Integrating AI into Acumatica GI's and Beyond

Unlocking the Power of AI-Driven Insights for Smarter Decision-Making

Acumatica
The Cloud **ERP**

Table of Contents

I. Introduction

Acumatica's Generic Inquiries (GIs) offer valuable data management capabilities, but businesses often find themselves limited by slow reporting processes, complex setups and static insights. While these tools provide a solid foundation, they may not fully meet the demands of today's dynamic business landscape.

Enter ConverSight—the smarter solution to maximize the potential of your Acumatica data. Whether you want to enhance your GIs or move beyond their limitations, ConverSight delivers instant reporting, real-time insights, and on-demand analytics that transform decision-making.

This whitepaper highlights how ConverSight simplifies inventory management, procurement and forecasting, making it easier and more powerful than ever to harness your Acumatica data. ConverSight empowers businesses to drive efficiency, agility and smarter decisions.

2. Challenges Facing Mid-Sized Bussiness

Despite technological advancements, mid-sized organizations across industries continue to face significant challenges in optimizing ERP workflows. Enterprise Resource Planning (ERP) systems, such as Acumatica, have streamlined operations in theory; however, in practice, workflow complexities and data accessibility issues remain barriers to success for many businesses.

> *While ERPs centralize data, the challenge lies in leveraging that data efficiently. Manual processes, reporting gaps, and user adaptability often hinder businesses from extracting the full value of their ERP investment.*

Gartner.

- **70% of mid-sized businesses report difficulties managing ERP workflows,** particularly processes like Generic Inquiries (GIs), which are critical for data retrieval and reporting.

- Industries such as manufacturing, retail and distribution face the greatest ERP struggles due to fragmented systems, manual interventions and complex reporting needs.

- According to a survey, **64% of supply chain organizations still lack real-time visibility** into their operations, resulting in delays, inefficiencies, and missed growth opportunities.

Additionally, integrating GIs with other systems often results in data inconsistencies and performance issues, while insufficient user adoption further limits their effectiveness. Industries such as manufacturing, retail, distribution and supply chain are the hardest hit, as they deal with large volumes of data, complex workflows, and frequent changes in inventory or product specifications. On the other hand, industries like technology, healthcare and manufacturing and wholesale are adopting ERP solutions more rapidly, especially those with advanced capabilities like AI and automation to simplify complex GI workflows.

3. The Challenges of Acumatica GIs

Acumatica's General Inquiries (GIs) provide a flexible framework for extracting, organizing and analyzing data within the ERP system. These tools allow users to query and report on critical business metrics, offering a foundation for informed decision-making. However, the inherent limitations of GIs can hinder their effectiveness:

1. Complexity of Manual Setup

Creating and managing GIs often requires a deep understanding of Acumatica's architecture and data relationships. This dependency on technical expertise can slow down processes, especially for businesses without dedicated IT teams.

2. Delayed Insights

While GIs are powerful, they rely heavily on manual configuration and reporting cycles. This delay in data analysis can impede timely decision-making, particularly in fast-moving industries.

3. Lack of Predictive Analytics

GIs excel at providing historical and real-time data snapshots, but they lack the forecasting and predictive capabilities businesses need to anticipate future trends and prepare for changing market conditions.

4. Siloed Data Ecosystem

Acumatica's GIs primarily focus on internal ERP data. For businesses leveraging multiple platforms (e.g., CRM, e-commerce, logistics), the lack of cross-platform integration can lead to fragmented insights and missed opportunities.

