Acumatica
The Cloud ERP

Customer Management

Integrate Sales, Marketing, and Customer Service with your 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 CUSTOMER SERVICE AND SATISFACTION

- **Finally, get an ERP and CRM that work together!** From marketing and sales to delivery and post-sales support, customer information is always up to date and accurate. Track customer interactions, complaints, purchases, and more.
- **Leverage integrated content management.** Acumatica Customer Management provides a consolidated view of all customer records in a single database. Access to all written quotes, invoices, and support cases gives every member of your team a 360-degree view of customer interactions and records. Address information seamlessly flows between the business account and contact forms, including different address info for contacts.
- **Gain visibility.** Dashboards and reports provide real-time sales data to help your team manage forecasts, quotas, and results.
- **Be proactive.** Service management tools reduce response times and improve customer satisfaction. Anticipate customer problems before they occur. Identify upsell opportunities. Automate reminders for callbacks, follow-ups, and requests.
- **Increase sales efficiency.** Reduce sales cycles while improving close rates. Sales automation and workflows streamline lead assignment and sales processes.
- **Track marketing effectiveness.** Acumatica's marketing automation tools help you manage leads, improve conversions, measure campaign performance, communicate with contacts, and link campaigns to profitability.

PROMOTE COLLABORATION WITH THE SECURE CUSTOMER PORTAL

- **Provide better customer self-service.** Give customers access to the information they need about all their interactions with your company and enable customer activities online. Customers can track orders, manage support cases, and check balances due and payments received.
- **Share information.** Provide customers with 24/7 access to important content, including marketing and educational materials, user guides, and FAQs.
- **Foster true team collaboration.** Unlimited server pricing allows you to involve everybody in automated workflow processes 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
- Learn which customers are profitable and which are not

EMPOWER YOUR STAFF AND CUSTOMERS

- Give customers access to the information they need through the secure Customer Portal
- Share information with staff to build an effective team approach to sales and service

ENHANCE YOUR CUSTOMER SERVICE

- Respond rapidly to customers' requests at every point in the sales cycle – including first contact, sales and fulfillment, billing, and after-sale service requests

STREAMLINE CONTACT MANAGEMENT

- Gain one-click access to existing contacts with our CRM add-in for Microsoft Outlook
- Create new leads and contacts right from your inbox
- Create opportunities and cases associated with existing contacts
- Log activity and attach e-mail contents to CRM

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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	Provide a complete view of opportunities and contacts to make your team aware of all experiences that may influence the sales decision. Improve efficiency with a workflow-assisted lead assignment and sales management process.
Business Intelligence	Deliver a 360-degree view of customer activities and information with full drill-down so everyone in your organization can better serve the customer.
Integrated Marketing	Manage leads, improve conversions, measure campaign performance, communicate with contacts, and increase productivity. Marketing teams can capture leads from web forms, purchased lists, events, and other sources, send branded email offers, and track the best channels for qualified leads.
Service and Support Automation	Reduce response times and support costs, improve customer satisfaction, and increase billing accuracy. Create a case from captured web form inquiries or manual entry. Assign cases and escalate according to your set policies. Ensure accurate billing through financial module integration.
Customer Self-Service Portal	Furnish 24/7 customer access to account information, support cases, and 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 overall profitability. Acumatica Customer Management is integrated with your billing and financial data.
Lead Management	Assign leads to sales or partners according to customized criteria and data.
Account and Contact Management	View leads that can be converted into business accounts and linked to contacts, activities, tasks, opportunities, cases, and documents.
Email Management	Use email templates to send professional emails to prospects and customers that are consistent with brand guidelines. Automatically attach incoming and outgoing emails to CRM tasks and activities.
Address Enrichment	Leverage Google and Bing address services to look up company and contact addresses.
Quick Access to Important Activities	Pin important activities for cases, opportunities, and leads, such as emails, tasks, notes, or phone calls, to the top of the activities list so users can quickly access and keep track of them.

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: 281-652-5947 | accountingbusinesssolutions.com

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