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Top 10 Frequently Asked Questions

QuickBooks to Acumatica Migration



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As your business grows, you may find that QuickBooks no longer meets your operational needs. This FAQ addresses the top ten most common questions about migrating from QuickBooks to Acumatica Cloud ERP, helping you understand when it's time to upgrade, what to expect during the transition, and how to ensure a smooth and successful implementation.

1. What are the signs that my business has outgrown QuickBooks?
2. How can staying on QuickBooks too long impede my company's growth?
3. How does an ERP improve operations and support growth?
4. How do ERP solutions like Acumatica compare to QuickBooks?
5. What are the key features and capabilities to evaluate when choosing an ERP?
6. What makes Acumatica the right choice for small and mid-sized businesses?
7. How can my company prepare to move from QuickBooks to Acumatica?
8. How can I make sure upgrading to an ERP doesn't distract my team or disrupt my business?
9. What role does an implementation partner/VAR play in ensuring a smooth, successful, and pain-free transition?
10. Why choose NexTec as your ERP implementation partner?



1. What are the signs that my business has outgrown QuickBooks?

There are a several clear indicators that it's time to move beyond QuickBooks:

Disconnected Systems and Data Silos

If you're managing QuickBooks alongside multiple third-party applications for CRM, inventory management, project management, or other functions, you're likely experiencing data silos. When your team must manually transfer data between systems or struggle to get a unified view of your business, it's a sign you need an integrated solution.

Multi-Entity Complexity

When your business expands from a single entity to multiple entities, QuickBooks becomes inadequate. It cannot track each business separately or provide consolidated reporting across your entire organization, forcing you to manage multiple QuickBooks instances or manually consolidate data.

Limited Inventory Management

If you need to switch inventory valuation methods (such as from average cost to FIFO), track items by expiration date, support item class hierarchies, or receive inventory replenishment suggestions, QuickBooks' capabilities fall short. These limitations become critical as your inventory grows in volume and complexity.

Restricted User Access and Collaboration

QuickBooks restricts user licensing to a set number of concurrent users. As your team grows, this limitation becomes costly and impedes collaboration. If you find yourself rationing access or paying excessive per-user fees, you've outgrown QuickBooks' licensing model.



Integration Challenges

When integrating QuickBooks with external applications requires expensive third-party services or forces you to re-enter data manually across systems, you're wasting valuable time and increasing the risk of errors.

Inadequate Reporting and Analytics

If QuickBooks' basic reporting doesn't provide the insights you need, and you're spending hours exporting data to Excel to create custom reports or dashboards, you need more robust business intelligence capabilities.

“Managing inventory was our biggest pain point in QuickBooks. In addition, the size of our QuickBooks database became unwieldy, performance slowed, and we started seeing data corruption and frequent crashes. It was time to move to a real ERP.”

Cheryl Beslow, Accounting Manager, Fulcrum Coffee

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Compliance and Audit Requirements

Investors and stakeholders often require advanced audit capabilities to identify financial irregularities. QuickBooks lacks the comprehensive audit trail and financial controls that growing businesses need.

Manual Processes and Workarounds

When your team spends significant time on manual, paper-based processes or creating workarounds to compensate for QuickBooks' limitations, you're draining resources that could be better spent growing your business.

2. How can staying on QuickBooks too long impede my company's growth?

Continuing to rely on QuickBooks when your business needs have surpassed the software's basic capabilities creates several growth-limiting challenges for companies:

Resource Drain

Disconnected systems and time-consuming workarounds drain valuable resources. Your team spends hours on manual data entry, reconciliation between systems, and creating reports instead of focusing on strategic initiatives that drive growth.

Errors and Miscommunication

Manual, paper-based processes and siloed departments lead to errors and miscommunication. When different teams work with different versions of data, they work at cross purposes, resulting in poor decision-making and lost opportunities.

Costly and Labor-Intensive Updates

Performing manual updates of QuickBooks software is expensive and labor-intensive. Many businesses fall further behind the latest version, missing critical features and security updates, which increases vulnerability and compliance risks.

Security Vulnerabilities

Cybersecurity threats are becoming more frequent, targeted, and complex. According to industry research, 43% of cyber attacks target small businesses, but only 14% are prepared to defend themselves. As a stand-alone solution, QuickBooks places security responsibility on your internal IT department rather than leveraging enterprise-grade cloud security.

Limited Scalability

QuickBooks cannot grow with your business. As you add locations, expand product lines, or enter new markets, the system's limitations become increasingly problematic. This forces you to invest in multiple third-party applications, creating even more complexity and integration challenges.