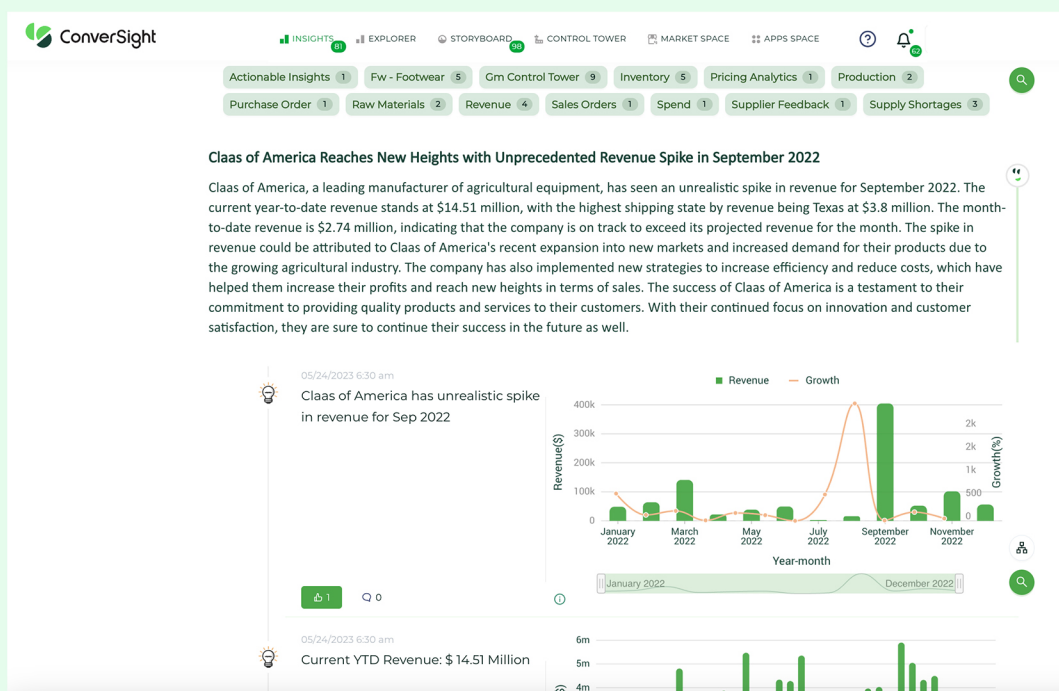# 4. ConverSight Automates GIs for Decision Intelligence

ConverSight offers an innovative solution to these challenges by integrating directly with Acumatica. ConverSight`s AI-powered platform transforms raw data into clear, actionable insights, providing Acumatica users with a real-time view of their business performance. Here's how ConverSight helps businesses overcome data challenges:

1. Instant, Real-Time Reporting

Acumatica GIs allows users to generate reports, but these reports often take time to compile and are sometimes outdated. This delay can hinder quick decision-making, especially in fast-paced business environments. ConverSight addresses this challenge by providing instant reporting with real-time updates. Whether you're analyzing sales, inventory or financial performance, ConverSight ensures that the data you see is always up-to-date and accurate.
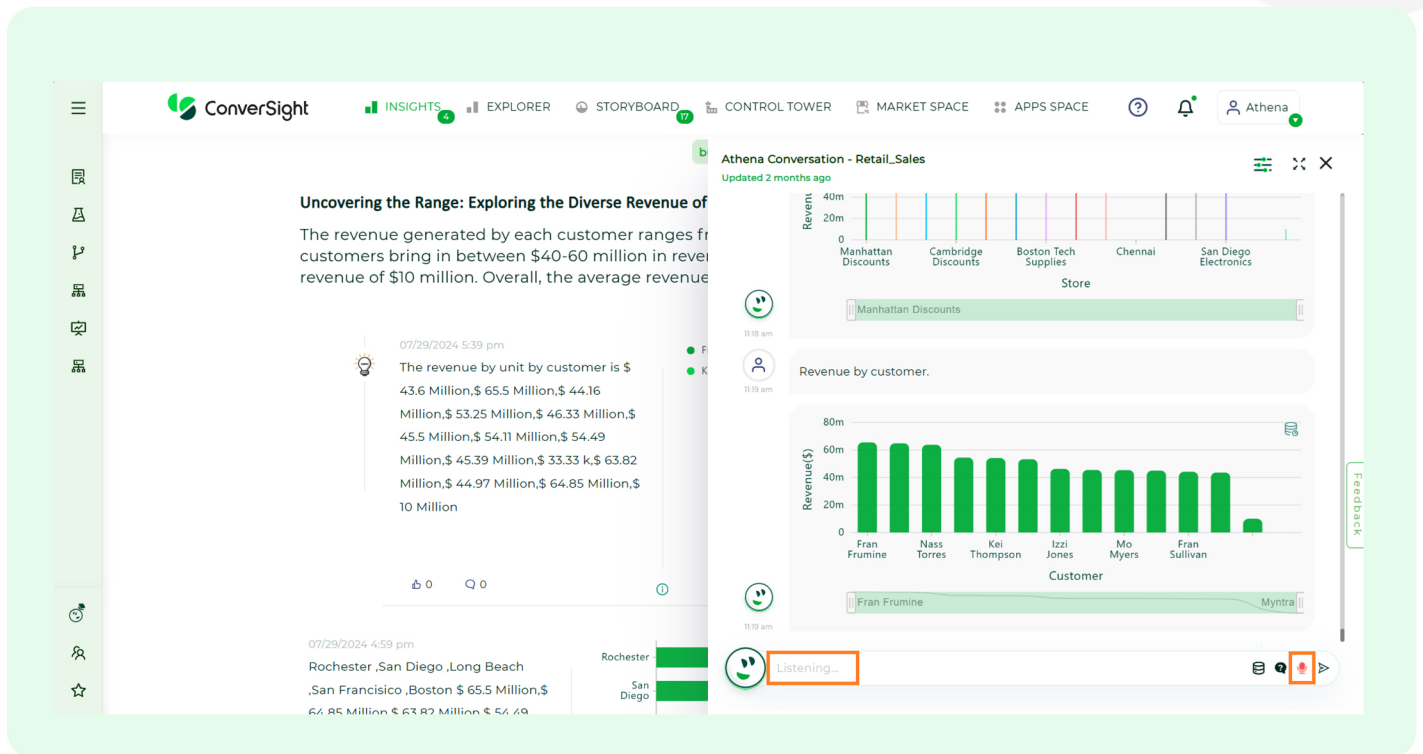
2. AI-Powered Insights

