Acumatica
The Cloud ERP

Maximize Growth and Boost Customer Satisfaction with Unified ERP and CRM

THE JOINT TECHNOLOGY CREATES GREAT FIRST IMPRESSIONS AND CONVERTS THEM INTO LASTING CUSTOMER RELATIONSHIPS.

Sales and Net Promoter Scores soar when customer-facing employees provide the targeted service organizations need to thrive.

Instead of empowering employees, technology often frustrates them. Users waste time toggling between disparate applications, searching for related information across different operations only to find conflicting data. In addition to preventing employees from visualizing accurate customer history, these siloed applications force them to re-enter data that exists in multiple applications.

Business goals suffer when employees cannot immediately access insights to inform decisions. Consequently, they develop workarounds that can bypass workflows and compromise quality. Customer requests and qualified leads fall through the cracks while employees struggle to close deals efficiently and support clients.

Unified ERP and Customer Relationship Management (CRM) technology can transform SMBs and set sales on an upward trajectory. Built into Acumatica's foundation, CRM puts all customer information at employees' fingertips. Immediate access to the single source of organizational truth enables users to move seamlessly between sales, marketing, support, and core business applications—on one interface. The 360-degree views of customer data empower employees to make informed decisions quickly and collaborate easily.

Machine learning and artificial intelligence take integrated workflows to the next level of efficiency, automatically populating forms, updating account information, and pushing tasks through to completion. Embedding ERP and CRM also cuts maintenance costs associated with implementing and upgrading ERP and CRM interfaces.

Custom dashboards keep tasks and priorities front and center, ensuring employees stay on top of evolving responsibilities and gain immediate access to what they need to keep your business growing and customers happy.

INSIDE THIS EBOOK



See how Acumatica ERP with embedded CRM helps attract new customers, close sales faster, and improve customer service while streamlining client-facing operations.



Unleash the Power of Unified ERP and CRM to Gain Efficiency and Achieve Revenue Goals

Technology can enable or impede success. When individual teams adopt technology to meet specific needs, information siloes sprout up and eventually stifle productivity.

Marketing uses demand generation programs to produce leads efficiently, but sales teams struggle to research individual leads without visibility into each MQL's history.

When following up on a service request, support staff often ask customers to repeat the same information they told their account rep. They also manually enter the redundant data into a separate application. Contact information quickly becomes outdated when someone enters new information in one application that has not been manually added to other applications.

With CRM embedded into its foundation, Acumatica makes all customer information from leads, opportunities, quotes, orders, shipments, invoices, payments, and service requests available to everyone.

Sales and support rely on one source of customer truth to inform their decisions. When a salesperson calls a customer via Acumatica, they instantly see all open support cases, notes, and even open AR (Accounts Receivable) invoices, which informs their decisions and helps them resolve issues faster. Marketing can design campaigns based on customer behavior, preferences, and persona. Managers gain full transparency into CRM activity and account history as well as real-time key performance indicators (KPIs).

Users easily move between marketing, sales, finance, and support functions by clicking tabs in the application and seeing their requested data pop up. Embedded CRM lets them create and track campaigns from the first touch through implementation.

Rest assured, knowing whenever someone edits a lead or account, the system automatically updates corresponding records in each application. Role-based views give users immediate access to everything they need while protecting sensitive data.



ONE VERSION OF CUSTOMER DATA

Drive accuracy and eliminate rework with one version of customer data.



INTEGRATED WORKFLOWS

Tear down siloes, promote collaboration, and reduce errors with integrated workflows.



EMBEDDED CRM

Launch integrated marketing campaigns for more leads and shorten the sales cycle with CRM.

Acumatica empowers organizations to efficiently manage business and CRM activities on one system with complete transparency in marketing and sales pipelines.

"Having opportunities in CRM gives us visibility into the sales project pipeline where we can see in real-time what's close to closing as well as what's in the pipeline."

– JAMIE VOS, OWNER/GENERAL MANAGER, SECURITY SOLUTIONS

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HEAR WHAT OUR CUSTOMERS HAVE TO SAY:

"We really needed to have one integrated system where our sales teams could log their opportunities, and we could track a sale and project through to a final invoice…Acumatica works perfectly; it handles project accounting, cash flow, project monitoring… But Acumatica is not just confined to project-based operations. Other departments like sales and marketing love it as well."

– ELIZABETH BARRATT, MANAGER, PROJECT EXCELLENCE, ASK AFRIKA

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Extensible, Future-Proof Cloud Scales to Meet Evolving Business Needs and Support Organizational Growth

Business leaders know they cannot pin tomorrow's success on yesterday's accomplishments. In other words, what worked yesterday may not work tomorrow. Growth requires cost-effectively scaling the infrastructure to meet changing needs.

On-premises platforms lack the capacity to facilitate ongoing growth. They cannot keep pace with future-oriented organizations that turn to modern technologies to support growing customer and employee bases.

Acumatica's future-proof Cloud technology enables organizations to scale their core business platform to support unlimited users and companies. Best of all, organizations can choose what works best for them today and scale to support tomorrow's needs. Companies can opt to have their system hosted on-premises and move to a public or private cloud later.