Competitive Disadvantage

Companies operating on modern, integrated ERP systems like Acumatica respond faster to market changes, serve customers more effectively, and operate more efficiently. By staying on QuickBooks, you're putting yourself at a competitive disadvantage against businesses leveraging comprehensive cloud ERP solutions.

Data Accessibility Issues

QuickBooks uses a proprietary database with no true export function. This makes it difficult to access your own data for analysis or migration. QuickBooks Online only provides read-only access to your data for 12 months after cancellation, potentially putting your historical business data at risk.

“Sticky notes, Excel spreadsheets, documents, and a little bit of magic helped us to manage our inventory prior to an ERP system. We didn't have visibility because QuickBooks was external.”

**Roni Hazelton, Senior Vice President of Fulfillment
Cherry Republic**

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3. How does an ERP improve operations and support growth?

A comprehensive ERP solution like Acumatica transforms business operations in several key ways:

Single Source of Truth

An ERP integrates all business functions—financial management, CRM, inventory, manufacturing, project management, and more—into one unified system. This eliminates data silos and ensures everyone works from the same accurate, real-time information.

Process Automation

ERP solutions automate workflows across departments, from purchase order approvals to invoice processing to project billing. This automation reduces manual work, minimizes errors, and allows your team to focus on value-added activities. Companies migrating from QuickBooks to Acumatica report efficiency gains of 50% or more in key processes.

Real-Time Visibility and Reporting

Instead of waiting for month-end closures or manually compiling reports, ERP provides real-time dashboards and analytics. Management can monitor business performance instantly, identify trends, and make data-driven decisions proactively rather than reactively.

Scalability and Flexibility

Modern cloud ERP solutions scale with your business. Whether you're adding users,

locations, entities, or expanding into new markets, the system adapts without requiring separate instances or complex workarounds. This flexibility supports growth without forcing another system change.

Industry-Specific Functionality

Leading ERP solutions offer editions tailored to specific industries—construction, manufacturing, distribution, professional services, and more. These built-in capabilities address unique industry needs without requiring costly customization or third-party integrations.

Enhanced Customer Service

With integrated CRM and real-time operational data, your entire team has a 360-degree view of each customer. This enables more personalized service, faster response times, and better customer experiences that drive loyalty and growth.

Mobile Access and Remote Work

Cloud ERP provides anytime, anywhere access via mobile devices, enabling remote work and field operations. Teams can access critical information from any location.

Improved Financial Controls

ERP solutions provide comprehensive audit trails, role-based access controls, and automated compliance reporting. These capabilities reduce risk, satisfy auditor requirements, and provide the financial controls investors expect.

Multi-Entity and Intercompany Management

For businesses operating multiple entities, ERP centralizes management while maintaining separate books for each entity. Intercompany transactions are automated, and consolidated reporting is available with just a few clicks.

Open Platform and Integration

Modern ERP solutions like Acumatica provide open APIs and built-in integrations with hundreds of third-party applications. This allows you to build a technology ecosystem that meets your specific needs without vendor lock-in.

4. How do ERP solutions like Acumatica compare to QuickBooks?

The differences between QuickBooks and a comprehensive ERP solution like Acumatica are significant:

Advanced Accounting Capabilities

While QuickBooks offers basic accounts payable, accounts receivable, and general ledger functionality, Acumatica provides AP automation, AR automation with real-time self-service portals, full audit trail accounting, comprehensive multi-currency and multi-language support, flexible costing, project accounting, fixed asset management, multi-company and intercompany accounting, and credit management.

Reporting and Business Intelligence

QuickBooks provides basic reporting with limited customization. Acumatica offers customizable role-based dashboards, real-time financial reports, consolidated reporting across multiple entities, and powerful business intelligence tools that enable detailed analysis and strategic planning.

Customer Relationship Management

QuickBooks requires external integrations for CRM functionality. Acumatica includes built-in marketing automation, sales automation, service and support case management, and self-service customer portals, providing a complete view of customer interactions.



Process Management

QuickBooks has limited custom workflows, with approvers restricted to paid users. Advanced features like email and mobile notifications are only available in QuickBooks Online Advanced. Acumatica offers user-defined workflows, custom approval workflows, and business events-triggered notifications via email, mobile, and SMS text across all editions.

Industry-Specific Functionality

QuickBooks relies on external integrations for industry-specific needs. Acumatica provides built-in editions for construction (job cost accounting, estimating, project management), manufacturing (demand planning, scheduling, shop floor control), distribution (order management with embedded WMS), professional services (project planning, resource management, time tracking), retail (native POS and eCommerce integrations), and more.

