



ConverSight AI Decision Intelligence for Acumatica

Bringing Agentic AI, Conversational Analytics, and an Autonomous AI Workforce to Every Acumatica User

Acumatica Technology Partner | Net at Work · DSD · Practical Software

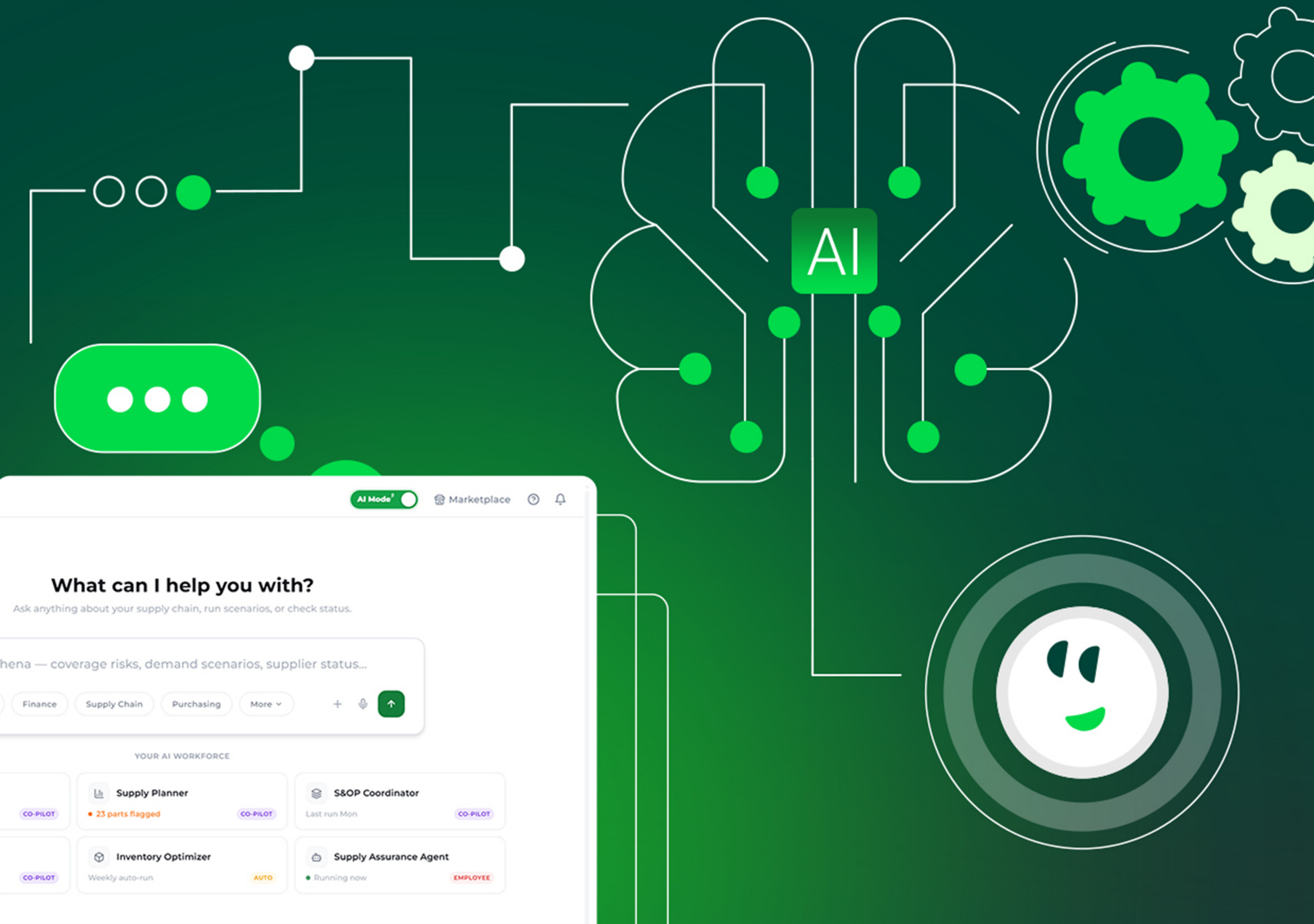




Table of Contents

1. Executive Summary	02
2. Acumatica + ConverSight - Stronger Together	02
3. Four Levels of Agentic Intelligence	03
4. Your AI Workforce - Six Specialist Agents	04
5. Platform Capabilities in Depth	05
6. Built for Acumatica's Core Industries	06
7. Implementation - Live in Days, Not Months	07
8. Why ConverSight for Acumatica	08
9. The Next Step for Your Acumatica Investment	09



