Overview of CRM & Sales

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The Customer Relationship Management (CRM) and Sales portion of the system includes modules for managing business relationships and sales opportunities. Here you work with your customers (clients), vendors, and other organizations, as well as the people associated with those entities. You can track sales leads and manage account relationships, as well as measure the effectiveness of marketing campaigns. For an example of how these features can help your team, read our feature highlight (https://www.aacesoft.com/resources/easily-manage-complex-business-relationships-in-aace).

Companies

The Companies module stores records for the various organizations that your company does business with. Each record contains address and billing information associated with the company or organization. Users also have direct access to related data such as contacts, sales, marketing and other pertinent information. Access is controlled by the user's system privileges and data rights.

Contacts

The Contacts module stores records of people. Contacts can be associated with one or more Company records, but it is not required. Each record contains the phone, email, SMS, and other contact information. Like all records in aACE, links to other pertinent information is available directly from this module.

Leads

The Leads module manages the sales life cycle from beginning to end. Sales executives can track the dollar value and the likelihood of closure for each lead at every stage. This gives management an estimated value of the incoming sales pipeline weighted by the quality of each opportunity.

The Leads module also links to the estimates that are associated with leads (i.e. pending orders). Sales executives can create estimates using the system's product and billing infrastructure. Then, when a lead is marked as "WON", the estimate becomes the basis for the order and fulfillment, and order management can begin immediately.

Sales executives can also assign tasks and schedule reminders to ensure that no one misses an important date. Each task they enter creates a record in the Tasks module where management can review all workloads at a very comprehensive level.

Campaigns

The Campaigns module stores information about the marketing and sales campaigns you run, accumulating data from Leads and Orders. Performance information is displayed in graphs, not just in numbers.

Lists

The Lists module is where users manage their lists. These lists will most likely be used for contacts and companies (for example, Holiday Card List or Top Client List), but they can be used for just about anything and link to any record in the system. Users have the ability to mark their lists as public or private and this module also integrates with VerticalResponse. Say you have a list that keeps track of customers who have expressed interest in books on food; you can also attach all the books you sell related to food to the list, and when you get a new book in, you can easily send a newsletter to all interested customers.

Emails

If you have [integration with Mailgun](http://aace5.knowledgeowl.com/help/configuring-mailgun) (http://aace5.knowledgeowl.com/help/configuring-mailgun), you can use advanced email features:

You can “bcc the system” the way you might bcc an assistant on an email chain. Doing this sends a copy of the email to aACE, where it is automatically attached to the relevant records. (For example, if aACE finds a Contact record with a matching email address, it links the email to that contact. If it finds reference to "[INV87234]" anywhere in the email, it links the email to Invoice #87234.)

You can also forward emails you receive directly to aACE.