

Gmail INTEGRATION

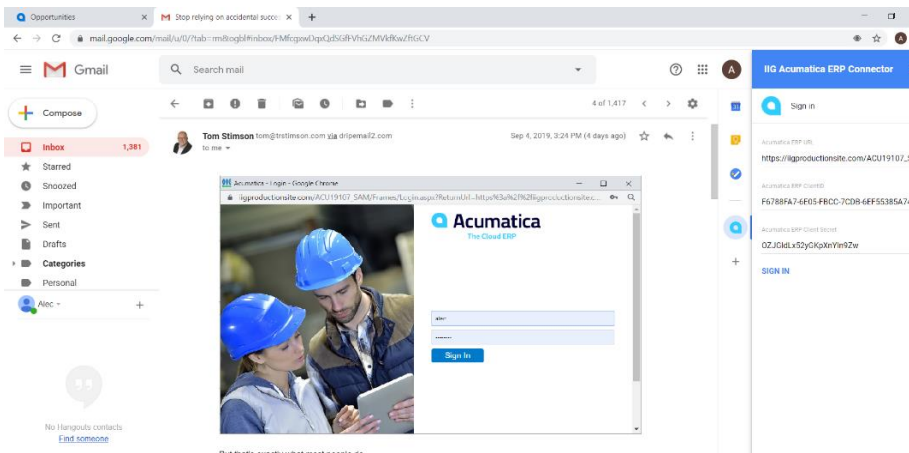
The Gmail Integration Enhancement provides the ability to link emails processed using Gmail with Acumatica. Access to Acumatica is provided based on the Acumatica ERP URL and Login credentials entered.

CONTACT, CASE AND OPPORTUNITY SETUP

- **Leads and Contacts Search.** For any email in Gmail mailbox, Gmail Integration will search for a lead or contact in Acumatica ERP that matches the sender's email for the incoming email or recipient's email for the outgoing email.
- **Case or Opportunity Creation.** For matching contact or lead record, information is displayed from Acumatica allowing the user to create a Case or Opportunity record and log the activity to be accessible on the Activities Tab of the Contact or Lead record in Acumatica.
- **Required Data Inputs.** Entry for required data fields are identified and user inputs are needed prior to saving the records.

LOGGING OF COMMUNICATION ACTIVITIES

- **Activity Logging.** Activity associated with the activity is stored for the entity identified.



KEY BENEFITS

STREAMLINE CRM FUNCTIONS FOR EMAILS PROCESSED USING GMAIL

- Display CONTACT and LEAD information stored in Acumatica
- Creation of a LEAD in Acumatica
- Creation of a CONTACT in Acumatica
- Creation of a CASE in Acumatica
- Creation of an OPPORTUNITY in Acumatica
- Log email ACTIVITY in Acumatica

EMAIL INTEGRATION FEATURES AND CAPABILITIES

Search for lead or contact records in Acumatica

Display contact or lead information allowing users to access the contact or lead record.

Create Case or Opportunity record

Create a Case or Opportunity for the existing contact or lead in Acumatica or the created lead or contact record.

Log Gmail Activity in Acumatica

Email activity is created for both incoming and outgoing emails in Acumatica.

Secure Access to Acumatica

Gmail Integration requires setting up HTTPS Service. Access to Acumatica ERP is allowed by entering valid username and password.

THE ACUMATICA ERP DIFFERENCE

Acumatica delivers a full suite of integrated business management applications unlike any other ERP solution today.

STREAMLINE OPERATIONS

Manage your business more efficiently:

- Automate processes
- Control workflows
- Access the system from anywhere on any device – including mobile
- Promote collaboration with all-inclusive user licensing

ADAPTABLE SOLUTION

Add and extend:

- Deploy in-house or in a private or public cloud
- Easily configure your solution to fit your needs
- Add capabilities such as CRM or data visualization at any time
- Extend to other solutions and applications beyond ERP

YOUR BUSINESS ACCELERATED

- Accelerate business performance and make smarter decisions with automated processes, real-time data collection, financial analyses, and forecasting
- No per user pricing – system scales as your business grows