Acumatica

The Cloud ERP

Integrate Sales, Marketing, and Customer Service with Financials to Generate More Leads, Close More Sales, and Improve Customer Loyalty

Acumatica Customer Management delivers customer relationship management (CRM) applications for managing leads, contacts, opportunities, and customer accounts.

IMPROVE SALES, MARKETING, AND CUSTOMER SERVICE

- **Get an ERP and CRM that work together** from marketing and sales to delivery and post-sales support, customer information stays up to date and accurate. Track client interactions, complaints, purchases, and more.

- **Leverage integrated content management.** Get a consolidated view of customer records in one database. Access all quotes, invoices, and support cases with a 360-degree view of customer data. Address data flows seamlessly between business accounts and contact forms, including different address info for contacts.

- **Gain visibility.** Get up-to-date sales data to help manage forecasts, quotas, and results on real-time reports and dashboards.

- **Be proactive.** Reduce response times and improve satisfaction with service management tools. Anticipate customer problems. Identify upsell opportunities. Automate reminders for callbacks, follow-ups, and requests.

- **Increase sales and marketing efficiency.** Streamline lead management and events with sales automation and workflows. Use predefined, branded templates to create emails for automatic distribution. Leverage user-defined fields to search and filter records. Get consistent naming conventions. Create and manage events on one screen with an event side panel. Streamline sales and fulfillment by automatically linking sales orders and quotes to opportunities without manual intervention.

- **Track marketing effectiveness.** Marketing automation tools manage leads, improve conversions, measure campaign performance, communicate with contacts, and link campaigns to profitability.

- **Improve employee engagement.** With Employee Case Management, users can submit, assign, and track employee assistance requests for onboarding, technical help, and other requests not related to sales leads or opportunities.

FOSTER COLLABORATION WITH CUSTOMER PORTAL

- **Provide customer self-service.** Give customers access to data on their interactions and enable customer activities online so they can track orders, manage support cases, check balances due and payments received.

- **Share information.** Provide customers with 24/7 access to key content, including marketing and educational materials, user guides, and FAQs.

- **Foster true team collaboration.** Unlimited server pricing allows you to include everybody in automated and integrated workflows to promote a team approach to customer management.

KEY BENEFITS

GAIN A 360-DEGREE VIEW

- Form a complete view of your business and all customer interactions
- Identify customers by profitability fast

EMPOWER STAFF AND CUSTOMERS

- Give customers access to data through the secure Customer Portal
- Share information with staff and create automated alerts across departments

ENHANCE CUSTOMER SERVICE

- Respond rapidly to customer requests from first contact through post-sales
- Improve customer service with immediate access to customer history when filling sales orders, even those created outside of Acumatica CRM

OPTIMIZE CONTACT MANAGEMENT

- Get one-click access to contacts with CRM add-in for MS Outlook
- Create leads and contacts from your inbox. Log activity and attach email contents to CRM
- Create opportunities and cases associated with existing contacts
- Import and edit leads, contacts, and cases in bulk from Excel

CUSTOMER MANAGEMENT FEATURES AND CAPABILITIES

Reporting and Dashboards	Accelerate decision-making with reporting tools that deliver customized views of your business overall and focused views of departments and functions.
Sales Automation	Get a full view of opportunities and contacts. Gain efficiency with a workflow-assisted lead assignment and sales management. Automatically link sales orders to quotes and opportunities.
Business Intelligence	Deliver a 360-degree view of customer activities and information with drill-down capabilities, so everyone in your organization can better serve the customer.
Integrated Marketing	Manage leads, improve conversions, measure campaigns, communicate with contacts, and more. Capture leads from web forms, lists, and events. Send branded emails. Track the best channels for qualified leads.
Service and Support Automation	Reduce response times and support costs, Create a case from captured web forms or manual entry. Assign and escalate cases per policies. Ensure accurate billing with integrated financials. Extend case management to employees for service requests.
Customer Self-Service Portal	Furnish 24/7 customer access to account information, support cases, and the latest updates through the online self-service portal.
Integrated Document Management	Manage a central repository of customer collateral, email templates, price lists, contract templates, pictures, videos, and other documents.
Integrated Financials	Link campaign response rates and sales performance to profitability. Automatically integrate CRM with billing and finances. Support multiple base currencies in one tenant.
Lead Management	Assign leads to sales or partners according to customized criteria and data. Automatically generate lists based on user-defined criteria, like purchase history, to support custom campaigns.
Account and Contact Management	Use AI with machine learning to capture business card contacts via mobile image recognition. Convert leads into accounts. Link contacts to activities, tasks, opportunities, cases, and documents.
Email Management	Create emails with predefined, branded templates for rapid distribution. Automatically attach incoming and outgoing emails to CRM activities.
Data Management	Configure duplicate check rules for contacts and leads. Leverage Google and Bing address services to look up company and contact addresses.
Quick Access to Important Activities	Pin activities for quick access and tracking. Use configurable side panels to automatically display related data for accounts, contacts, opportunities, orders, and support cases without navigating away.

ABOUT ACUMATICA

Acumatica Cloud ERP provides the best business management solution for digitally resilient companies. Built for mobile and telework scenarios and easily integrated with the collaboration tools of your choice, Acumatica delivers flexibility, efficiency, and continuity of operations to growing small and midmarket organizations. **Business Resilience. Delivered**.

Contact us today to get started: 888-228-8300 | acumatica.com