

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

Acumatica Customer Management includes 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 account 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. Predefined, brand-consistent templates create emails for contacts, employees, and leads for automatic distribution. Leverage user-defined fields to create custom fields to search, find, and filter records. Get consistent naming conventions. Create and manage events on one screen with event side panel. Eliminate redundant records automatically.
- **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 with integrated financials, marketing, sales, and service information
- See all customer interactions with your company
- Identify which customers are profitable and which are not

##### EMPOWER STAFF AND CUSTOMERS

- Give customers access to the information they need through secure Customer Portal
- Share information with staff to build unified sales and service
- Create automated notifications across departments

##### ENHANCE CUSTOMER SERVICE

- Respond rapidly to customer requests at every point from first contact, sales and fulfillment, and billing to post-sales.

##### 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

<b>Reporting and Dashboards</b>	Accelerate decision-making with reporting tools that deliver customized views of your business overall and focused views of departments and functions.
<b>Sales Automation</b>	Provide a complete view of opportunities and contacts that may influence the sales decision. Improve efficiency with a workflow-assisted lead assignment and sales management process.
<b>Business Intelligence</b>	Deliver a 360-degree view of customer activities and information with drill-down capabilities, so everyone in your organization can better serve the customer.
<b>Integrated Marketing</b>	Manage leads, improve conversions, measure campaigns, communicate with contacts, and boost productivity. Marketing can capture leads from web forms, purchased lists, events, and other sources, send branded email offers, and track the best channels for qualified leads.
<b>Service and Support Automation</b>	Reduce response times and support costs, Create a case from captured web form inquiries or manual entry. Assign cases and escalate per policies. Ensure accurate billing through financial module integration. Extend case management to employees to manage service requests.
<b>Customer Self-Service Portal</b>	Furnish 24/7 customer access to account information, support cases, and the latest updates through the online self-service portal.
<b>Integrated Document Management</b>	Manage a central repository of customer collateral, email templates, price lists, contract templates, pictures, videos, and other documents.
<b>Integrated Financials</b>	Link campaign response rates and sales performance to profitability. Automatically integrate CRM with billing and financial data. Support multiple base currencies in one tenant.
<b>Lead Management</b>	Assign leads to sales or partners according to customized criteria and data.
<b>Account and Contact Management</b>	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.
<b>Email Management</b>	Create emails for contacts, employees, and leads with predefined, brand-consistent templates and send features for rapid distribution. Automatically attach incoming and outgoing emails to CRM tasks and activities. Track and measure email marketing effectiveness with native SendGrid integration.
<b>Data Management</b>	Configure duplicate check rules for contacts and leads. Leverage Google and Bing address services to look up company and contact addresses.
<b>Quick Access to Important Activities</b>	Pin activities for quick access and tracking. Use configurable side panels to access related information 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.**