Data Ownership and Access

QuickBooks uses proprietary databases with no true export function. Acumatica ensures you own and can access your data now and always in full, usable formats with open APIs and web services integrations.

User Licensing

QuickBooks licensing costs increase as you add team members. Acumatica offers unlimited user access—you pay for computing resources used, not the number of users.

Training and Support

Some QuickBooks training is free, but most comprehensive training requires a subscription. Acumatica provides free and comprehensive online training, including Acumatica Open University with courses covering all capabilities and modules.

Platform Openness

QuickBooks is not Open API/Swagger compliant, limiting integration flexibility. Acumatica provides open APIs, making it easy to integrate with hundreds of third-party applications without expensive custom development.



5. What are the key features and capabilities to evaluate when choosing an ERP?

When evaluating ERP solutions, consider these essential capabilities:

Core Financial Management

Evaluate accounts payable automation, accounts receivable automation, general ledger functionality, cash management, fixed asset management, and multi-currency capabilities. Look for comprehensive audit trails, role-based security, and real-time financial reporting.

Industry-Specific Functionality

Ensure the ERP offers editions or modules tailored to your industry. Generic solutions require extensive customization, while industry-specific ERPs include pre-built workflows, reports, and features designed for your business model.

Scalability and Multi-Entity Support

If you operate or plan to operate multiple entities, evaluate multi-company accounting, intercompany transaction automation, and consolidated reporting capabilities. The system should scale as you add entities, users, and transaction volumes.

User Experience and Ease of Use

Evaluate the interface intuitiveness, consistency across modules, and ease of use. A user-friendly system reduces training time and increases adoption rates.

Reporting and Business Intelligence

Assess the breadth of standard reports, ability to create custom reports without IT assistance, dashboard customization options, and real-time data access.

Workflow Automation

Evaluate the ability to create custom workflows, automated approval processes, event-triggered notifications, and process automation across departments. Automation drives efficiency and reduces errors.

Customer Relationship Management

Consider whether CRM is built-in or requires integration. Integrated CRM provides a unified view of customer interactions, while bolt-on solutions create additional data silos.

Deployment Flexibility

Assess cloud (SaaS) options, on-premise options, and hybrid deployment models. The right deployment depends on your infrastructure, compliance requirements, and business model.

Vendor Support and Community

Evaluate the vendor's update frequency, support programs, training resources, user community, and partner ecosystem. A strong partner network provides implementation expertise and ongoing support.

Total Cost of Ownership

Look beyond initial licensing costs to consider implementation costs, training expenses, ongoing support fees, customization costs, and the cost of adding users or capabilities. Transparent pricing models help you predict future costs.



6. What makes Acumatica the right choice for small and mid-sized businesses?

For small and mid-sized companies considering a move from QuickBooks to a full-fledged ERP solution, Acumatica stands out for many compelling reasons:

Born in the Cloud

Unlike many ERPs that were retrofitted for cloud deployment, Acumatica was designed from the ground up as a cloud solution. This provides superior performance, automatic updates, and true mobility.

Unlimited User Access

Acumatica's pricing model charges for resources consumed, not the number of users. This eliminates the per-user fees that make other systems prohibitively expensive as your team grows.

Industry Recognition

Acumatica consistently receives awards, analyst recognition, and top user reviews as one of the best ERP software products on the market. Industry organizations, publications, and customers recognize Acumatica for usability, value, and functionality.

Comprehensive Functionality

Acumatica provides complete ERP functionality out of the box—financial management, CRM, project accounting, inventory management, order



management, and more—all working together seamlessly as a single unified solution.

Industry-Specific Editions

Acumatica offers specialized industry editions that include built-in workflows, reports, and features designed specifically for each industry.

User-Friendly Interface

Acumatica's intuitive application provides a consistent user interface across all modules, reducing training time.

Fast Go-Live

Acumatica provides robust point-and-click conversion tools to speed migration from legacy systems like QuickBooks. Many customers go live in a matter of weeks rather than months.

Deployment Flexibility

While Acumatica is a true cloud solution, it offers deployment flexibility with SaaS, private cloud, or hybrid options to meet different business needs and compliance requirements.

Open Architecture

Acumatica's open APIs and web services make integration easy. The Acumatica Marketplace includes hundreds of pre-built integrations.

Continuous Innovation

Acumatica releases major updates twice annually with new features and capabilities. Customers on the Always Current program receive these updates automatically.

Proven Track Record

Thousands of companies across diverse industries have successfully migrated from QuickBooks to Acumatica, achieving measurable improvements in efficiency, accuracy, and business performance.



