica
01 Buying & orders	B2B ordering and eCommerce connections that feed orders straight into the ERP
02 Inventory	Multi-warehouse inventory and order allocation in one system
03 Pricing	Customer-specific price lists, price rules and margin visibility
04 Self-service	Customer portal for invoices, balances and payments
05 Tracking	Order, shipment and invoice history in one record
06 Landed cost	Landed cost capture so item cost and margin reflect the real cost

Capabilities depend on edition and configuration. CAT confirms fit against your requirements during the evaluation.

Cloud and open

Browser-based access from anywhere and an open platform for connecting the tools you already use.

Licensing by usage

Licensed by resources used rather than per user, so adding people does not raise the software price.

One platform

Financials, distribution, CRM and reporting on a single database.

What successful distributors do

They put a price on their challenges first. They choose a partner who knows distribution. They invest when the numbers support it, and not before.

YOUR NEXT STEP

Bring your challenges to a conversation with CAT

You have identified the challenges. The CAT team will help you put a number on each, see where the cost is highest, and decide whether an ERP investment makes sense. If it does not, we will tell you.

Talk to CAT

[Call](#)**844-533-4228**[Learn more](#)catechnology.com/erp-evaluation-for-b2b-distributors

What happens next

1. A short call to understand your business and your goals
2. Review your worksheet and pressure-test the numbers
3. A clear view of the cost, the value and whether to proceed

Evaluate first. Invest with confidence.