

Customer Management

The first mid-range financial application designed for the web that has the power, usability, and speed of client-server applications.

Integrate Sales, Marketing, and Customer Service with your financials to close more sales and improve customer loyalty.

The customer management module delivers a customer relationship management (CRM) solution which will automate your sales processes so you can respond faster to customers and partners.

KEY BENEFITS

Customer Lifecycle Management

Respond rapidly to customers from the time they first enter your website, through the sales process, through billing, and during customer service requests.

Accessible from Anywhere

Access your CRM features from anywhere using only a web-browser.

Fast Time to Value

Acumatica installs quickly and a single server license can be accessed by everybody without installing client software.

Improve Profitability

Integration with financials provides reports linking marketing campaigns to account profitability to provide a complete view of your business.

Team Approach to Sales and Service

Collaboration features are easily shared by all to promote a team approach to customer management. Per-server pricing allows customers to involve everybody in automated workflow processes.



Workflow and security allow you to customize approvals to match your sales process while managing permissions for each screen object and customer account.

Key Features

Sales Automation

Sales tools improve information flow, reduce sales cycles, increase close rates, and improve sales efficiency. Sales teams are made aware of all activities which influence their customers. Lead assignment and workflow help manage sales processes to improve efficiency.

Marketing Automation

Marketing tools manage leads, improve conversions, measure campaign performance, communicate with contacts, and improve productivity. Reports link campaigns to profitability.

Service and Support Automation

Service management tools reduce response times, improve customer satisfaction, reduce support costs, and accurately bill transactions. Support cases are assigned and escalated according to workflow policies. Cases are billed according to client support contracts.

Analytics and Forecasting

A complete set of reporting tools improve forecasting, improve information flow, measure conversion rates, and reduce deviation from targets. Reports and dashboards can be customized to provide real-time performance indicators.

Sales Contacts

sales@acumatica.com

+1 (703) 873-7570

Customer Management

Implement customer management on modern technology to achieve cost savings and future flexibility.

RUNTIME REQUIREMENTS

Acumatica can be deployed on-premise, hosted at a datacenter, or purchased as SaaS.

On-Premise and Hosted Requirements

Application Server

- Microsoft Windows Server 2003 or 2008
- Microsoft .NET Framework 3.5 or higher

Database Server

- Microsoft SQL Server – Express, Workgroup, Standard, or Enterprise

Acumatica can be installed on a dedicated server, a virtual server, or a cloud services platform.

SaaS Requirements

A browser and an Internet connection - the servers, operating environment, and upgrades are all included. Acumatica is offered as a service using Windows Azure.

MORE INFORMATION

For more information please visit our website www.acumatica.com.

- Videos (/productvideos)
- VAR Partners (/varpartners)
- Hosting Partners (/hostingpartners)
- Request access to demo (/demorequest)

HOW TO PURCHASE

Acumatica is sold through a global network of value added resellers (VARs) who provide business planning, installation, customization, support, and business expertise.

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Additional Features and Benefits

Additional Acumatica AR benefits are provided in the table below.

Feature	Description
Integrated document management	An integrated document management allows teams to manage a central repository of customer collateral, email templates, price lists, contract templates, pictures, videos, and other documents so your entire company uses up-to-date materials.
Integrated financials	Acumatica customer management is integrated with billing and financial data so you link campaign response rates and sale performance to overall profitability.
Lead and list management	Aggregate leads from your website, purchased lists, trade shows, events, with those manually entered by salespeople. Assign leads to sales or partners according to customized criteria and data.
Account and contact management	Leads can be converted into business accounts which are linked to contacts, activities, tasks, opportunities, cases, and documents to provide a 360 degree view of the account.
Opportunity management	Opportunities are centrally managed so everybody can collaborate to close deals. Opportunities are linked to items in your product catalog so when deals close, finance can quickly issue an invoice.
Case management	Cases can be viewed by all stakeholders along with the tasks, events, and activities that are linked to them. Case severities, escalation paths, priorities, and reminders help improve customer service.
Contract management	Service and support automation is linked to customer contracts so service agents can determine the proper level of service. Service rates can be contracted per incident, per hour, or prepaid.
Online marketing	Rapidly create customized landing pages which capture leads originating from your website, a Google advertisement, a direct mail piece, or other source.
Email management	Utilize email templates to send prospects and customers professional looking emails that are consistent with branding guidelines. Acumatica can link email to customers and track responses.
Segmentation tools	Define custom attributes that are important to your business. Collect information for different lead types so you can effectively target more than one market.