Are you taking too long to turn opportunities into revenue?

Connect Acccess CRM to Dimensions for faster quote-to-cash

When your financial management system and customer relationship management (CRM) software don't integrate smoothly, your Sales and Finance teams don't share a single view of customer interactions. As a result, disjointed processes and information silos make gaining customers insights difficult.

Without a CRM that works in sync with Access Dimensions, you'll struggle to:

- Connect data between your CRM and Dimensions for detailed reporting
- Efficiently generate revenue by automating the conversion of quotes to sales orders
- Bill accurately and on time because sales recorded in your CRM don't pull through to your sales ledger
- Alert your account managers when customers miss payments and are put 'on stop'

Our Clients

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Access CRM integrates with Access Dimensions to provide the following benefits:

Fast quote-to-cash: At the click of a button, generate sales orders from quotes within Access CRM. There's no need to create new accounts and manually enter order details in Dimensions.

Accurate sales forecasts: Get a real-time view of your sales pipeline to know whether you're on track to meet your targets. Drill down to compare different product lines, and see why some products are performing especially well.

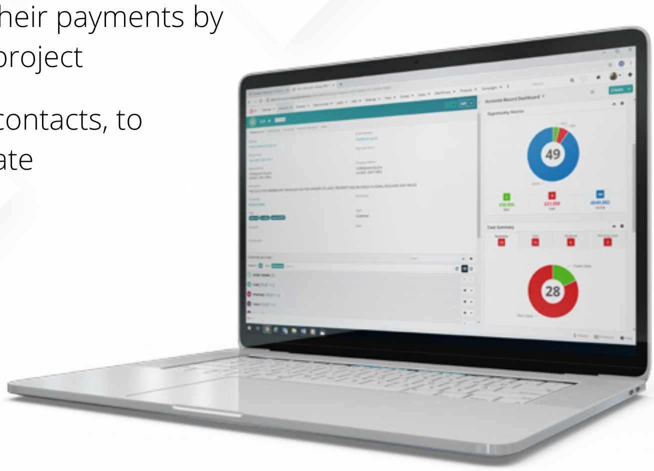
In-depth customer insights: Salespeople have a complete history of customers' purchases to spot up-sell and cross-sell opportunities. You can also display information on an account's balance and aged debt within your CRM. This will keep conversations with customers informed and productive.

Fewer finance enquiries: Account managers can self-serve information they would otherwise have to get from Finance. For example, a list of customers who have missed payments. As a result, Finance has minimal involvement with customer issues, including payment disputes.

Do you use Access FocalPoint to manage your projects?

Access CRM also connects to Access FocalPoint, our project and procurement management system, to reduce the administrative burden on Finance. By giving your customer-facing employees a central place to view information, they can:

- Forecast the cost of a project with a view of the amount spent on similar work
- Work efficiently by setting up new FocalPoint projects from within Access CRM
- Stop costs overrunning by viewing summary-level budget information within Access CRM
- Understand where a project is likely to go over budget with access to a variance analysis
- See how profitable a project is by comparing billing opportunities with resources used
- Know if a customer is up to date with their payments by viewing transactions posted against a project
- Share information, such as notes and contacts, to keep everyone connected and up to date



