

Collect Payments Faster and Improve Customer Satisfaction

The Acumatica Payment Portal puts payment control at your customers' fingertips. Customers can submit payments, customize the amount, and take advantage of cash discounts instantaneously without leaving the Self-Service Portal. Now they can access their accounts, place orders, and submit payments from the same application. Automated email templates confirm receipts and foster open communication.

STREAMLINE PAYMENT PROCESSES AND RESPONSES

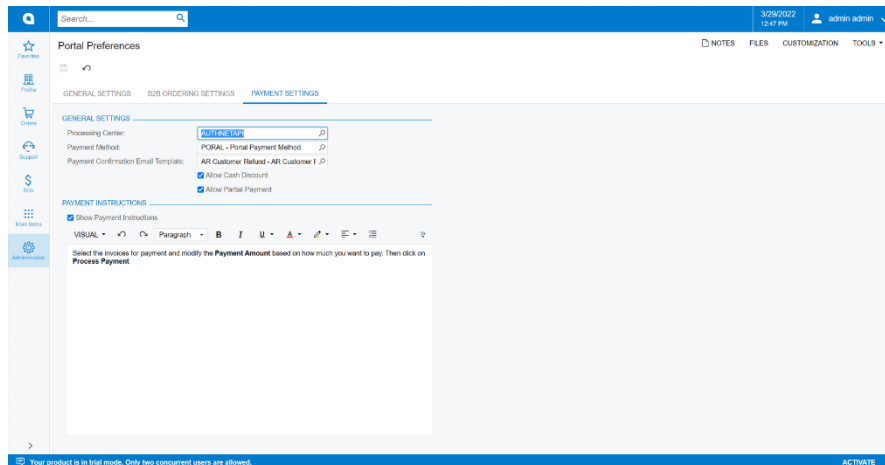
Acumatica enhanced its popular Customer Self-Service Portal to optimize the payment experience for ERP users and their customers.

- Tailor the Portal's settings with different options and instructions.
- Publicize discounts for full payments
- Promote flexibility in payment amount and types
- Leverage email templates to create confirmation emails and automatically distribute them when customers submit payments
- View up-to-date customer account activity and outstanding balances on the centralized system. Confirmed payments update customer accounts in Acumatica Accounts Receivable module.

IMPROVE CUSTOMER EXPERIENCE

Customers can use the Portal to self-manage their account from checking order status to paying bills. Empower customers with the ability to:

- View all of their invoices and choose to select which ones to pay
- Pay all invoices at once
- Select a payment method and quickly submit payments
- Take advantage of cash discounts
- Make installments or partial payments based on the Portal's instructions.
- Receive an email confirmation when payments are posted



The Acumatica Self-Service Portal displays payment options and instructions.

KEY BENEFITS

STREAMLINE PAYMENT PROCESS

- Enable customers to access invoices, choose a payment option, and submit payments
- Customize instructions and responses for customers
- Automatically adjust invoices and notify customers when a payment is processed

BOOST CUSTOMER SATISFACTION

- Allow customers to self-manage accounts and control payment methods and timing
- Support payment flexibility, partial payments, and customer preferences
- Promote and apply discounts for cash payments

ENCOURAGE TIMELY PAYMENTS

- Display outstanding balances on the portal to remind customers
- Enable customers to select invoices to pay or pay all invoices
- Present cash discount options to encourage full payments

FEATURES AND CAPABILITIES

Customer Self-Service	Gives customers access to account information and enables them to self-manage their orders, and payments.
Flexible Payment Options	Enables customers to view payments, choose the payment method and amount, and submit payments directly on the Portal. Customers can opt to pay the outstanding balance for all invoices, choose one to pay, or make partial payments.
Discounts for Cash Payments	Allows Acumatica users to offer customers discounts off their outstanding bills when they make full cash payments on the Portal.
Customizable Portal Settings	Enables ERP users to create portal settings that reflect their desired payment options. Users can click designated fields to offer partial payments, discounts, and options to select invoices to pay or pay all outstanding invoices.
Online Instructions	Allows users to personalize payment instructions for customers and post the instructions on the Portal.
Email Templates	Provides email templates for users to customize and use as confirmation emails. Automatically sends confirmation emails to customers when payments are cleared.
Account Receivable (AR) Integration	Integrates with the ERP's Accounts Receivable module; updates AR data when payments are received and reflects approved payments in AR and Portal.
Account Overview	Gives customers access to account history, invoices, balances, due dates, payments received, and amount owed.

“Acumatica is easy to learn, and I find it very intuitive. You can do a simple keyword search and the results are automatically categorized. It’s a one-stop shop. I can see everything I need all in one dashboard in about 15 seconds.”

— CRAIG MATUSINKSI, E-COMMERCE AND SOCIAL MEDIA DIRECTOR, KEVINS WORLDWIDE

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.

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