Customer Support Management

Respond quickly to customer requests, streamline support processes, and improve the customer experience with Acumatica's CRM software. Acumatica delivers everything you need to manage all aspects of the customer journey with improved customer service.

- **Self-Service Portal lets clients find answers and report issues**
- **Case management tracks customer, vendor, and employee issues**
- **Contract management links cases to contracts and services plans**
- **Integrated document management for client history**

Key business benefits

- Respond rapidly to customer requests from first contact through post-sales interactions.

- Enable customers to access their cases via the secure portal.

- Share client requests with staff and create automated alerts.

- Improve service with access to customer history when filling orders.

- Get one-click access to contacts with CRM add-ins for MS Outlook and Gmail.

Related resources

- 5 Ways CRM Maximizes Profitability > LEARN MORE

- Grow Customer Satisfaction with Unified CRM > LEARN MORE

- Schedule a Personalized Demo > LEARN MORE

Reduce Customer Response Times, Improve Satisfaction, Lower Costs

Acumatica Customer Management delivers customer relationship management (CRM) applications for managing, and customer accounts.

IMPROVE CUSTOMER SERVICE AND BOOST SALES

- **Get an ERP and CRM that work together**. Keep customer information up to date and accurate. Track client interactions, complaints, purchases, and more.

- **Leverage integrated content management.** Access all quotes, invoices, and support cases with a 360-degree view of customer data. Address data flows seamlessly between business accounts and contact forms, including different address info for contacts.

- **Be proactive.** Reduce response times and improve satisfaction with service management tools. Anticipate and address customer problems and identify upsell opportunities. Prevent delays by tracking activities, delegating, and reassigning tasks and sending alerts.

FOSTER COLLABORATION WITH CUSTOMER PORTAL

- **Provide customer self-service.** Give customers access to data on their interactions and enable customers to see activities online so they can track orders, manage support cases, check balances due and payments received.

- **Share information.** Provide customers with 24/7 access to key content, including marketing and educational materials, user guides, and FAQs.

- **Foster true team collaboration.** Enable all appropriate support staff to support cases and promote a team approach with unlimited server pricing allows you to include everybody in automated and integrated workflows.

"If a mistake is made by us, no matter what it is, there's often a cost involved…Using cases in Acumatica, we can identify them and pick them up as soon as possible…without customers we don't exist, and we try to give the best service possible."

–Tim Patton, ICT Director, SAM

Case Management

View case activity by conversations to quickly retrieve case-related data linked to tasks, events, and activities. Base workflows on case severities, escalation paths, and priorities and send reminders. Extend case management to customers, vendors, and employees, allowing users to submit, assign, and track assistance requests. Track case durations from initial response to case closure.

Business Intelligence

Deliver a 360-degree view of customer activities and information with drill-down capabilities, so everyone in your organization can better serve the customer. Improve case management performance metrics to automatically track the initial date and time a new case is created, the expected response date and time, and the date and time the initial response was completed.

Service and Support Automation

Reduce response times and support costs. Create a case from captured web forms or manual entry. Assign and escalate cases per policies. Automatically reassign outstanding tasks when pre-defined conditions are not met. Ensure accurate billing with integrated financials. Extend case management to employees for service requests.

Approvals and Workflows

Establish automated notifications across departments based on business activities and notify support specialists when open support cases are closed. Track activities and delegate tasks. Automatically reassign outstanding tasks when pre-defined conditions are not met. Expedite approvals by automatically rerouting unanswered approval requests to a different approver. Boost customer satisfaction with faster time-to-resolution service level agreements and improve returns processing with automated workflows such as service order creation and return merchandise authorizations (RMAs) from support cases.

Reporting and Dashboards

Accelerate decision-making with reporting tools that deliver customized views of your business overall and focused views of the support department and functions. Provide robust out-of-the-box summary reports reporting on multiple criteria. Create announcements and dashboards for each service manager. Use dashboards and favorites to view real-time information in tabular or graphical form.

AI-Powered Insights

Refresh your understanding of opportunities and cases instantly without reading through entire records. AI-generated summaries analyze recent interactions to provide a quick overview of customer sentiment, key details, and recommended next steps, helping you save time and focus on actionable solutions

Lifecycle Management

Track customer contacts through prospecting, closing, and up-selling for a complete history of communications.

Centralized Communication

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

Customer Self-Service Portal

Furnish 24/7 customer access to account information, support cases, and the latest updates through the online self-service portal.

Team Troubleshooting

Assign cases to a workgroup for team collaboration. Escalate cases/tickets without having to email documents and case history.

Email Management

Configure email templates by branch. Send standard emails to address common problems using standard templates to ensure current and consistent messaging. Create emails for contacts, employees, and leads with predefined, brand-consistent templates and send features for automatic distribution.

Data Integrity and Management

Configure rules to check for duplicate contacts and leads with warnings prior to creating new records. Leverage Google and Bing address services to look up company and contact addresses.

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, orders, and support cases without navigating away.

Workstation Flexibility

Enable service personnel to access user-customized views of tasks, appointments, and cases on any browser.