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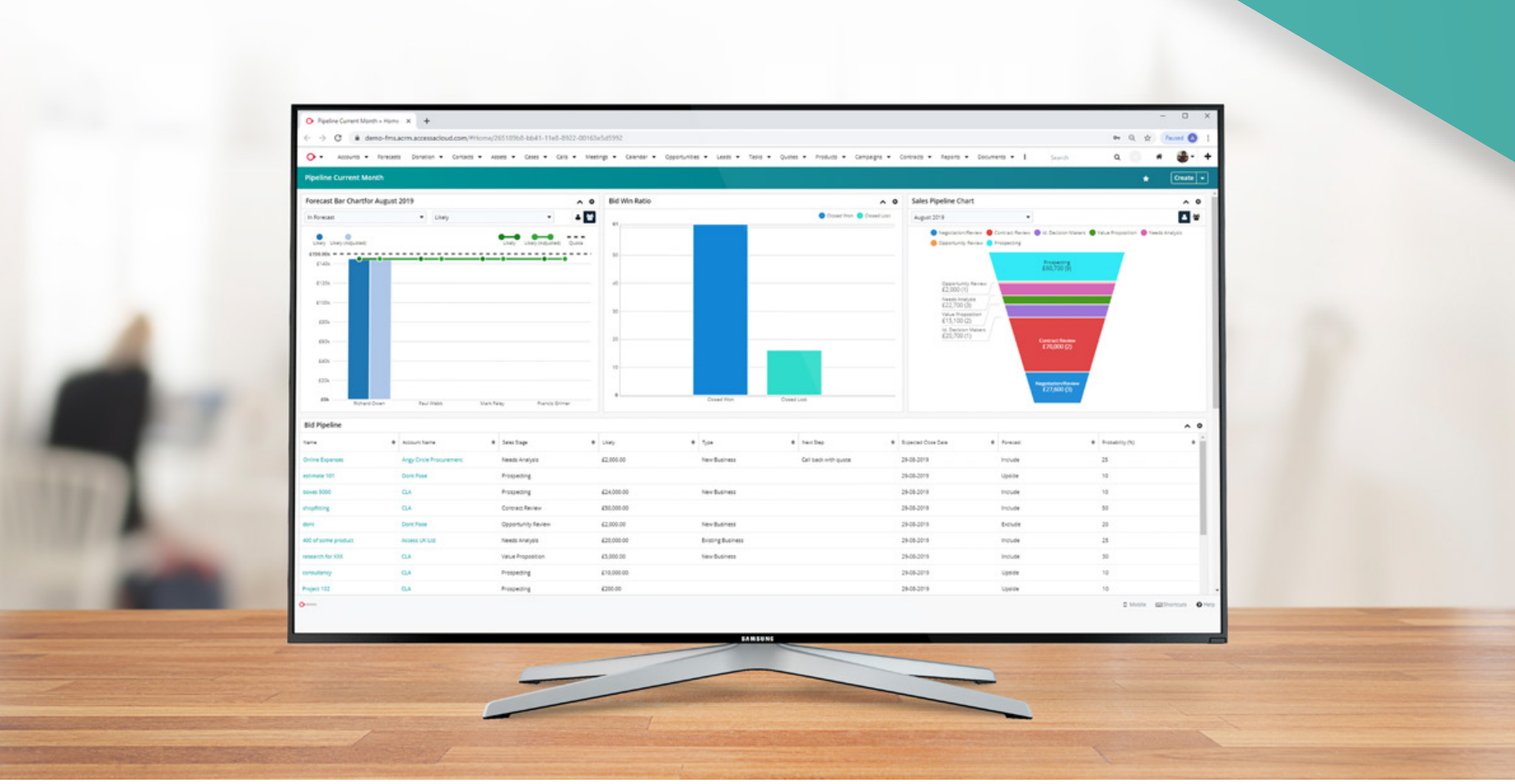

Extend your investment: Access CRM integrates with Access Dimensions and FocalPoint for complete workflow management

Accelerate critical processes: Deals flow through your system, from opportunity stage to receipt of payment, with no need for data re-entry

Instantly view your pipeline: Accurately forecast growth and visualise progress towards KPIs

Build customer loyalty: Understand customers' purchasing habits, needs and issues with an overview of all interactions

Access CRM works with Dimensions and FocalPoint

Connect your front and back office processes. By removing information silos, customer-facing staff can self-serve information to personalise interactions.

For Finance, a single source of data lets you compile reports and measure performance. No more feeling pressured by employees desperate for customer insights. Now, you're free to pursue your goals with instant access to the data you need.

For further information about Access CRM

CONTACT US