

Microsoft Teams Integration

Send text messages, call, and share files with colleagues without leaving Acumatica. The Microsoft Teams Integration makes the world's leading collaboration software accessible from inside Acumatica.

- **Expedite communication without leaving Acumatica**
- **Improve workflows and collaboration across your company and externally with customers, vendors, and partners**
- **Connect Acumatica business events and records to Microsoft Teams chats, channels, and meeting files**

Key business benefits

- Enable employees to get answers faster via Microsoft Teams.
- Notify users of critical status and events with automated alerts.
- Import files from Teams directly into the relevant Acumatica record.
- Enable users to reach colleagues via chat, call, or a meeting.
- Allow users to choose their preferred communication method.
- Share documents and links to corresponding Acumatica records.

Related resources

- ERP Usability Checklist > [LEARN MORE](#)
- Boost Employee Engagement and Profitability > [LEARN MORE](#)
- Schedule a Personalized Demo > [LEARN MORE](#)

Fuel Productivity and Collaboration with Native Microsoft Teams Integration

Acumatica's Microsoft Teams Integration makes the world's leading collaboration software accessible directly from inside Acumatica. Now users can chat, call, share files, and meet with internal and external contacts without leaving Acumatica. Ask and answer questions on the fly. Submit and approve requests. Keep groups and individuals up to date with the latest information, all without leaving Acumatica.

STREAMLINE TASKS WITH SEAMLESS INTEGRATION

Get work done faster and easier with Acumatica's native Microsoft Teams integration.

- Select the contact or channel you want to interact with directly from Acumatica Leads, Contacts, Case, and Business Event screens.
- Easily share time-sensitive documents, like invoices, with a contact or a group.
- Streamline workflows and approvals while automatically creating an audit trail.
- Alert contacts when business events trigger notifications from Acumatica to MS Teams channels and contacts.

IMPROVE EMPLOYEE AND PARTNER COMMUNICATION

- Empower employees and partners to resolve issues and complete tasks rapidly.
- Identify real-time status information of each contact from Acumatica screens.
- Choose your preferred contact method, including chat, audio call, or meeting.
- Put priority documents in front of contacts or groups by uploading files to Teams.
- Verify that contacts received messages and documents immediately.
- Monitor activity and responses to crucial tasks and communications.

"It's a blessing that we were an early adopter of Microsoft Teams so there wasn't a learning curve with a lot of the technology that other companies had to figure out."

—Ethan Platt, President & Co-Owner, American Meadows

> CUSTOMER STORIES

Intuitive, Bi-Synchronous Collaboration

Start a Teams message or call to internal colleagues and external partners from Acumatica's Cases, Business Events, Contacts, Leads, and Opportunity Screens by selecting the contact's name and clicking on the chat, message, or meeting icon.

Communication Audit Trails

Access and maintain full audit trails of each message, chat, and meeting.

Automated Alerts

Automatically alert designated contacts or groups in Teams when specific business events occur in Acumatica, such as a payment, approval request, promising lead, or change in case ownership.

Record Sharing

Share an Acumatica record with select contacts or Teams groups by adding a link to a Teams message and automatically notifying recipients.

Document Import

Upload documents directly from Teams by opening the files in a message, meeting, or group. Select the Teams button in Acumatica to find and import the file.

Activity Creation

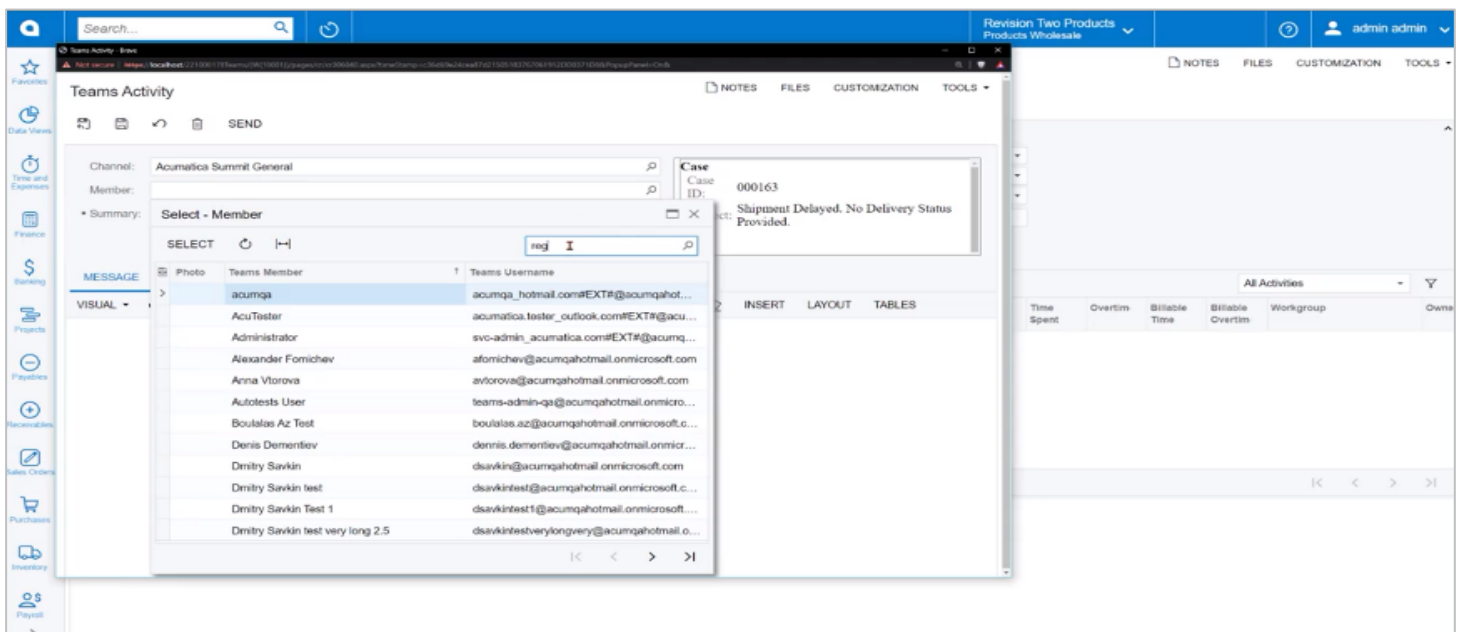
Create an activity to share essential information, such as a customer request, with specific groups or channels and automatically post it to Teams and notify members.

Contact Management

Maintain Teams contacts' names, profile pictures, and contact information for internal colleagues and external partners in the Acumatica interface.

At-a-Glance Status Information

View real-time availability of all internal contacts within Acumatica by clicking on each person's name from the contacts list.



Collaborate with internal employees and external customers, vendors, and partners via Microsoft Teams directly from Acumatica.

ABOUT ACUMATICA

Acumatica Cloud ERP provides the best business management solution for digitally resilient companies. Built for mobile and telework scenarios and easily integrated with the collaboration tools of your choice, Acumatica delivers flexibility, efficiency, and continuity of operations to growing small and midmarket organizations.

Business Resilience. Delivered.

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ABOUT DSD BUSINESS SYSTEMS

Founded in 1984 in San Diego, DSD Business Systems is an award-winning cloud accounting, ERP, CRM, HR and custom development technology partner with 45 offices throughout North America. As a Gold Acumatica Partner, DSD is recognized annually by Accounting Technology Magazine as a Technology Pacesetter, as well as a Top 100 VAR Firm by both Bob Scott's Insights and Accounting Today.

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