While GIs provide valuable data views, they often fall short of analyzing data trends and offering actionable insights. ConverSight leverages AI-powered analytics to go beyond simple data presentation. It applies advanced machine learning algorithms to identify patterns, trends and correlations in the data.

ConverSight's AI algorithms help users uncover hidden insights in their data that might not be immediately apparent through Acumatica GIs.
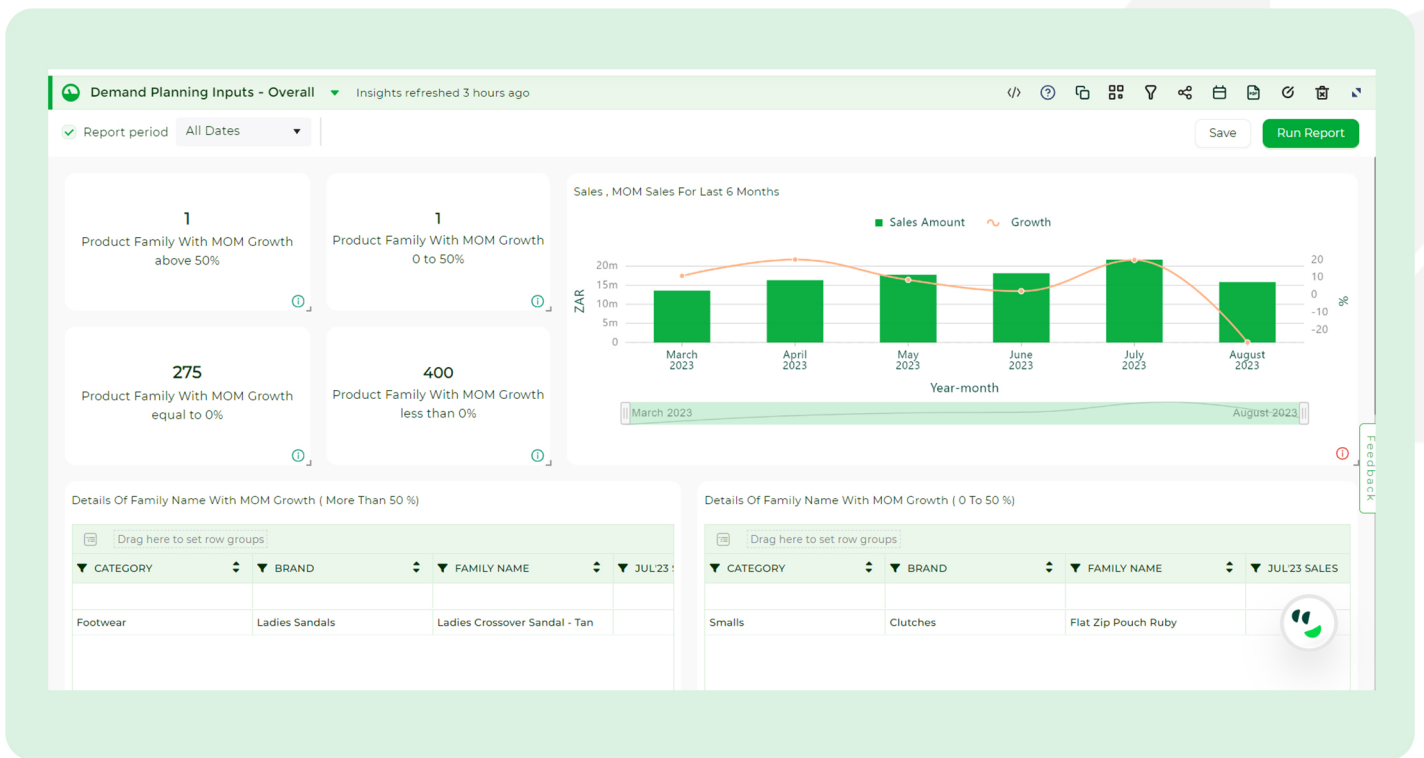
3. Conversational AI with Athena

