Accessing CRM & Sales Modules

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This guide provides an overview of the CRM & Sales modules. It is intended for general users.

The Customer Relationship Management (CRM) and Sales portion of the system includes modules for managing business relationships and sales opportunities. These modules allow you to:

- Work with your customers (clients), vendors, and other organizations, as well as the people associated with those entities
- Track sales leads
- Manage account relationships
- 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 this is not required. Each record contains contact information, such as a phone number, email, SMS, etc. Like all records in aACE, links to other pertinent information are 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 provides links to the estimates (i.e. pending orders) that are associated with each lead. Sales executives can create estimates using the system's product and billing infrastructure. When a lead is marked as "WON", the currently flagged estimate becomes the basis for the order and fulfillment. 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 comprehensive level.

Campaigns

The Campaigns module stores information about the marketing and sales campaigns you run, accumulating performance data from Leads and Orders.

Lists

The Lists module is where you can manage lists related to contacts and companies (for example, Holiday Card List or Top Client List). Lists can be used for other purpose and can link to any record in the system. You can mark lists as public or private. This module also integrates with VerticalResponse.

For example, a bookseller might keep a list to track of customers who expressed interest in books on food. They could attach all the books related to food to that list. When a new food-related book arrived, they could easily send a newsletter to all interested customers.

Emails

aACE provides helpful email features to assist your team members with communication. If you have integration with Mailgun (http://aace6.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 a record code, such as "[INV87234]" anywhere in the email, it links the email to Invoice #87234.)

- You can also forward emails you receive directly to aACE for keeping communication about an issue linked to the relevant business records.

Additional information about Email capabilities and automations can be found here (https://aace6.knowledgeowl.com/help/email).