1. Executive Summary

Acumatica Cloud ERP gives businesses a powerful operational foundation — structured data, connected workflows, and a reliable system of record for every department. ConverSight integrates Decision Intelligence and Agentic AI directly with Acumatica, transforming operational data into instant answers, automated insights, and

The result: Acumatica users don't just see their data — they get a team of AI specialists working alongside them. Demand Planners. Supply Planners. Procurement Agents. Inventory Optimizers. All powered by Acumatica data. All working continuously on your behalf.

2. Acumatica + Conversight - Stronger Together

Acumatica Cloud ERP gives businesses a powerful operational foundation — structured data, connected workflows, and a reliable system of record for every department. ConverSight integrates Decision Intelligence and Agentic AI directly with Acumatica, transforming operational data into instant answers, automated insights, and

Category	Acumatica + ConverSight
Reporting	Conversational AI + self-service Explorer + automated AI briefings
Analytics	AI Insights, Story Boards, natural-language questions answered instantly
Supply chain action	AI Agents that plan, flag, recommend, and execute autonomously
Alerts & monitoring	Smart threshold alerts + proactive AI briefings delivered automatically
Decision support	Athena asks AND answers — with recommended actions and rationale
User experience	Everyone — from executives to analysts — asks in plain language

3. Four Levels Of Agentic Intelligence

ConverSight brings four progressively powerful levels of AI interaction to every Acumatica user. Organizations can start at Level 1 and activate higher levels as their confidence in AI grows. All four levels are powered directly by Acumatica data.

Level 1: Assistant - Instant answers on demand

- Ask any supply chain question in plain language — inventory levels, order status, supplier performance, demand trends
- Answers draw directly from Acumatica data — no screen navigation, no GI queries required
- Every Acumatica user becomes a power user from day one
- "What are my top 10 SKUs by stockout risk?" — answered in seconds

Level 2: Automation Engine - Set once, run continuously

- Automated daily AI Briefings surface the most important signals from your Acumatica data every morning
- Story Boards auto-generate supply chain narratives — inventory health, demand patterns, supplier risks
- Scheduled reports and AI digests distributed to the right people automatically
- Threshold-based alerts fire when Acumatica metrics cross defined limits — no manual monitoring required

Level 3: Co-Pilot - AI working alongside your planners

- AI Insights surface anomalies, patterns, and recommendations on top of Acumatica data
- Data Explorer: drag-and-drop self-service analytics — build any report on Acumatica data without technical help
- Scenario modeling and what-if analysis for demand, supply, and procurement decisions
- AI Workbench for custom model building and advanced analytics on your Acumatica data set

Level 4: AI Workforce / Employee - Autonomous agents operating on your behalf

- Specialized AI agents run continuously — monitoring Acumatica data, identifying issues, taking action
- Each agent has defined responsibilities, guardrails, and approval workflows
- Actions include ERP updates, supplier outreach, stakeholder alerts, and executive briefings

 Every action is logged, explainable, and reversible — controlled autonomy at enterprise scale

4. Your AI Workforce — Six Specialist Agents

When ConverSight connects to Acumatica, it deploys a team of AI specialists — each one monitoring a specific domain of your supply chain, surfacing insights, and taking action within defined guardrails. These agents run continuously, powered entirely by your Acumatica data.

Demand Planner Level 3 - Co-Pilot Forecasts demand using Acumatica sales history, monitors actuals vs forecast, and surfaces deviation alerts before they impact supply.	Supply Planner Level 3 - Co-Pilot Analyzes Acumatica inventory and open POs against demand signals, flags coverage risks, and recommends replenishment actions.	S&OP Coordinator Level 3 - Co-Pilot Consolidates demand, supply, and capacity data from Acumatica into S&OP-ready briefings and scenario analyses for leadership.
Procurement Agent Level 3 - Co-Pilot Reviews Acumatica purchase requisitions and open orders, recommends PO actions, and surfaces supplier performance patterns.	Inventory Optimizer Level 2 - Automation Monitors Acumatica inventory levels against defined thresholds, runs weekly auto-analysis, and alerts teams to excess or shortage risk.	Supply Assurance Agent Level 4 - Employee Operates autonomously - monitoring supply coverage, initiating supplier outreach within approved parameters, and updating Acumatica records with outcomes.

