

# Quick Comparison Guide to CRM Systems



## Acumatica CRM



## Dynamics CRM

(Now Dynamics 365 for Sales)

### Deployment Options



### Mobile Access

Can be accessed via browser  
iOS and Android apps:  
Frequently updated  
Modern  
Offers access to the entire system

Can be accessed via browser  
iOS and Android apps:  
Unreliable  
Not user friendly  
Source of customer complaints

### Licensing



Your price is based on:



Charges per user



The applications you need

### ERP Integration



Native, no additional software to buy.

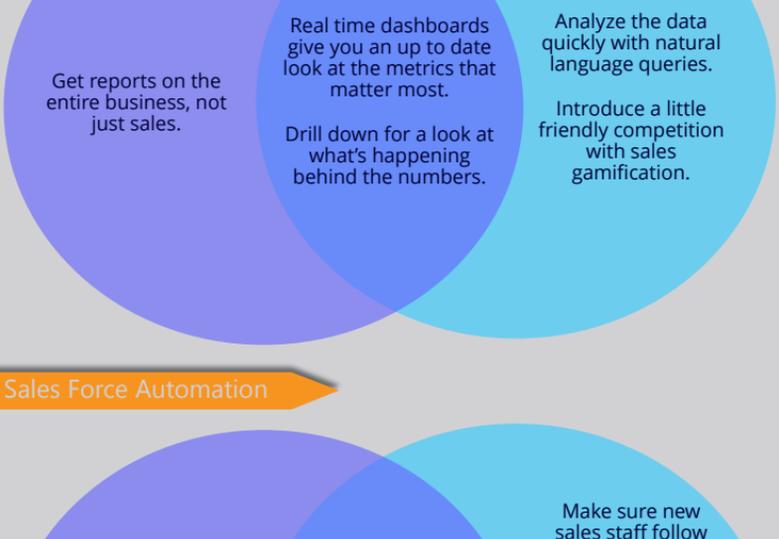


Native for Dynamics 365

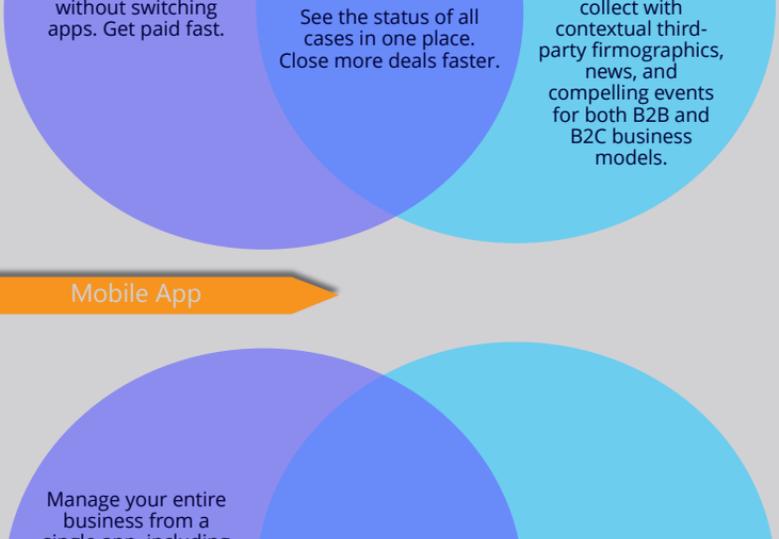
Otherwise integrations are needed

## Feature Comparison

### Reporting and Dashboards



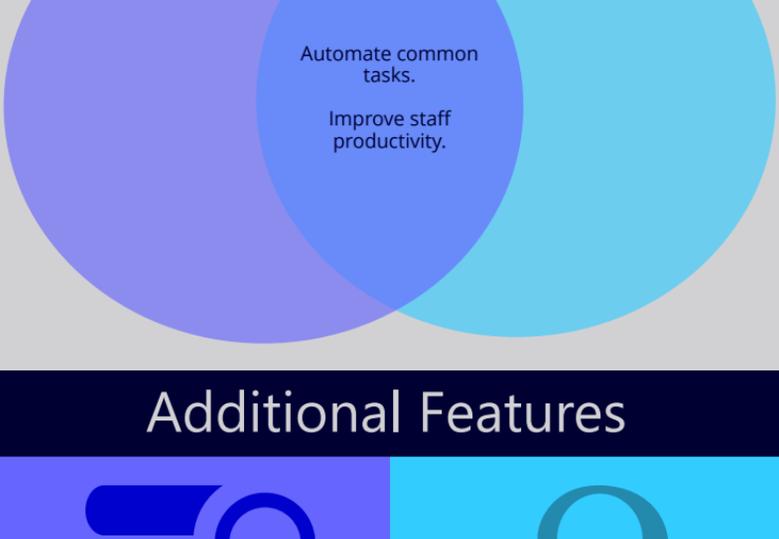
### Sales Force Automation



### Mobile App



### Workflows



## Additional Features

- Manage your entire database. No more duplicate data entry or wondering if info is up to date.
- Create landing pages to capture leads from your website, Google ads, direct mail and more.
- Use email templates to send professional-looking emails that are consistent with brand guidelines.
- Better target leads. Segment lists based upon the attributes you choose.
- Case severity options, escalation paths, priorities, and reminders help improve customer service.
- Give support personnel the ability to self-assign a case, speeding up time to resolve issues and answer questions.
- Link service and support automation to customer contracts.
- Make it easy for service agents to determine the proper level of service.
- Set service rates by the contract, incident, or hourly rate. Even give customers the option to prepay for service.

- Embedded intelligence and contextual recommendations help you build stronger, more profitable relationships.
- Get suggestions for relevant content based on what you're working on and who you're working with.
- Quickly create personalized sales documents with Office 365. (Requires separate subscription).
- Social intelligence and social sentiment
- Quota and territory management

### Conclusion

Both Acumatica and Dynamics 365 for Sales have what it takes to help you empower your sales team and manage customer relationships. But, Acumatica takes it a step further and gives you the power to manage your entire business with a single cost effective easy to use system.

**Demand more from your CRM. Get more with Acumatica.**

### Sources

- <https://dynamics.microsoft.com/en-us/sales/capabilities/>
- <https://www.acumatica.com/cloud-erp-software/customer-management/>
- <https://www.acumatica.com/blog/smb-group-crm-study-helping-smb-s-keep-pace-with-customers/>
- <https://www.acumatica.com/blog/acumatica-2017-r2-productivity-enhancements-crm-marketing/>
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