The ERP's open architecture and cloud-based platform streamlines upgrades. Companies can use Acumatica's open APIs (Application Programming Interfaces) and low-code/no-code tools to integrate third-party applications like HubSpot and SendGrid onto their ERP platform. Users can easily track, execute, and measure joint campaigns.

SUPPORT ANYWHERE, ANYTIME WORK

Acumatica's mobile-friendly platform lets users work from any browser-equipped device and enjoy the same experience on the mobile device as they do on their PCs. Employees can access real-time data and make changes, knowing the updates will be automatically applied throughout the system.

Organizations never have to worry about running out of seats with unlimited users and can assign users access based on their business needs.



MOBILE BUSINESS PLATFORM

Built for AI and machine learning, mobile platform supports open connectivity, IOS and Android devices.



RAPID INTEGRATIONS

Flexible, open architecture is designed for no-code and low-code integration.



CONSUMPTION-BASED LICENSE

Licensing supports unlimited number of users for unmatched flexibility and collaboration.

With Acumatica, you will always have immediate access to everything you need to seize opportunities for growth.

"Having everything in one place – having our CRM contacts alongside the orders that are flowing through – and being able to report on it."

"Having the order system and the CRM separate from each other before, we couldn't see too easily what our sales efforts were yielding, whereas now we can, which is good. If we can see what's working and what isn't, we can grow easier."

– JUSTIN LEFLAIVE, FINANCE MANAGER, TOFFELN

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HEAR WHAT OUR CUSTOMERS HAVE TO SAY:

"We use the Acumatica Customer Management Suite religiously to track opportunities and leads, and what's going on with a contact, and we love that Acumatica integrates well with the Microsoft Office suite because we are also strong users of Excel, Power BI, and Outlook."

– PATRICK MADISON, CFO, KORPACK

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Drive Growth and Customer Retention with Robust, Integrated CRM

Experience matters. From the first impression throughout the life cycle, positive customer experiences fuel sales and cross-selling.

Managers can spend days crafting marketing campaigns and training salespeople and still reap less than stellar results. Why? Customers yearn for clear, consistent messages and reject the inconsistent and uninformed messages siloed operations produce.

Disparate marketing, sales, and support systems can automate wide-reaching campaigns but cannot inform decisions and personalize messages that drive results because they cannot provide a complete customer history at-a-glance.

With CRM embedded in its ERP platform, Acumatica supports a targeted, cohesive customer journey as well as a seamless connection between business and customer management applications. Users can plan, execute, and measure marketing and sales activities on one integrated platform that automatically updates corresponding financial records.

Leads no longer fall through the cracks but are automatically entered and tracked. Users can upload contacts by clicking an email in Microsoft Outlook, scanning a business card to the mobile app, or importing a list. Acumatica assigns tasks and sends follow-up alerts to ensure leads are fully qualified and sales fully prepared. Sales can also see the entire pipeline and status information at-a-glance and drill down to access records.

Case management assigns support tasks and manages activities. Marketing, sales, and support teams can respond to customer needs anytime, anywhere using the mobile app.

In addition to attaching relevant details to each record, integrated workflows differentiate opportunities by classes and move them through the process to focus sales and support efforts. Companies can even integrate Acumatica with other CRM applications, like HubSpot and SendGrid, for more comprehensive marketing and sales management on one unified platform.



MICROSOFT OUTLOOK PLUG-IN

Create new leads and contacts from inboxes; get one-click access to contacts.



METRICS-BASED CAMPAIGNS

Use metrics-based marketing to launch, measure and improve campaigns.



CUSTOMER SELF-SERVICE PORTAL

Give customers 24/7 access to account information, support cases, and updates on online portal.

Acumatica's embedded CRM application delivers full-service customer management capabilities with real-time insights that inform decisions and optimize workflows.

"What really threw us over the top with Acumatica is that it offered a full quote-to-cash cycle, and it overlaid on top of a solid of our accounting system. Acumatica offered a service package, purchasing, inventory, Client Relationship Management (CRM), quoting, manages projects and sales orders – all right there in one Operating System. We were shocked to find all of this functionality in one system."

– DERRICK ELLEDGE, VP OF OPERATIONS & CO-OWNER,
POWER STORAGE SOLUTIONS

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HEAR WHAT OUR CUSTOMERS HAVE TO SAY:

"With Acumatica, one of the big changes is that we can now track a lead to a customer with all the associated notes along the way so we can capture that information…With better information and improved reporting, we're expecting to see better sales results and improved customer retention."

– SCOTT MCCALLA, CHIEF STRATEGY OFFICER,
INTERNATIONAL PIPE & SUPPLY, LLC

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Reports and Dashboards Use Real-Time Insights to Inform Decisions and Set Priorities

Every day employees set out to meet their goals. However, unanticipated circumstances can distract them from strategic activities.

Acumatica keeps priorities front and center. Integrated workflows move leads through marketing and sales funnels. Artificial intelligence and machine learning streamline processes. Every time users view their homepage real-time reports show them their priorities. They can drill down for details and view the impact of their efforts on organizational goals. With customized dashboards, users will never forget a task or lose track of an important project.