All six agents are visible, auditable, and controllable. Every action taken on your Acumatica data is logged, explainable, and reversible. Acumatica remains the system of record at all times.

5. Platform Capabilities In Depth

Athena - Conversational AI for Every Acumatica User

Athena is ConverSight's AI assistant, purpose-built for supply chain and business operations. It connects directly to your Acumatica data and answers questions in plain language — no technical expertise required, no GI navigation needed. Athena is available to every user in your organization from day one.

- 🟢 **Ask about inventory:** "Which SKUs are at stockout risk this week?"
- 🟢 **Ask about supply:** "Which open POs are delayed and by how many days?"
- 🟢 **Ask about demand:** "How does this month's order intake compare to last quarter?"
- 🟢 **Ask about suppliers:** "Which vendors have the highest on-time delivery rate?"
- 🟢 **Ask about financials:** "What is our gross margin trend across product categories?"

AI Briefings - Intelligence Delivered Every Morning

ConverSight generates an AI Briefing every day, drawing on your latest Acumatica data. It surfaces the most important signals across your supply chain — inventory risks, demand anomalies, supplier issues, pending approvals — so your team starts each day knowing exactly what needs attention.

- 🟢 Delivered automatically — no manual report generation
- 🟢 Personalized by role — supply chain leaders, operations managers, and executives each see what matters to them
- 🟢 Proactive, not reactive — identifies issues before they escalate
- 🟢 Powered by Acumatica data, refreshed daily

Story Boards - Auto-Generated Supply Chain Narratives

Story Boards transform Acumatica data into structured visual narratives — telling the story of your supply chain performance with charts, highlights, and AI-written commentary. They can be scheduled for distribution to any stakeholder group, eliminating the manual effort of preparing recurring reports.

- 🟢 Inventory health, demand performance, supplier scorecard, S&OP summary
- 🟢 Auto-generated from Acumatica data — no manual slide-building
- 🟢 Scheduled delivery to leadership, operations, and procurement teams
- 🟢 Fully customizable to your business metrics and Acumatica data model

Data Explorer - Self-Service Analytics on Acumatica Data

The Data Explorer gives every Acumatica user the ability to build their own reports and analyses through a drag-and-drop interface. Powered by your Acumatica data, Explorer makes report building accessible to business users — from supply chain analysts to operations leaders — without writing queries or waiting for technical support

- 🟢 Drag-and-drop report builder on top of Acumatica data
- 🟢 Filter, group, pivot, and visualize any combination of Acumatica fields
- 🟢 Save and share reports across teams
- 🟢 Export to Excel, PDF, or schedule automated delivery

Security & Governance - Enterprise-Grade Controls

ConverSight is built for enterprise security and compliance. Every AI action taken on Acumatica data is governed by configurable controls — including approval workflows, role-based access, and a complete audit trail. Acumatica remains the authoritative system of record at all times.

- 🟢 Role-based access control aligned to Acumatica user roles
- 🟢 Full audit trail of every AI action — what was decided, why, and what happened
- 🟢 Approval workflows for autonomous actions — humans authorize, Athena executes
- 🟢 SOC 2 Type II certified · ISO 27001 · AES-256 encryption · TLS 1.3
- 🟢 Data stays within your governed cloud environment — Acumatica remains the system of record

6. Built For Acumatica's Core Industries

ConverSight is designed for the industries where Acumatica thrives — manufacturing, distribution, retail, and wholesale. These are environments with high data volumes, complex workflows, and supply chains where speed of decision-making directly impacts profitability.