7. How can my company prepare to move from QuickBooks to Acumatica?

Successful ERP migrations start with thorough planning and preparation:

Assess Your Current State

Document your current processes, pain points, and workarounds. Identify which QuickBooks features you use, which third-party applications you depend on, and where manual processes exist. This assessment helps your implementation partner understand your needs.

Define Your Requirements

Create a list of must-have capabilities versus nice-to-have features. Consider your business processes, reporting needs, integration requirements, and industry-specific functionality. Be specific about what success looks like for your organization.

Establish Project Goals

Define clear objectives for your ERP implementation. These might include reducing month-end close time, improving inventory accuracy, enabling remote access, consolidating systems, or supporting multi-entity operations.

Identify Your Project Team

Designate internal champions from each department—finance, operations, sales, and IT. These team members will work with the implementation partner, provide process expertise, and drive adoption within their teams.

Clean Your Data

Before migration, clean up your QuickBooks data. Archive old transactions, consolidate duplicate records, correct errors, and ensure data accuracy. Clean data migrates faster and reduces post-go-live issues.

Communicate with Your Team

Inform employees about the upcoming change early. Explain the reasons for migrating, the benefits they'll experience, and how the transition will affect their daily work. Transparent communication reduces resistance and anxiety.

Set Realistic Timelines

Work with your implementation partner to establish realistic timelines that balance speed with thoroughness. Rushing implementation increases risk, while drawn-out projects lose momentum.

Prepare for Change Management

Recognize that ERP implementation requires process changes, not just software installation. Be open to reimagining workflows and adopting best practices rather than simply replicating older processes.

“Acumatica hits that sweet spot between broad functionality and ease of use. It provides for everything we need, gives us room to grow and diversify, and is simple to learn and intuitive to use.”

**Chad Robertson, Vice President
Harland M. Braun & Co. Inc.**

[Learn More](#)

8. How can I make sure upgrading to an ERP doesn't distract my team and disrupt my business?

There are several strategies to minimize disruption during an ERP implementation:

Choose an Experienced Implementation Partner

Work with a certified Acumatica implementation partner who has completed numerous QuickBooks migrations. Their experience helps anticipate and avoid common pitfalls.

Follow Proven Methodologies

Reputable implementation partners use field-proven methodologies that have been refined through hundreds of implementations. These structured approaches reduce risk and ensure critical steps aren't missed.

Start with Discovery and Design

Invest time in the discovery and design phases. Understanding your current processes and thoughtfully designing your future state prevents costly mid-project changes.

Implement in Phases

Consider a phased approach that activates Acumatica modules or entities progressively. This minimizes disruption and allows teams to adjust gradually rather than changing everything all at once.

Conduct Thorough Testing

Test all workflows, integrations, and reports extensively before go-live. Include end users in testing to identify issues and ensure the system meets their needs.

Provide Comprehensive Training

Ensure every user receives role-based training before go-live. Well-trained users experience fewer issues and become productive faster. Your implementation partner can conduct training either remotely or on-site.

Plan Go-Live Timing Strategically

Schedule go-live during slower business periods if possible. Many companies choose weekends or fiscal year-end to minimize operational impact.

Establish Clear Communication Channels

Create channels for users to report issues and ask questions during and after go-live. Quick responses to problems prevent small issues from becoming major disruptions.

Plan for Post-Go-Live Support

Ensure your implementation partner provides customer care and support immediately after go-live. This intensive support period addresses issues quickly and keeps the project on track.

Document Processes and Procedures

Create clear documentation of new processes, workflows, and system usage. This helps users adapt and serves as a reference for future team members.

9. What role does an implementation partner/VAR play in ensuring a smooth, successful, and pain-free transition?

Acumatica relies on the expertise of partners like NexTec to sell and implement its cloud ERP solution. Certified Implementation partners like NexTec are essential to successful ERP deployments:

Product Expertise

Certified implementation partners have deep knowledge of Acumatica. They understand Acumatica's capabilities at a deep level and can help you make the most of your ERP investment.

Industry Knowledge

Experienced partners bring industry-specific expertise. They understand the unique challenges, workflows, and requirements of your industry and can apply best practices learned from similar implementations in your industry.

Process Optimization

Implementation isn't just about installing software—it's about improving how you do business. The right partners can help you reimagine processes, eliminate inefficiencies, and adopt best practices rather than simply replicating old workflows.

Project Management

Professional implementation partners provide experienced project managers who coordinate all activities, keep the project on schedule, manage risks, and ensure stakeholders stay aligned.

