Acumatica
The Cloud ERP

Fuel Productivity and Collaboration with Microsoft Teams Integration

Acumatica's Microsoft Teams Integration makes the world's leading collaboration software, Microsoft Teams, accessible from inside Acumatica. Now users can chat, call, share files, and meet with internal and external contacts without leaving Acumatica's interface. The native integration connects Acumatica business events and records to Microsoft Teams chats, channels, and meeting files. Chat, talk, and share real-time information with internal colleagues and external partners. Ask and answer questions on the fly. Submit and approve requests. Keep groups and individuals up to date with the latest information, all without leaving Acumatica.

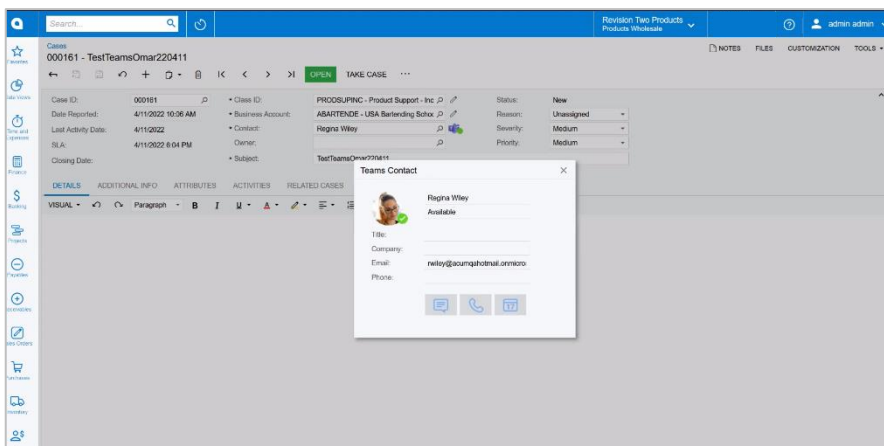## STREAMLINE TASKS WITH SEAMLESS INTEGRATION

Get work done faster and easier with Acumatica's native Microsoft Teams integration.

- Access Microsoft Teams features from buttons within Acumatica.
- Select the contact or channel you want to interact with directly from Acumatica Leads, Contacts, Case, and Business Event screens.
- Share time-sensitive documents, like invoices, with a contact or a group with a few clicks of the mouse.
- Streamline workflows, approvals, and more while automatically creating a clear audit trail for each activity.
- Automatically alert specific contacts when events occur via trigger notifications sent from Acumatica business events to the appropriate MS Teams channel and contacts.

IMPROVE EMPLOYEE AND PARTNER COMMUNICATION

Empower employees and partners to resolve issues and complete tasks rapidly.

- Identify the real-time status information of each contact on the top of the Acumatica screen.
- Choose your preferred contact method, including chat, audio call, and meeting invite.
- Put priority documents in front of the appropriate contact or group by uploading files to Teams in real-time.
- Verify that contacts received messages and documents immediately.
- Monitor activity and responses to crucial tasks and communications.

KEY BENEFITS

GAIN EFFICIENCY

- Enable employees to get their questions answered as soon as they arise by contacting the right Teams contact from their Acumatica interface
- Notify users of critical status and events with automated alerts
- Get essential documents, like payment data, to the right people in real-time by attaching them to a Teams message
- Import files from Teams directly into the relevant Acumatica record

FUEL REAL-TIME COLLABORATION

- Enable users to reach colleagues via chat or call or set up a meeting fast
- Allow users to choose their preferred communication method
- Freely share documents and links to corresponding Acumatica records

ENHANCE TRANSPARENCY

- Provide at-a-glance access to the availability of specific contacts
- Present audit trails of messages and attachments for individuals and groups
- Enable real-time communication with all relevant colleagues and partners through group messages

Access Microsoft Teams and contacts directly from Acumatica Cloud ERP.

FEATURES AND CAPABILITIES

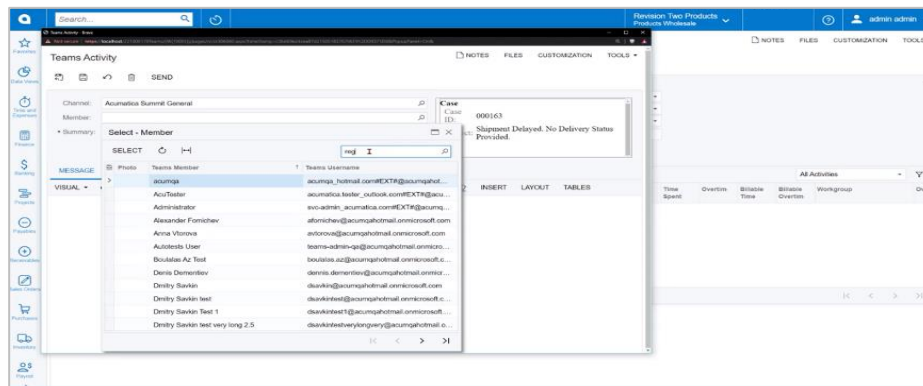|	
Intuitive, Bi-Synchronous Collaboration	Start a Teams message or call to colleagues and external partners from Acumatica's Cases, Business Events, Contacts, Leads, and Opportunity Screens by selecting the contact's name and clicking on the Teams chat, message, or meeting icon.
Communication Audit Trails	Access and maintain full audit trails of each message, chat, and meeting.
Automated Alerts	Automatically alert designated contacts or groups in Teams when specific business events occur in Acumatica, such as a payment, approval request, promising lead, or change in ownership of a case.
Record Sharing	Share an Acumatica record with select contacts or Teams groups by adding a link to a Teams message and automatically notifying recipients.
Document Import	Upload documents directly from Teams by opening the files in a message, meeting, or group. Select the Teams button in Acumatica to find and import the file.
Activity Creation	Create an activity to share important information, such as a customer request, with specific groups or channels and automatically post it to Teams and notify members.
Contact Management	Maintain Teams contacts' names, profile pictures, and contact information for internal colleagues and external partners in the Acumatica interface.
At-a-Glance Status Information	View real-time availability of all internal contacts within Acumatica by clicking on each person's name from the contacts list.

Collaborate with internal employees and external customers, vendors, and partners via Microsoft Teams directly from Acumatica.

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