access CRM

Combine the ease of cloud-based CRM with the power of your existing Access software

Take one cloud-hosted CRM platform boasting advanced sales, support, marketing and collaboration features. Add in ease of use – a key feature of the Access experience – and you'll see why our customers love using Access CRM.

Access CRM empowers your sales, marketing and support staff to own and manage their pipeline, determine which marketing campaigns generate the best ROI, and put the customer back into CRM. The platform is intuitive and easy to use so staff will be able to start using it straight away. Best of all, Access CRM integrates easily with your existing Access software.

Hassle-free integration with your Access software

The beauty of Access CRM is that it is designed to integrate 'out of the box' with your existing Access software. This means none of the hassle or cost typically associated with integrating one system with another.
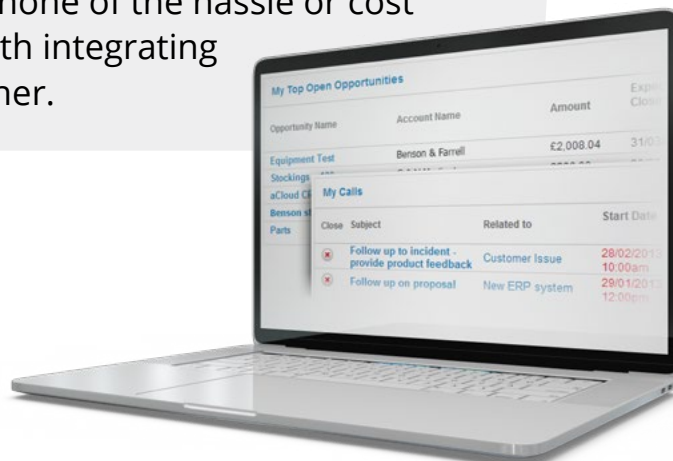
Key benefits

Easy integration with Access Dimensions

Access CRM is an extension of your sales ledger, product and sales order processing software so that all customer-facing departments can see every aspect of customer interaction in one place.
You get full visibility of customer summaries, from order history and credit limits to customers on stop.

Empower your customer-facing staff

Give your sales, marketing and support teams the full 360 view of customer interactions, wherever they happen to be. Access CRM means that customer data is no longer held in silos and delivers a constant source of real-time information.

CRM anytime, anywhere

Access CRM is fully compatible with tablet, iOS and Android devices. Send customer quotes via email straight from Access CRM, connect to social media feeds directly from the CRM environment, and plan & implement marketing campaigns.

CRM for marketing

Close the loop – for good. Access CRM shows ROI in terms of leads, pipeline and revenue, giving marketeers crystal-clear evidence of which activities impact the bottom line. Inbuilt automation, campaign management and email marketing complete the toolkit, providing easy analysis of open rates, click throughs, bounce backs and more.

CRM for sales

Get a true birds-eye view on your accounts, contacts and opportunities. Manage territories, teams, pipeline and forecasts. Access CRM links seamlessly to your Access Dimensions finance system, allowing one click order conversion, inbuilt quotations and drilldown to your entire product catalogue.

CRM for service

Access CRM creates a two-way relationship between service agents and customers, allowing effective engagement and cost-effective issue resolution. Easily assign and track customer feedback, track bugs over their lifecycle and give customers the answers they want, when they want them through self-service.

Top features

Key features that make Access CRM the best choice for your company:

Integration with your product catalogue: Access CRM includes extensive integration to the stock information held in your finance system. Simply drill down for detailed product data without leaving the CRM environment.

- Quote in multi-currency
- Validity periods
- View quantities, product descriptions & pricing

- Optional signoff / approval workflow
- Central quote history/library

Role and Team-based CRM: Access CRM knows exactly who you are, delivering a personalised user experience every time you log in.

- Pre-defined home page, supporting different roles for ease of use
- Dashboards straight-from the box including: sales pipeline, lead source, monthly pipeline by outcome, opportunities by lead source

- My Favourites allow easy monitoring of relevant accounts, contacts, opportunities or other CRM records that are important to track

Social CRM: Access CRM includes pre-built integrations to the most popular collaboration and social media applications. From Twitter, LinkedIn and Facebook connectivity to more advanced features such as GoToMeeting and Webex integrations.

Intuitive pipeline management: From quote to close, managing your pipeline is easy and intuitive using a range of inbuilt tools.

- Track multiple quotes against opportunities
- Manage your sales process, pipeline and forecast

- Add favourites and monitor in real time

Closed-loop reporting: Don't just look at leads, look at the bottom line. Access CRM allows teams to become truly effective by showing which activities add business value. For example, the success of a campaign can be measured by the amount of pipeline revenue an activity has generated, rather than simply how many leads.

Integration with Outlook email: MS Outlook is still the correspondence tool of choice for business, so Access CRM offers tight integration for convenience and ease of use.

- Track and share email communications in Access CRM
- Create CRM contacts, opportunities, leads and cases directly from email messages

- Build up a complete view of the correspondence with your customers and prospects to improve the customer experience

Which level of Access CRM is right for my company?

Product tiers at a glance:

Professional
Entry level Account, Contact, Opportunity and Activity Management, Microsoft Office and Access integration

Corporate
Professional level plus Product Catalogue, Quote and Forecast, Multi-Currency, Marketing Campaigns, Case Management, Social Media, Mobile Applications

Enterprise
Corporate level plus Project and Contract Management, Cloud Connectors and API, Multi-Language, Newsletters, Advanced Workflow and Customer self-service

Take control of your customer and prospect data

Access CRM empowers your sales, marketing and support staff to own and manage their pipeline, determine which marketing campaigns generate the best ROI, and put the customer back into CRM.

Intuitive and easy to use, staff can start using Access CRM straight away. Best of all, Access CRM integrates easily with your existing Access software.

For further information about Access CRM