DAS Medical Increases Efficiency and Cuts Reporting Time by 50%

DAS Medical began operations using QuickBooks for accounting. However, as the company experienced rapid growth, it soon outgrew QuickBooks' capabilities. My moving from QuickBooks to Acumatica, the company has been able to substantially grow production volumes without increasing overhead.

[Learn More](#)

Technical Expertise

Partners handle technical aspects like data migration, integration development, customization (when necessary), and deployment configuration, allowing your team to focus on business operations.

Change Management Support

Experienced partners understand the human side of system changes. They help you communicate effectively, manage resistance, train users, and drive user adoption.

Knowledge Transfer

Partners provide role-based training customized to your business processes. They ensure users understand not just how to use Acumatica, but how to use it effectively within your specific workflows.

Data Migration

Partners use proven tools and methodologies to migrate your QuickBooks data accurately. They cleanse data during migration, map it correctly to Acumatica, and validate accuracy before go-live.

Testing and Quality Assurance

Partners develop comprehensive test plans, conduct thorough testing, and help users test workflows to identify and resolve issues before they affect operations.

Go-Live Support

During and immediately after go-live, partners provide intensive support to address issues quickly, answer questions, and ensure operations continue smoothly.

Risk Mitigation

Experienced partners anticipate potential problems, plan mitigation strategies, and respond quickly when issues arise, significantly reducing implementation risk.

Ongoing Optimization

The relationship doesn't end at go-live. Good partners provide ongoing support, optimization services, and guidance as your business evolves and needs change.

10. Why choose NexTec as your ERP partner?

NexTec Group is one of North America's largest and most experienced technology consulting firms, specializing in industry-specific solutions for mid-sized organizations. For thirty years, NexTec has been a trusted partner to businesses, delivering, implementing, and supporting the core Enterprise Resource Planning (ERP) and Business Intelligence (BI) solutions they need to scale and grow. With seasoned consultants from coast to coast, NexTec brings unique advantages to QuickBooks-to-Acumatica migrations:

Proven Track Record

NexTec has been helping companies implement ERP systems since 1994. As a gold-certified Acumatica VAR partner, we have been implementing Acumatica for over a decade. We've successfully transitioned hundreds of organizations from legacy systems including QuickBooks using a proven methodology and approach. Read our customer success stories for real-world results with Acumatica.

Industry Specialization

NexTec has deep expertise across manufacturing, distribution, construction, professional services, and other industries. Our consultants understand industry-specific challenges and bring best practices from similar implementations.

Comprehensive Services

NexTec provides end-to-end services from software selection and implementation to training, migration, customization, optimization, and ongoing support. We're your partner throughout the entire journey.

Proven Methodology

NexTec uses a proven migration methodology that has been refined through hundreds of successful implementations. To learn more, download our QuickBooks to Acumatica Migration Guide.

Strategic Partnership Approach

Successful ERP implementations don't end at go-live. We become your trusted Acumatica partner, providing ongoing support and optimization services beyond initial migration and go-live to ensure long-term success.

Clear Communication

NexTec provides clear, transparent communication about implementation timelines, costs, and expectations from day one. Regular updates keep everyone aligned throughout the implementation process.

Project Management

NexTec's expert project management allows your key stakeholders to focus on daily operations and business needs while we handle the technical aspects of implementation.

“The NexTec team brings a deep understanding of our platform and decades of industry expertise that have earned them our customers’ trust. NexTec is an important strategic partner and a great example of a VAR that consistently delivers value to businesses looking to grow their operations.”

John Case, CEO of Acumatica

Moving Forward: Your Path from QuickBooks to ERP Success

Outgrowing QuickBooks is a sign of success—it means your business has evolved beyond basic bookkeeping and accounting needs and requires a comprehensive solution that can support your continued growth.

Making the move from QuickBooks to ERP may seem daunting, but with the right partner and a field-proven migration methodology, the transition can be smooth and deliver immediate value and long-term strategic advantages.

The key is to act before QuickBooks' limitations seriously impede your growth. The longer you wait, the more complicated your workarounds become, the more time your team wastes on frustrating manual processes, and the more opportunities you miss because of delayed or incomplete information.



Connect with a NexTec expert to explore how a modern ERP can improve your business.

Let's Talk

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NexTec Group is one of North America's largest and most experienced technology consulting firms, specializing in industry-specific solutions for mid-sized organizations. For thirty years, NexTec has been a trusted partner to businesses, delivering, implementing, and supporting the core Enterprise Resource Planning (ERP) and Business Intelligence (BI) solutions they need to scale and grow. With seasoned consultants from coast to coast, and a premium portfolio of innovative business management solutions including Acumatica, we help you get the most out of your technology investments.