Acumatica GIs require users to manually search for and query data, which can be time-consuming and require familiarity with the platform. ConverSight's conversational AI assistant, Athena, makes data analysis more accessible by allowing users to ask questions in natural language and receive instant, accurate responses. Athena can process complex queries and deliver insights in seconds, such as, **"What is the status of my inventory?"** or **"Which products are underperforming?".**

Athena simplifies data interaction, removing the need for complex queries or in-depth technical knowledge. Users can simply ask questions, and Athena provides clear, understandable answers in real-time. This empowers decision-makers to access data quickly without having to navigate multiple screens or manually pull reports.

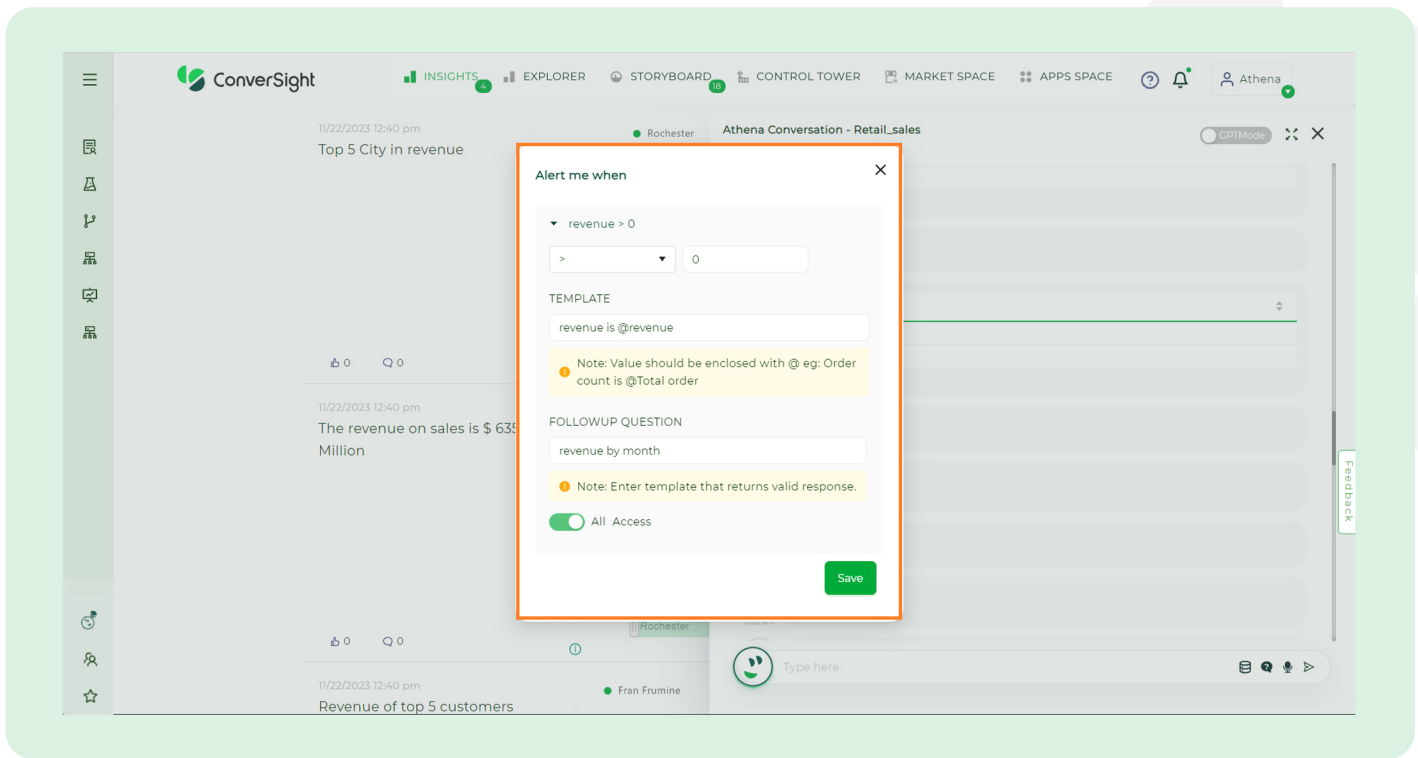## 4. Enhanced Forecasting and Predictive Analytics

