Gmail Integration

Combine the convenience of Gmail with the power of Acumatica CRM. Access CRM directly from Gmail to instantly export contacts, leads, opportunities, and orders directly into the unified ERP and CRM solution.

- **Streamline core sales and support functions**
- **Create leads, contacts, opportunities, and cases in Gmail**
- **Open Acumatica in Gmail and export customer data**
- **Search for Acumatica customer and prospect data from Gmail**

Key business benefits

- Get one-click access to contacts. Acquire and process new leads faster.
- Create leads and opportunities from Gmail and move them to Acumatica for processing.
- Improve customer service by quickly opening and updating cases based on Gmail messages.
- Find, update, and manage contacts directly from Gmail.
- Enable employees to access Acumatica from Gmail.

Related resources

- Acumatica CRM Fuels 90% Growth > LEARN MORE
- Maximize Growth with Unified ERP and CRM > LEARN MORE
- Schedule a Personalized Demo > LEARN MORE

Streamline Sales and Support with Integrated Gmail and Acumatica

Do not let another lead fall through the cracks. With Gmail integration, you can quickly and easily manage contacts, sales leads, opportunities, and customer cases directly from your inbox.

Open Gmail and click on the Acumatica add-on on the right panel to access the unified ERP and CRM solution. You can click on an email conversation and then create contacts, leads, opportunities, and cases within Acumatica —all without leaving Gmail.

The Gmail Integration enables companies to:

- **Automatically manage emails sent through Gmail.** Process both incoming and outgoing emails in the Gmail account mailbox.

- **Track and manage contacts, leads, opportunities, cases, and customer communication.** Reduce response times and improve satisfaction with service management tools.

- **Create AP bills from Gmail.** Streamline billing with AP Document Recognition to identify bills sent to Gmail and process them in Acumatica, allowing users to review and edit.

- **Inform decisions and reduce error.** Search for a lead or contact in Acumatica unified CRM and ERP solution that matches the sender's email to get instant access to relevant customer information.

- **Increase efficiency.** Streamline lead management and events. Create cases and opportunity records from Gmail and log the activity for future access.

"We have seen over 90% growth over the past five years, and we expect to see continued growth in the years to come. Acumatica has been a huge part of our success."

–David Salmon, Director of Information Services, ComCenter

> CUSTOMER STORIES

Intuitive Contact and Lead Creation & Retrieval

Search for a lead or contact in Acumatica that matches the sender's email address for incoming messages or the recipient's email address for any outgoing message. Easily create a new contact if one doesn't exist. Associate a new sender's email address to an existing contact.

Communication Logs

Log incoming and outgoing Gmail messages in Acumatica.

Contact Management

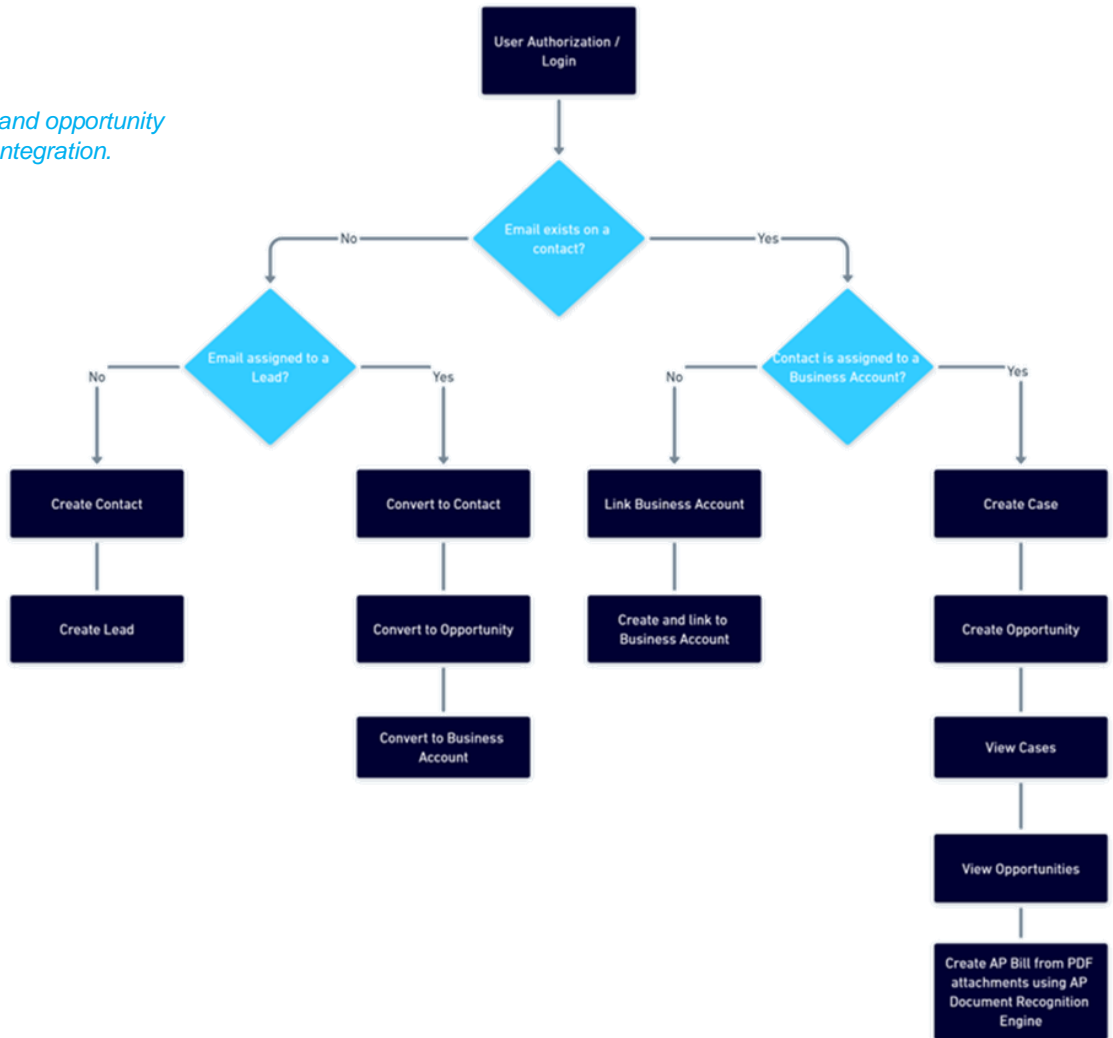Maintain contact names, email addresses, and contact communication history.

AP Bill Recognition

Initiate the creation of AP bills from Gmail. Identify bills in PDF format sent to Gmail; automatically recognize bill line details and parse them for processing. Navigate to Acumatica to review, edit, and create the AP bill.

Opportunity and Case Creation

Create sales opportunities and customer support cases from the Gmail message. Click on the Acumatica panel and open an opportunity or case activity.

Streamline contact, lead, and opportunity management with Gmail Integration.

Flowchart:
- User Authorization / Login
  - Email exists on a contact?
    - No → Email assigned to a Lead?
      - No → Create Contact → Create Lead
      - Yes → Convert to Contact → Convert to Opportunity → Convert to Business Account
    - Yes → Contact is assigned to a Business Account?
      - No → Link Business Account → Create and link to Business Account
      - Yes → Create Case → Create Opportunity → View Cases → View Opportunities → Create AP Bill from PDF attachments using AP Document Recognition Engine

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