

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.** Automate and integrate sales workflows to manage leads, tasks, alerts, events, and fulfillment while ensuring consistent branding, searchable custom fields, and seamless links between emails, opportunities, quotes, and orders.
- **Unify Customer Interactions with Activity Stream.** Grasp the full context of any customer relationship at a glance. The Activity Stream provides a clear, readable layout of all related communications and tasks, making it easy to search, filter, and drill down into the specific details you need to drive shared success.
- **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 with workflow-assisted lead assignment and sales management. Collaborate on deals, create and share quotes and orders, and easily access linked communications, invoices, and details.

AI-Powered Insights

Quickly analyze recent customer interactions to provide a quick overview of customer sentiment, key details, and recommended next steps, helping you save time and focus on actionable solutions.

Lead Management

Import, sort, and classify leads from spreadsheets. Assign them using custom criteria, capture details for each lead type, and automatically generate targeted lists for tailored campaigns.

Approvals and Workflows

Ensure accountability with automated workflows that manage approvals, reassign unanswered requests, and enforce account-level access controls. Trigger cross-department notifications, track and delegate tasks, and automatically reassign work when conditions aren't met. Gain full visibility into approval histories, actions, timestamps, and pending decisions.

Account and Contact Management

Convert leads into accounts and contacts linked to activities, opportunities, and documents. Bulk import and edit records from Excel, manage customer and prospect accounts, and use AI-powered mobile image recognition to capture business card contacts.

Email and Campaign Management

Use brand-consistent templates for newsletters, campaigns, and direct messages. Create emails in Outlook or Gmail with predefined templates, combine documents, send targeted communications, and track results through native SendGrid integration.

Dashboards and Reporting

Access robust opportunity summary reports filtered by criteria such as stage, salesperson, or close date. Create announcements and default dashboards and accelerate decisions with customized views of your business and departmental details.

Multiple-Document Emails

Save time by attaching multiple shipments or purchase orders to one email or combine documents into a single file to ensure customers and vendors receive all necessary information efficiently.

Instant Margin Visibility

Make faster, smarter negotiation decisions by viewing estimated margin amounts and percentages on opportunities and quotes, helping you assess profitability early and protect your organization's financial health.

Centralized Communication

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

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.

Lifecycle Management

Track clients from prospecting to closing and up-selling in one integrated system. Maintain full communication history and gain a 360-degree view of activities with drill-down insights to 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, and communicate with contacts. Capture leads from web forms, lists, and events, send branded emails, track top channels, and create custom landing pages to collect website and campaign leads.

Target Lists

Create target lists of contacts or leads by uploading records from a file or entering them manually. Define criteria for dynamic lists, such as geography or product interest.

Integrated Document Management

Attach digital documents to leads, opportunities, and accounts, and link previously uploaded files without re-uploading. Manage a centralized repository for collateral, templates, price lists, images, videos, and other documents.

Partnership Marketing

Assign leads to a parent account within your organization or to an external partner. Email leads to a partner or allow them to view information directly in 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.

ISO 20022 Address Formats

Adherence to ISO 20022 for improved address data accuracy, compatibility with international systems, enhanced data exchange, and streamlines international transactions.

Prevent Duplicate Records

Keep customer and vendor information accurate with proactive duplicate checks that compare new entries against existing accounts, allowing you to prevent data clutter as your business grows.

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.

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 on Acumatica, visit www.acumatica.com or follow us on [LinkedIn](#).