Acumatica GIs offer limited forecasting capabilities, typically relying on historical data without accounting for external factors or future trends. ConverSight's predictive analytics tools go beyond historical analysis, using AI and machine learning to forecast future trends in demand, inventory, sales and even customer behavior. These tools take into account variables such as market trends, external conditions, and internal factors (e.g., marketing campaigns) to generate highly accurate forecasts.

With ConverSight, businesses can move from reactive decision-making to a more proactive approach. Predictive analytics help businesses anticipate demand fluctuations, inventory shortages and market changes before they occur. This results in more efficient planning, optimized inventory levels, and reduced costs.

5. Real-Time Alerts and Notifications

Acumatica GIs typically provide static views of data without offering proactive notifications when key metrics change. ConverSight enhances this by providing customizable real-time alerts that notify users when significant changes occur in their business. For example, users can set up alerts to monitor inventory levels, sales trends, customer satisfaction scores or cash flow. If any metric goes beyond a preset threshold—such as an inventory shortage or a drop in sales—ConverSight instantly notifies the user.

Real-time alerts ensure that decision-makers are always aware of critical developments, allowing them to respond to issues immediately. This helps prevent problems from escalating, minimizes risks and ensures that businesses can act quickly to address any operational challenges.
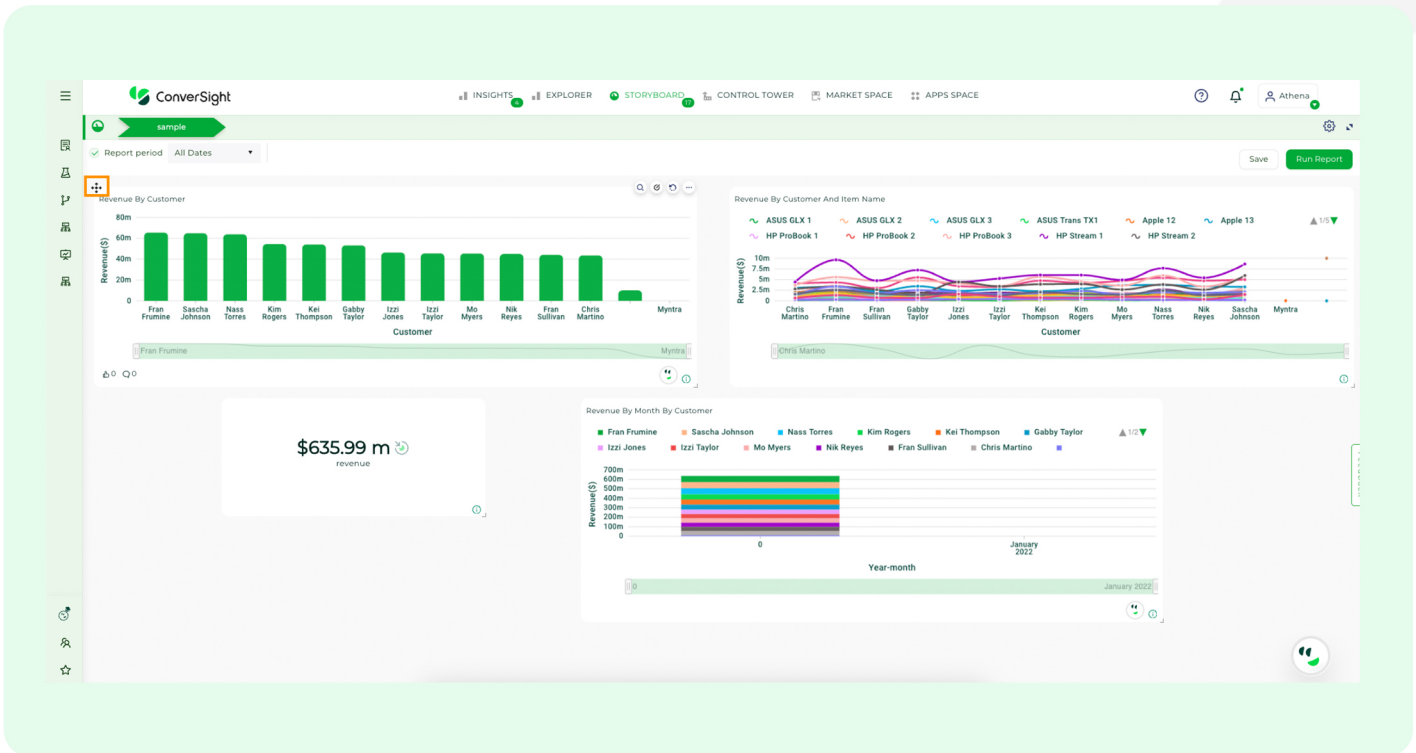
6. Streamlined Data Access and Integration

