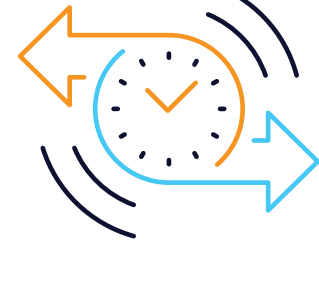


# Put Profitability in the Driver's Seat with Acumatica CRM

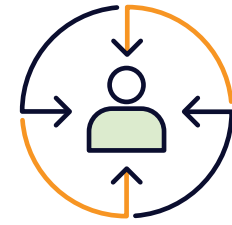
Acumatica ERP with embedded CRM makes great first impressions and turns them into lasting customer relationships.

## 1 BOOST SALES WITH MORE QUALITY LEADS

Siloed marketing and sales programs cannot drive ongoing growth. Acumatica accelerates growth by revolutionizing marketing and sales. Automate operations and empower teams with real-time insights that maximize results. Metrics-driven marketing empowers sales to solve customer problems and seize opportunities. Real-time insights inform decisions and advance customer satisfaction.



**SHORTEN THE SALES CYCLE** with streamlined processes, higher quality leads, and informed decision making.



**USE ONE SOURCE OF CUSTOMER DATA** to improve sales and support responsiveness.



“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 AT INTERNATIONAL PIPE & SUPPLY, LLC

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## 2 STREAMLINE PROCESSES TO SPUR INNOVATION

Tedious searches and data entry thwart progress but Acumatica ignites it by giving sales what it needs to succeed. Users can access leads, opportunities, quotes, orders, and all customer activity from any browser.



**INTEGRATED WORKFLOWS AND ALERTS** keep deadlines on track.

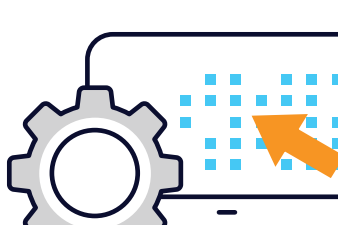


**REAL-TIME KPIS** track status and priorities.



## 3 INFORM DECISIONS TO DRIVE BUSINESS GOALS

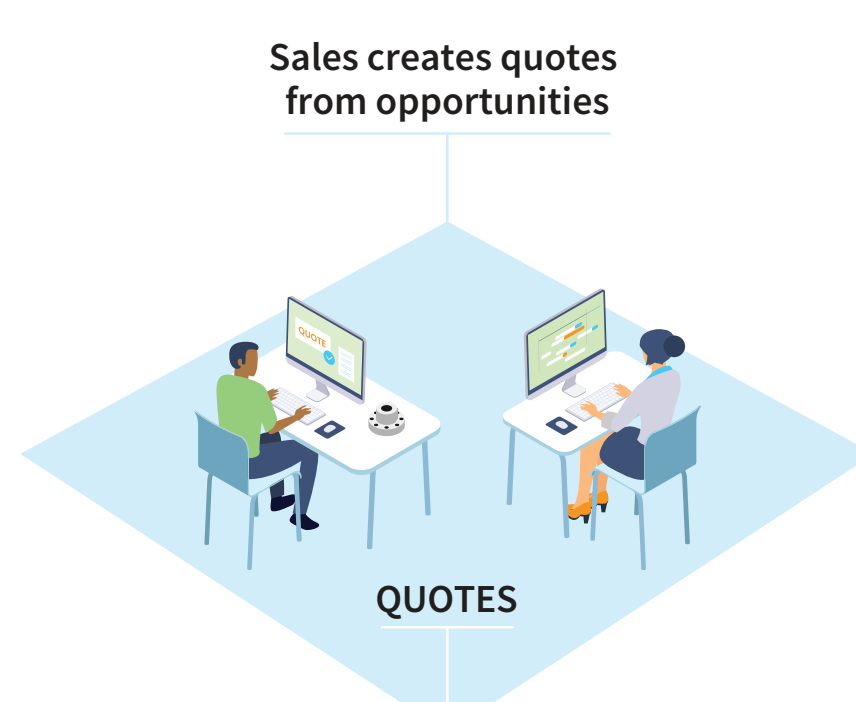
Real-time analytics inform decisions via dynamic charts and drill-down capabilities.



**PERSONALIZED DASHBOARDS** present mission-critical data and KPIs at-a-glance.



**STANDARD AND CUSTOM REPORTS** provide instant access to pipeline status and closure probability.



## 4 INCREASE CUSTOMER SATISFACTION

Acumatica case management addresses customer issues immediately, automatically assigning tasks complete with customer history. CRM tracks case history, moves projects along to completion, and alerts employees of tasks.



**ON-THE-GO MOBILITY** lets staff respond to customer needs, anytime, anywhere.



**SELF-SERVICE PORTAL** helps clients find answers fast.



## 5 MAXIMIZE VALUE, LOWER IT COSTS

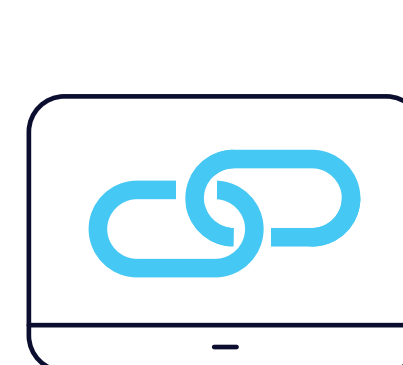
Acumatica embeds CRM in its core ERP to offer two mission-critical applications for the price of one.



**UNLIMITED USER LICENSES**



**FREE ONLINE TRAINING**



**ERP AND EMBEDDED CRM**

“We searched for a provider that was built for the cloud and selected Acumatica TRUE Cloud ERP. Now we can be seamless by using CRM and the Mobile App. All departments in Security Solutions—sales, retail, service, inspections, testing—have instant access to information, which helps speed business and lets us focus on what we do best.”

JAMIE VOS, OWNER/GENERAL MANAGER OF SECURITY SOLUTIONS

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## SUMMARY GAIN EFFICIENCY AND ADVANCE REVENUE GOALS

Acumatica promotes growth by streamlining marketing, sales, and support and presenting one source of organizational truth. Productivity soars as employees focus on strategic and customer-facing work while real-time dashboards keep KPIs on track.



“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. Now, with Acumatica, the entire department can see the support ticket. All technicians and support agents have the visibility needed to make sure customer issues aren’t getting lost. Our team is much more efficient.”

JAMIE VOS, OWNER/GENERAL MANAGER OF SECURITY SOLUTIONS

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### ABOUT ACUMATICA

Acumatica Cloud ERP provides the best business management solution for digitally resilient companies. Built for mobile and telework scenarios and easily integrated with the collaboration tools of your choice, Acumatica delivers flexibility, efficiency, and continuity of operations to growing small and midmarket organizations.

**Business Resilience. Delivered.**

Learn more about how Acumatica can work in your business.  
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