Category	Acumatica + ConverSight
Manufacturing	Demand forecasting across production lines · Supplier lead time monitoring · Material coverage risk alerts · S&OP cycle acceleration · Production schedule optimization
Distribution	Inventory coverage by warehouse and SKU · Replenishment automation · Supplier performance tracking · Order fulfillment analytics · Stockout risk prevention
Retail & E-Commerce	Cart recovery opportunity signals · SKU-level sell-through analysis · Seasonal demand forecasting · Supplier reliability scoring · Inventory turnover optimization
Wholesale	Customer demand pattern analysis · Purchasing cycle optimization · Vendor scorecard automation · Revenue anomaly detection · Margin trend analysis by category

7. Implementation — Live In Days, Not Months

ConverSight connects to Acumatica through a pre-built, certified integration. There is no custom ETL, no infrastructure setup, and no Acumatica customization required. Your team can be interacting with AI insights from their Acumatica data within days of kickoff.

Timeline	Milestone	What happens
Day 1–2	Acumatica Connection	Certified Acumatica connector activated — your data is live in ConverSight. No customization required.
Day 2–3	Data Configuration	Supply chain data model configured to your Acumatica entities, modules, and business rules.
Day 3–5	AI Agents Activated	All six AI Workforce agents activated on your Acumatica data. First AI Briefing delivered.

Timeline	Milestone	What happens
Week 1–2	Acumatica Connection	Certified Acumatica connector activated — your data is live in ConverSight. No customization required.
Week 2+	Data Configuration	Supply chain data model configured to your Acumatica entities, modules, and business rules.

8. Why Conversight For Acumatica

Built for Acumatica Certified Acumatica Technology Partner with a pre-built connector. No customization, no ETL. Live in days.	Six AI Specialists A full AI Workforce — Demand Planner, Supply Planner, S&OP Coordinator, Procurement Agent, Inventory Optimizer, Supply Assurance Agent.	Four Levels of AI Start with conversational answers. Add automation. Activate autonomous agents. Expand at your own pace.
---	---	--

Demand Planner Level 3 - Co-Pilot Forecasts demand using Acumatica sales history, monitors actuals vs forecast, and surfaces deviation alerts before they impact supply.	Supply Planner Level 3 - Co-Pilot Analyzes Acumatica inventory and open POs against demand signals, flags coverage risks, and recommends replenishment actions.	S&OP Coordinator Level 3 - Co-Pilot Consolidates demand, supply, and capacity data from Acumatica into S&OP-ready briefings and scenario analyses for leadership.
---	--	--

9. The Next Step For Your Acumatica Investment

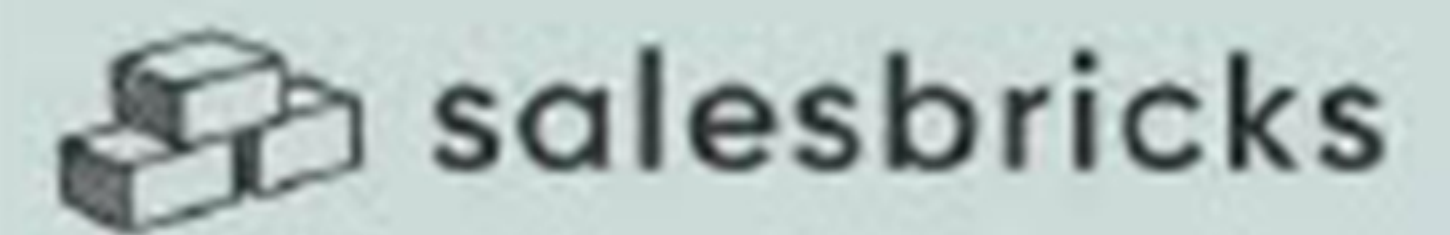
Acumatica gives your business a powerful operational foundation. ConverSight gives that foundation a brain.

With ConverSight, every Acumatica user has a conversational AI assistant available on demand. Every morning begins with an AI Briefing that surfaces what matters. A team of six specialized AI agents monitors your supply chain continuously — and with the right guardrails in place, they don't just surface issues. They resolve them.

Acumatica customers who add ConverSight don't change how they use Acumatica. They amplify it. The same data they have always captured starts making decisions on their behalf.

Ready to see your Acumatica data work harder? Book a personalized demo at www.conversight.ai — or find ConverSight in the Acumatica Marketplace today.

Join our customers who have accelerated growth with ConverSight



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.

