



Fulcrum Coffee Roasters Chooses NexTec Group and Acumatica

FULCRUM
COFFEE ROASTERS

About Fulcrum Coffee Roasters

It takes confidence to open a new coffee business in Seattle — but that's precisely what Fulcrum Coffee Roasters' founders did in 2012. The craft roaster was born from the merger of two smaller brands and quickly began expanding its reach. Today, Fulcrum Coffee provides equipment and barista training for coffee shops, runs its own cafes, bottles its own beverages and is moving into the hospitality sector.

"NexTec is highly organized, professional, and responsive. We know they're there when we need them to help us get the most out of Acumatica."

Cheryl Beslow, Accounting Manager, Fulcrum Coffee Roasters



Key Results

- › Streamlined accessibility supports hybrid work model
- › Simplified, agile financial reporting, and easy spreadsheets exports
- › Robust accounting controls support business best practices
- › Full distribution capabilities support the company on its growth trajectory

Like many young companies, Fulcrum Coffee started with an entry-level accounting application, but its expansions soon tested the [limits of QuickBooks](#). That's when Fulcrum Coffee pivoted to Acumatica, supported by NexTec Group.

Inventory operations grind to a halt

"Managing inventory was our biggest pain point in QuickBooks," recalls Cheryl Beslow, Accounting Manager for Fulcrum Coffee. "In addition to thousands of items to track, we build kits that may consist of beans, a bag, a label, and the labor to assemble it. QuickBooks couldn't handle it well."

Beslow adds, "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 application."

Fulcrum Coffee reached out to its IT support firm, who recommended they contact NexTec. "We spoke to NexTec about a couple of options and ultimately determined that Acumatica was the best fit for us, and at the best price," adds Beslow.

The many perks of the cloud

The benefits of a modern, cloud-based ERP application instantly became apparent. "A hosted application like Acumatica is much more efficient," says Beslow. "We no longer have any downtime, which is significant. Also, remote access is much quicker than when we used Remote Desktop. Many of our employees are remote or work from home a few days a week, and now they can be productive from anywhere."

NexTec led the initial implementation of [Acumatica](#), building the templates used to import open purchase and sales orders, receivables, and inventory counts. "They held weekly status meetings to keep communication flowing and the project on schedule," says Beslow. "It was a smooth transition — we were live on Acumatica in just about three months."

Fulcrum Coffee has an active eCommerce site and recently switched from WooCommerce to Shopify to take advantage of additional capabilities. "NexTec helped us integrate the two, and we were live with Shopify in just one day," Beslow says.

“Simply no longer worrying about the system regularly crashing made the switch worthwhile, but we’ve gained so much more.”

Cheryl Beslow
Accounting Manager
Fulcrum Coffee Roasters

Now, data flows seamlessly and in real-time between the site and Acumatica, improving accuracy and efficiency by automating the data synchronization.

Bean counting adds up

As the company grows, the robust accounting controls in Acumatica ensure best practices and heightened security. “It was too easy to delete an invoice or an order in QuickBooks,” Beslow adds.

One of the staff’s favorite features in Acumatica is the ability to have multiple tabs open at once — something [QuickBooks](#) didn’t support. “Right now, for example, I’m looking at our trial balance and also have the journal entry tab, AR aging tab, and various account detail views open. We can instantly switch and work on a different task without closing and opening windows,” Beslow notes.

Flexibility in financial and operational reporting is one of Beslow’s favorite aspects of Acumatica. “I like to look at our data in many different ways,” she says. “With Acumatica, it’s much simpler to export data to Excel for further analysis. Before I was cutting and pasting data, which took additional time, and I always worried I’d miss something.”

Business is buzzing

Acumatica provides Fulcrum Coffee with real-time visibility into available inventory, inventory in transit, reorders, and inventory costs. The kitting function in the software makes building out the company’s finished goods easy. As the next step, Fulcrum Coffee and NexTec will begin implementing Acumatica’s warehouse management system, including barcode scanners to streamline and automate inventory movement throughout the company’s warehouses.

Armed with purpose-built tools, Fulcrum Coffee can scale as far and wide as it chooses. “Simply no longer worrying about the system regularly crashing made the switch worthwhile, but we’ve gained so much more,” notes Beslow. “We’ve got a future-proof growth platform.”





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A successful brew

Fulcrum Coffee is already enjoying reduced IT expenses as its IT firm is no longer tasked with maintaining and updating the server that housed QuickBooks. “We expect those costs to drop further as we migrate more line-of-business applications to the cloud,” Beslow says.

With a modern, cloud-based business management solution and a [top-tier technology partner](#), Fulcrum Coffee is well-prepared for whatever is next. “NexTec is highly organized, very professional, and super responsive,” Beslow concludes. “We know they’re there when we need them to help us get the most out of Acumatica.”

To learn more about migrating from QuickBooks to Acumatica, read our [Migration FAQ](#) or [contact](#) our migration experts.





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

Let's Talk

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