Acumatica tracks each marketing campaign and displays activities, costs, and projected revenue in pie charts, pivot tables, bar charts. Sales managers can immediately see high-value opportunities and their stage in the sales funnel.

Real-time analytics let sales managers see pipeline status and the probability of closure for all accounts. Acumatica automatically updates potential revenue and success rate as the opportunity moves through the sales funnel. Changes to ERP and CRM data also trigger business events that enable users to quickly execute a follow up task, such as sending out an email. Meter tiles compare actual results versus goals and enable managers to drill down for account details. Bar charts contrast bookings for current and previous quarters or years.

360 VIEWS OF CUSTOMER DATA

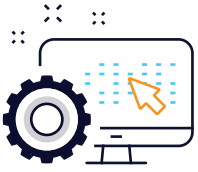
Trace the customer journey from the moment a lead enters Acumatica via Microsoft Outlook, a website captures, or imported list through billing. 360 views connect all application data in a single database provides a real-time and complete 360-degree view of every business area.

Rest assured, knowing the Acumatica accurately portrays the account history in each record and users no longer base decisions on inaccurate or incomplete data.



QUICK ACCESS TO KEY TASKS

Pin essential activities to the top of activity lists for quick access.



CUSTOMIZED DASHBOARDS

Boost decision-making with customized views of overall business and focus views of functions.



REAL-TIME VISIBILITY

Gain accurate, real-time visibility into activities and performance with personalized reports, dashboards, and shared, centralized database.

Acumatica integrated CRM streamlines account management, boosts sales, and improves customer satisfaction with real-time reporting.

"Acumatica's integration with our websites and the ability to better track customers was great for us…Reporting is very robust, and the ability to create reports specific to us is huge. Now that we have a CRM, we are creating an outbound sales division and doing account management, which was hard to do before because we had no central resource for data."

– STEVE CATES, PRESIDENT, RAY ALLEN MANUFACTURING

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HEAR WHAT OUR CUSTOMERS HAVE TO SAY:

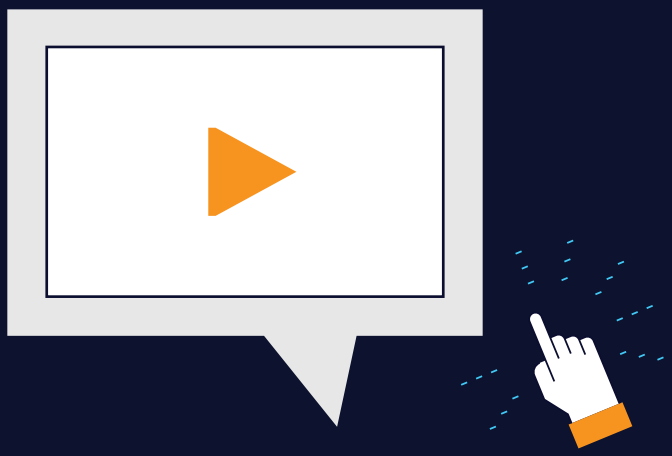
"They can see which customers ordered in the past and get reports. With access to CRM, they can see notes and activities entered by the customer service team. There is improved communication between our reps and the inside team, which we didn't have before."

– JODI ANSTANDIG, FINANCE DIRECTOR, BIOPELLE

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Hear from an Acumatica customer on how their business relies on Acumatica CRM for their success.



CLICK TO VIEW THEIR STORY

"Acumatica has been a game changer. It's made a huge difference in how we do things, how we can access everything we need from anywhere, and allowed our salespeople to work remotely."

– HECTOR PINTO, CEO AND CO-FOUNDER
QUALITY MATERIAL HANDLING

Generate Quality Leads and Boost Sales with Exemplary Support

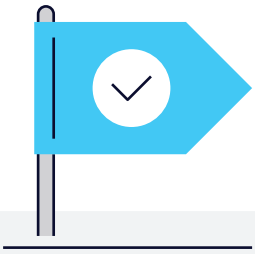
Acumatica ERP with CRM accelerates growth in future-oriented companies by revolutionizing marketing, sales, and support functions on one unified platform.

The unified system provides full transparency into the customer journey. Customer information is always up to date and available at-a-glance.

Marketing knows what campaigns worked well and why, so they can target their efforts and reduce costs. Sales teams understand what sparked a lead's interest and have the tools to follow up effectively. Customer support can rapidly respond to customer needs at any point in the sales cycle, from the first impression to sales and fulfillment, billing, and after-sales service requests.

Best of all, because CRM is embedded in the Acumatica platform, the system operates seamlessly with core business applications. Closed deals trigger accounts payable and billing workflows and ensure the finance team has complete and accurate data.

With customized dashboards, users always know their priorities and have what they need to proceed at their fingertips. Acumatica ERP with CRM helps you build lasting customer relationships starting with the first impression.



"I love the idea that our customers will have one place where they can view information on their orders and the status of that order (production date, print date, invoice)....It's technology like this that puts us one step ahead of our competition rather than being a step behind."

CALEB HARRIS, SENIOR VP - BUSINESS DEVELOPMENT, INK

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Acumatica
The Cloud ERP

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.