

KEY BENEFITS

MORE EASILY MANAGE YOUR CUSTOMERS

Respond rapidly to customers from the time they first enter your website, through the sales process, billing, and during customer service requests.

EMPOWER YOUR CUSTOMERS

An out-of-the-box, self-service Customer Portal allows you to give customers access to the financial and case information you choose.

ACCESSIBLE FROM ANYWHERE

Access your CRM features from anywhere using any popular web-browser.

LESS DOWNTIME DURING INSTALLATION

Acumatica installs quickly and a single server license can be accessed by everybody without installing client software.

IMPROVE PROFITABILITY

Gain a complete view of your business—integration with financials gives you reports that link marketing campaigns to account profitability.

TEAM APPROACH TO SALES AND SERVICE

CUSTOMER MANAGEMENT

Integrate sales, marketing, and customer service with your financials to close more sales and improve customer loyalty, and utilize a self-service Customer Portal to provides easy access to often-requested information

The Acumatica Customer Management Suite delivers a customer relationship management (CRM) solution which automates your sales processes so you can respond faster to customers and partners or allow them to self-serve on-demand. Workflow and security allow you customize approvals to match your sales process while managing permissions for each screen object and customer account.

CUSTOMER MANAGEMENT SUITE

Sales automation

Sales tools increase sales efficiency and close rates, while reducing sales cycles. Improved information flow gives sales teams awareness of all activities influencing their customers. Lead assignment and workflow help manage and improve the efficiency of sales processes.

Marketing automation

Marketing tools manage leads, improve conversions, measure campaign performance, communicate with contacts, and improve productivity. Reports link campaigns to profitability.

Service and support automation

Service management tools reduce response times and support costs, improve customer satisfaction, and accurately bill transactions. Assign and escalate support cases according to workflow policies. Bill cases according to client support contracts.

Analytics and forecasting

A complete set of reporting tools improve forecasting and information flow, and reduce deviation from targets. Customize reports and dashboards to provide real-time performance indicators.

CUSTOMER PORTAL

Help customers help themselves

24 hours a day, 7 days a week, your customers can access account information, create new support cases, and retrieve the latest case updates—all without picking up the phone or sending an email.

Financial overview

Give customers the ability to see all historical documents, balances, due dates, payments received and amount due within the Customer Portal. Customers can also update address, contact and user access details.

Knowledge base

Allow customers to search for answers to their questions 24/7. This also helps knowledge transfer, allowing more customer self-service and generating fewer support calls.

Document sharing

Provides a secure location to share documents with customers, such as marketing material, educational material, company policies and FAQs, without needing to build a separate web page.

ADDITIONAL CUSTOMER MANAGEMENT FEATURES AND BENEFITS

FEATURE	DESCRIPTION
CRM integration	Convert CRM opportunities to sales orders without re-entering pricing and discount information. Customer service can locate orders to verify shipping and delivery status.
Integrated document management	Manage a central repository of customer collateral, email templates, price lists, contract templates, pictures, videos, and other documents so your entire company uses the same set of current materials.
Integrated financials	Acumatica Customer Management is integrated with billing and financial data so you link campaign response rates and sale performance to overall profitability.
Lead and list management	Aggregate leads from your website, purchased lists, trade shows, events, with those manually entered by salespeople. Assign leads to sales or partners according to customized criteria and data. Capture city, state and ZIP code of leads to facilitate geographic analysis.
Account and contact management	Gain a 360-degree view of accounts with leads that can be converted into business accounts and linked to contacts, activities, tasks, opportunities, cases, and documents.
Opportunity management	Opportunities can be converted to sales orders for quick fulfillment and are linked to items in your product catalog so when deals close, finance can quickly issue an invoice. Opportunities are centrally managed so everybody can collaborate to close deals.
Case management	Cases can be viewed by all stakeholders along with the tasks, events, and activities that are linked to them. Case severities, escalation paths, priorities, and reminders help improve customer service. A support person can now self-assign a case instantaneously with the "Take Case" button, speeding up time to resolve issues and answer questions.
Contract management	Link service and support automation to customer contracts so service agents can determine the proper level of service. Service rates can be contracted per incident, per hour, or prepaid.
Online marketing	Rapidly create customized landing pages which capture leads originating from your website, a Google advertisement, a direct mail piece, or other source.
Email management	Use email templates to send professional-looking emails to prospects and customers that are consistent with brand guidelines. Automatically attach incoming and outgoing emails to various CRM features. Link outgoing emails with logged CRM activities and use the activity content that is automatically populated to the email to more easily compose your message.
Segmentation tools	Define custom attributes that are important to your business. Collect information for different lead types so you can effectively target more than one market.

UNLOCK YOUR BUSINESS POTENTIAL WITH ACUMATICA

Acumatica is a leading provider of cloud business management software that empowers small and mid-size businesses to unlock their potential and drive growth.

Built on the world's best cloud and mobile technology and a unique customer-centric licensing model, Acumatica delivers a suite of fully integrated business management applications such as Financials, Distribution, CRM and Project Accounting, powered by a robust and flexible platform.

TAKE CONTROL OF YOUR BUSINESS

Successful companies know the value of having visibility and control over their business. Acumatica enables you to drive growth, manage costs, and be productive.

PLAY TO YOUR STRENGTHS

Every business is unique. Play to your strengths by doing what works best for your company. Tailor your business management software to fit your exact needs, no matter how specific your requirements.

EMPOWER YOUR PEOPLE

Your business isn't confined to four walls. Why should the people that impact your business be? Acumatica goes wherever your people go – anytime, anywhere, and on any device.