> CUSTOMER STORIES

HubSpot Connector

Acumatica CRM with HubSpot Connector enables you to automatically launch, measure and manage campaigns between HubSpot and Acumatica's unified CRM and ERP. Synchronize contacts, transfer campaign results, and initiate follow-up sales calls — automatically.

- **Consolidate HubSpot and Acumatica activities**
- **Launch and track integrated marketing campaigns**
- **Synchronize customer and lead data**
- **Deliver centralized access to all customer and prospect data**

Key business benefits

- Create, launch, and track marketing campaigns on one integrated solution.
- Launch campaigns in HubSpot and send analysis to Acumatica.
- View all marketing and sales information on one screen.
- Collect, measure, and send marketing-qualified leads to sales.
- Equip sales with all prospect and customer data on one system.
- Eliminate manual data entry for contacts, campaigns, and updates.

Related resources

- Unify ERP and CRM with Acumatica > LEARN MORE
- Maximize Profitability with Acumatica CRM > LEARN MORE
- Schedule a Personalized Demo > LEARN MORE

Execute End-to-End Marketing Campaigns Connected to Acumatica

Respond to qualified marketing leads in real-time with Acumatica's seamless HubSpot Connector. Execute demand generation campaigns and then automatically qualify and assign leads. Acumatica HubSpot Connector tracks campaign progress, eliminating resource-intensive data entry and imports. Optimize marketing and boost sales by connecting Acumatica's unified ERP and CRM with the industry's top marketing automation solution, HubSpot.

- Acumatica immediately assigns each lead to the appropriate salesperson and triggers alerts to keep the follow-up process progressing.
- Qualified leads equip sales to manage prospects and support customers more efficiently while alleviating manual searches and vetting.
- The integrated system automates routine marketing follow-ups and lead nurturing, sending out confirmation emails and user alerts without intervention.

LEVERAGE A CUSTOMIZABLE, TURNKEY INTEGRATION

Take advantage of the out-of-the-box HubSpot Connector to synchronize sales and marketing data without time-consuming customization and data imports.

- Give sales and marketing teams immediate access to real-time information to inform their decisions and streamline operations.
- Spur productivity by scheduling HubSpot imports at pre-defined times, such as the beginning of the workday or after each demand generation campaign.
- Use default-field mapping to create one-way or bi-directional data transfer. For example, the sales team can return unqualified leads.

"Acumatica has been instrumental in helping us create sales, marketing, and customer relationship management processes."

–David Salmon, Director of Information Services, ComCenter

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Integrated Marketing Campaign Management

Enable customers to create, execute, and manage marketing campaigns across both platforms. Marketing can capture leads, launch targeted campaigns, view the results, and respond in real-time on Acumatica CRM.

Out-of-the Box and Flexible Connections

Enable users to immediately connect HubSpot and Acumatica with out-of-the-box default field mappings. Users can also use custom field mappings to create custom data transfer points.

Automated Lead Management

Automatically qualify leads in HubSpot and transfer them to Acumatica. Immediately assign new MQLs to the appropriate salesperson.

Sales Automation

Push new MQLs to each salesperson, enabling them to follow-up to new leads immediately. Present a full view of opportunities and contacts to inform decisions. Improve efficiency with workflow-assisted lead assignment and management.

360-Degree Views of Customer and Prospect Data

Deliver a 360-degree view of customer information and enable users to drilldown for details.

Contact Management

Synchronize contact information across HubSpot and Acumatica.

Email Management

Provide email templates for users to customize and use as confirmation emails. Automatically send confirmation emails to customers when payments are cleared.

Unified ERP and CRM Management

Enable HubSpot to connect with Acumatica CRM, which is embedded in Acumatica's ERP Platform. The unified platform integrates marketing, sales, customer management, and financial operations.

Customer Case Management

Track, assign, and manage customer and employee support cases via integration to Acumatica CRM.