Acumatica GIs are typically confined to specific modules and data sources within the system. This can result in fragmented information and requires users to manually navigate across different systems or dashboards to get a full view of business performance. ConverSight addresses this limitation by offering seamless integration with all of Acumatica's data sources and providing a unified view of key business metrics.

By consolidating all data points in one place, ConverSight eliminates the need for employees to access multiple systems to gather information. This streamlined data access not only saves time but also ensures that users are working with a comprehensive, holistic view of their business operations, enabling them to make more informed decisions.

7. Customizable Dashboards and Reports

Acumatica GIs offer standard reports and dashboards, but they may not fully align with the specific needs of every user or department. ConverSight enhances this by offering customizable dashboards that can be tailored to the unique needs of each user or team. Whether you need to track financial KPIs, sales performance or inventory levels, users can design their dashboards to display only the most relevant metrics for their roles.

Customizable dashboards allow users to focus on the metrics that matter most to their specific responsibilities. This increases efficiency, as users don't have to sift through irrelevant data. Additionally, custom reports can be scheduled and delivered automatically, ensuring that key stakeholders receive the information they need on time, every time.

8. Simplified User Experience

While Acumatica's GIs require users to have a certain level of expertise to extract and understand data, ConverSight simplifies the user experience with an intuitive interface and user-friendly features. Whether it's navigating through reports, customizing dashboards or setting up alerts, ConverSight ensures that users at all levels of technical ability can easily interact with and understand their data. A more intuitive interface makes it easier for all employees—whether they are data experts or not—to access and analyze business data. This reduces the need for extensive training and ensures that everyone can make data-driven decisions without a steep learning curve.

5. How ConverSight Benefits Acumatica

- **No More Custom GIs, Only Seamless Automation:** Skip the hassle of building and maintaining complex Generic Inquiries. ConverSight automates and simplifies the process, allowing your team to concentrate on growing the business.

- **Decisions at the Speed of Business:** Access real-time data and actionable insights instantly. Make informed decisions faster and drive better outcomes with confidence.

- **Effortless Inventory Management:** From tracking stock levels to optimizing procurement, ConverSight streamlines inventory processes to maximize efficiency and reduce costs.

- **Stay Ahead of the Risks:** Predictive analytics and instant alerts keep you informed of potential challenges, ensuring you're always prepared to act proactively.

- **AI for Everyone:** With Athena, ConverSight's conversational AI, your team can gain meaningful insights and make smart decisions without needing deep technical expertise.

6. Conclusion

The combination of Acumatica's robust ERP capabilities and ConverSight's AI-driven insights transforms how businesses manage and utilize their data. By enhancing Generic Inquiries, ConverSight empowers Acumatica users to move beyond basic reporting, enabling real-time decision-making, advanced forecasting and streamlined operations.

Unlock the full potential of your data and gain a competitive edge with ConverSight for Acumatica—where data intelligence meets operational excellence. Take control of your data today. Book your personalized **Demo now!**

Join our customers who have accelerated growth with ConverSight

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LEADER PROMOS

About ConverSight

ConverSight is the category creator in Unified Decision Intelligence. Bringing together generative AI and advanced analytics without the traditional complexity of data science in one unified platform, so businesses can make better decisions. ConverSight's unified decision intelligence platform provides AI-powered instant custom reporting, demand forecasting, and inventory optimization using seamlessly integrated data from Acumatica and other business tools. ConverSight is an Acumatica partner, working closely with Acumatica Value Added Resellers (VARs), like at Net at Work, DSD, and Practical Software. ConverSight was named a Gartner Cool Vendor, Supply & Demand Chain Executive (SDCE) Top Software and Technology Solution 2024, and winner of the 2024 AI Breakthrough Award. Connect with ConverSight on LinkedIn, Instagram, Facebook, Youtube, tune in to the Data Insights Podcast, or visit **www.conversight.ai** to learn more.