



## Customer Relationship Management

Acumatica delivers an embedded CRM solution, tightly connected with financials and content management, to reduce sales cycles, increase close rates, improve efficiency, and boost collaboration.

- **Unify ERP and CRM processes to empower sales and marketing with profitability insights on products, customers, and territories**
- **Get a 360-degree view of sales and marketing activities**
- **Rapidly respond to customer requests throughout the sales cycle**
- **Provide instant access to all customer history and contact data**

### Key business benefits

- Create and track campaigns with HubSpot integration.
- Share sales data with staff and create alerts across departments.
- Create leads and contacts from inboxes and get one-click access to contacts and leads with CRM add-ins for MS Outlook and Gmail.
- Create opportunities and cases associated with existing contacts.
- Import and edit leads, contacts, and cases in bulk from Excel.

### Related resources

- Acumatica CRM Fuels 90% Growth > [LEARN MORE](#)
- Maximize Growth with Unified ERP and CRM > [LEARN MORE](#)
- Schedule a Personalized Demo > [LEARN MORE](#)

## Integrate Sales and Marketing to Generate More Leads, Close More Sales

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

### OPTIMIZE SALES AND MARKETING ACTIVITIES

- **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.
- **Gain visibility.** Get up-to-date sales and marketing data on real-time reports and dashboards that help manage forecasts, quotas, and results.
- **Be proactive.** Reduce response times and improve satisfaction. Anticipate customer problems. Identify upsell opportunities. Automate reminders for callbacks, follow-ups, and requests.
- **Increase sales and marketing efficiency.** Streamline lead management and sales processes with automated, integrated workflows. Create emails for automatic distribution on pre-defined, branded templates. Prevent delays by automatically tracking activities, delegating and reassigning tasks, and sending automated alerts. Leverage user-defined fields to search and filter records. Get consistent naming conventions. Create and manage events on one screen with side panels. Streamline fulfillment by linking orders and quotes to opportunities.
- **Track marketing effectiveness.** Use marketing automation tools to manage leads, improve conversions, measure campaign performance, communicate with contacts, and link campaigns to profitability.

"We've really turned up the volume of our contact. We're projecting an 8-fold growth in the school segment of our business from when we first adopted Acumatica. Much of that growth has come from having a better CRM in place ..."

—David Salmon, Director of Information Services, ComCenter

> CUSTOMER STORIES

## Opportunity Management and Sales Automation

Get a complete view of opportunities and contacts. Gain efficiency with workflow-assisted lead assignment and sales management. Collaborate on deals, task assignments, and activities. Quickly create quotes and orders and share them with prospects. Related records are automatically linked, making it easy to find communication, invoices, and detailed information.

### Lead Management

Import, sort, and classify leads and contacts from spreadsheets. Assign leads to sales representatives or partners using customized criteria. Collect information for different lead types and custom-defined attributes to effectively target market segments. Automatically generate tailored lists using criteria such as purchase history to support custom campaigns.

### Approvals and Workflows

Use workflows to manage approvals in your sales processes. Restrict rights to specific customer accounts for security. Establish automated notifications across departments based on business activities and expedite workflows with pre-defined alerts. Track activities and delegate tasks. Automatically reassign outstanding tasks and unanswered approval requests when pre-defined conditions are not met.

### Account and Contact Management

Convert leads into business accounts and contacts linked to activities, tasks, opportunities, cases, and documents. Import and edit leads, contacts, accounts, cases, and opportunities in bulk from Excel. Create and manage customer and prospect accounts and contacts. Use artificial intelligence with machine learning to capture business card contacts using mobile image recognition.

### Email Management

Simplify the administration of Microsoft Outlook or Gmail email accounts and enhance security by managing personal email accounts. Ensure brand consistency branded templates for automatic distribution. Generate emails and automatically track email responses and attach incoming and outgoing emails to CRM activities.

### Dashboards and Reporting

Access robust opportunity summary reports filtered by varied criteria such as stage, salesperson, or estimated close date. Create announcements and default dashboards for team members. Accelerate decision-making with customized views of your overall business and detailed departmental functions.

### Task Management

Streamline task management with dedicated task windows that enable each user to view all tasks assigned to them, including task status, deadlines, and task pipeline.

### Data Management and Integrity

Preserve data integrity by removing duplicate contacts by name and/or address and using fuzzy logic to review fields with formatting discrepancies. Leverage Google and Bing address services to look up company and contact addresses.

## Lifecycle Management

Track clients through prospecting, closing, and up-selling on a single, integrated system. Maintain a complete history of communication. Get a 360-degree view of customer activities and information with drill-down capabilities so everyone in your organization can better serve customers.

### 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.

### 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. Create customized landing pages to capture leads from your website, online advertising, direct mail, or other sources.

### Campaign Target Lists

Create campaign target lists by manually adding contacts or leads to lists or uploading records from files. Dynamic lists can be automated by defining criteria such as geography or product interest for automated inclusion of records in marketing lists.

### Campaign Management

Create campaign target lists by manually adding contacts or leads to lists or uploading records from files. Track campaign costs and revenues by selected lists or other criteria from your inventory of prospects, leads, contacts, and customers. Use artificial intelligence with machine learning to capture business card contacts using mobile image recognition.

### Integrated Document Management

Attach any digital document to leads, opportunities, and accounts. Once files have been attached to one document, the file can be linked to additional documents without uploading it again. Manage a central repository of collateral, email templates, price lists, contract templates, pictures, videos, and documents.

### Partnership Marketing

Assign leads to a "parent account" within your organization or to an external partner. Email leads to a partner or allows partners to view information inside Acumatica.

### 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, and orders without navigating away.

### Centralized Communication

Automation associates emails with related sales and marketing activities and tasks.

## ABOUT ACUMATICA

Acumatica Cloud ERP is a comprehensive business management solution that was born in the cloud and built for more connected, collaborative ways of working. Designed explicitly to enable small and mid-market companies to thrive in today's digital economy, Acumatica's flexible solution, customer-friendly business practices, and industry-specific functionality help growing businesses adapt to fast-moving markets and take control of their future.

For more information, please visit [www.swktech.com/products/acumatica/](http://www.swktech.com/products/acumatica/)