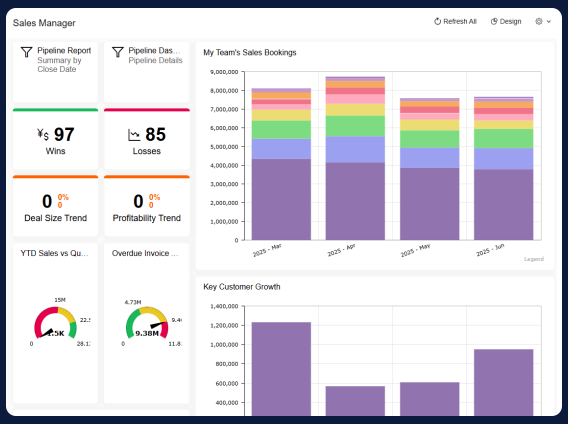
Acumatica
The Cloud ERP

DATASHEET · CRM

Customer Relationship Management

Connect marketing, sales, and customer support with CRM native to Acumatica ERP. Work from one connected customer view from lead through order and service.

- Manage opportunities through quotes and orders with current inventory availability and estimated margins.
- Resolve support cases faster with connected customer, financial, order, project, and service data.



Turn Customer Activity into Coordinated Action

Improve pipeline visibility, strengthen accountability, respond faster, and deliver a consistent customer experience with configurable processes that fit how your business works.

INTELLIGENT, INTEGRATED, AND INTUITIVE CRM

- **Adapt CRM to your business.** Configure stages, classes, screens, workflows, assignments, approvals, alerts, and escalations to match how your teams work.
- **Work from one customer truth.** Keep customer activity, financials, inventory, orders, fulfillment, projects, and service connected without re-keying or synchronization gaps.
- **Connect customer activity to execution.** Turn opportunities into quotes and orders, relate cases to contracts and billing, and connect campaign activity to revenue and profitability.
- **Focus attention where it matters.** Use AI-assisted sentiment, response priorities, summaries, next steps, and suggested replies to identify urgent opportunities and cases.
- **Take CRM wherever work happens.** Give sales, service, and field teams mobile access to customer records, opportunities, account financials, order status, and support cases.
- **Give customers secure self-service.** Let customers browse products, place and track orders, view and pay invoices, and manage support cases online.
- **Measure performance clearly.** Monitor pipeline, forecasts, campaign results, response metrics, and departmental performance with configurable dashboards, reports, and Generic Inquiries.

Key business benefits

Quote confidently with current inventory availability, estimated margins, and related-item suggestions.

Connect campaigns to results with targeted outreach and connected revenue and profitability data.

Resolve cases faster with routing, service-level tracking, and AI assisted insights.

Expand customer self-service for orders, invoices, payments, and cases.

Extend CRM company-wide without per-user fees as teams grow.

Related resources

Acumatica CRM Fuels 90% Growth
LEARN MORE →

Grow with Unified ERP and CRM
LEARN MORE →

Schedule a Personalized Demo
LEARN MORE →

> "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

Capabilities

SALES AUTOMATION

Lead Management

Capture leads from forms, lists, events, and imports. Route them to sales teams or partners and convert qualified leads into accounts and contacts.

Account and Contact Management

Link accounts and contacts to activities, opportunities, cases, and documents. Support bulk updates and mobile business-card capture.

Opportunity, Quote, and Order Management

Track pipeline stages and activities, collaborate on deals, and create linked quotes and orders without re-entering data.

Real-Time Inventory and Margin Visibility

View on-hand, available, and available-for-shipping quantities plus estimated margins in opportunities and sales quotes.

Item Suggestions

Surface substitute, upsell, cross-sell, and other related items earlier in opportunities, sales quotes, and project quotes. Track the final item sold and where the change occurred.

MARKETING AUTOMATION

Campaign and Email Management

Create branded emails and targeted campaigns using reusable templates. When SendGrid is enabled, synchronize category-level preferences and honor them automatically during mass email processing.

Lead and Target Lists

Build static or dynamic audiences from leads and contacts using geography, purchase history, product interest, and other criteria. Keep dynamic lists aligned as customer data changes.

Campaign Performance and Profitability

Track responses, conversions, costs, revenue, and profitability by connecting marketing activity with sales, billing, and financial data. Compare results across campaigns and channels.

Connected Marketing Tools

Work with Outlook, Gmail, and SendGrid, and extend marketing automation with the optional Acumatica for HubSpot Connector.

SERVICE AND SUPPORT

Case Management and Workflows

Route, assign, escalate, and track cases by severity and priority with configurable workflows, notifications, and communication history.

AI-Assisted Customer Communication

Prioritize opportunities and cases with AI-assisted sentiment and response priorities. Review summaries, next steps, and suggested replies in the Activity Stream.

Service Levels, Contracts, and Billing

Track response and resolution metrics, connect cases to contracts or service plans, and bill support activity through integrated financials.

CUSTOMER PORTAL

B2B Online Ordering

Let customers browse catalogs with real-time inventory and customer-specific pricing, place orders, and review order, shipment, and invoice status.

Account Self-Service and Payments

Give customers secure access to balances, invoices, statements, payments, open orders, and historical documents, with options to make invoice payments online.

Online Case Management and Knowledge Sharing

Let customers submit, update, track, and reopen cases, exchange messages and files, and access shared FAQs, policies, procedures, and other knowledge content.

SHARED CRM CAPABILITIES

Embedded ERP Data

Connect customer activity with financials, inventory, orders, fulfillment, projects, field service, and other operations.

Dashboards, Reporting, and Generic Inquiries

Monitor pipeline, forecasts, campaign performance, service metrics, and results through configurable dashboards, inquiries, and reports.

Documents and Data Quality

Link documents to CRM records, centralize collateral, prevent duplicates, and maintain accurate contact and address data.

Activity Stream and Communication History

Search emails, calls, tasks, notes, and attachments across accounts, leads, opportunities, cases, and campaigns.

Workflows, Approvals, and Task Management

Automate assignments, alerts, approvals, escalations, and follow-up while maintaining status and history.

Company-Wide and Mobile Access

Give every team role-based web and mobile access through Acumatica's unlimited-user model.

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**.

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