Reach
Microsoft AI Solutions Partner
Because the Experience Matters

SOLUTION BRIEF
Acumatica for contractors

Project approvals and billing coordination

5
components already live

3
areas: approvals, invoices, draws

Live
in production today

THE CHALLENGE

Back office teams often still retype invoice coding into spreadsheets to match subcontractor bills against owner draws, and chase approvals that get stuck with one person. **That is time your team could spend somewhere else.**

CORE COMPONENTS

AP approval workspace	Shows bills and their lines, supports coding changes, and offers approval or rejection actions
Project approval roles	Adds project engineer and superintendent fields, so approvals can route beyond a single project manager
Approval notifications	Inquiry, business event and email definitions that flag pending approvals
Project draw references	Keeps draw numbers, requires a draw reference on subcontract AP bills, and copies the pro forma draw number to AR
Owner billing code	Adds an owner billing reference to project revenue budgets

SCOPE TODAY

Approval routing

Supports approvals assigned directly to individuals. Workgroup approvals are not yet supported, so we check each customer's routing setup before committing.

Draws and payments

Draw references link subcontractor bills to owner billing. Automatic detection of owner receipts and payment deadlines would be added work.

STATUS: READY TO DEMO AND PILOT

Already running in production for contractors on Acumatica. For a new customer we handle configuration, documentation and testing, plus a check of their routing rules against what the approval screen supports.