

# Epicor Customer Relationship Management



## Product

- ▶ Epicor® ERP

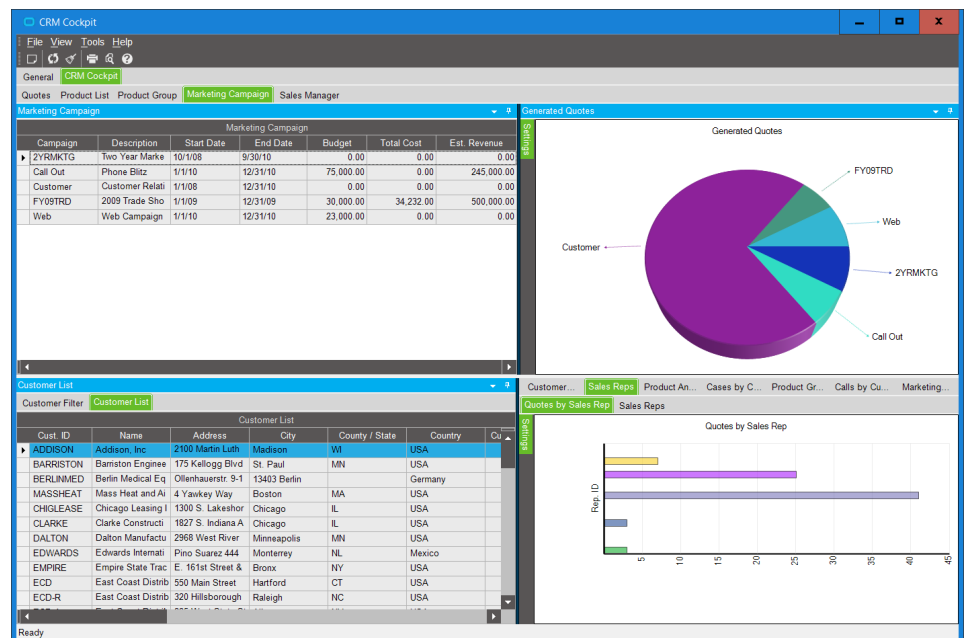
## Benefits

- ▶ Reach new customers
- ▶ Increase customer retention
- ▶ Automate and track marketing activities
- ▶ Deliver personalized customer experiences
- ▶ Support your mobile sales force
- ▶ Integrate with Salesforce.com®

## Grow your customer-centric strategies with next-generation technology

Keeping your customers at the center of your business means responding to their requests in a fast and efficient way. Your customers are used to getting what they want when they want it, so you need to leverage the latest technology to meet their increasing demands.

Epicor Customer Relationship Management (CRM) is a modern platform that provides a 360-degree view of the entire customer, supplier, or partner relationship. Control every aspect of your company's interaction with customers and prospects—from generating the lead, to developing the opportunity, taking the order, producing and shipping or supplying the goods or services, receiving the payment, and supporting the customer.



Easily manage leads and opportunities for accurate sales forecasting and pipeline analysis.

## Features

### Contact Management

Manage contact information for your customers, suppliers, and vendors and access it from any device. Track interactions in real time so that every employee has complete information when communicating with customers and partners.

### Lead and Opportunity Management

Proactively manage your sales territories and the entire life cycle of all your opportunities. Lead and Opportunity Management enables you to convert more prospects to customers, target the highest value opportunities, and increase sales revenues.

### Case Management

From initial call to resolution and follow-up, Case Management is a customer-focused solution for personalized, high-quality service. It enables your service team to manage case load, respond quickly to customers, and achieve outstanding customer satisfaction.

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## Marketing Management

With Epicor eMarketing, effectively distribute important communications to your employees, partners, prospects, and customers. Manage the entire campaign cycle through a highly flexible, easy-to-use web user interface that integrates with Epicor CRM. You can import contacts, create targeted emails, and measure the success of your campaigns.

## Mobile CRM

Empower your sales force by providing them with access to the entire CRM suite from any iOS® or Android® device. Through our next-generation mobile application, you can manage leads, customers, and contacts, as well as quotes—from opportunity to order shipment. Create activity-based

workflows like call/email logging, notes, “To Do” lists, and appointments, and implement your back-office task workflow. Access data related to competitors, cases, projects, and order history—even without Internet connectivity. Also, visualize your customers and prospects on a map while in the area, and then get travel time and directions to the selected location.

Never miss a sales opportunity again. With Mobile CRM, you can search your inventory to verify product availability, create sales orders—even from opportunities—and ship them to your customers—all from your mobile device.

## Customer Connect

The Customer Connect portal—powered by Epicor Commerce Connect—provides interactive, customer-facing content over the

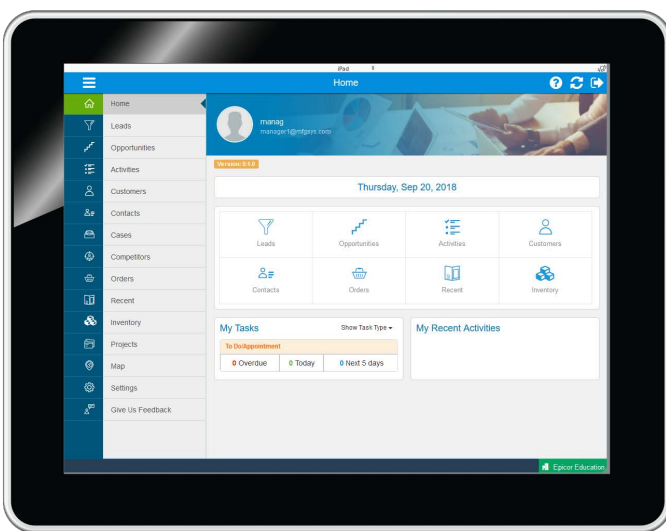
web. It is an optional module based on the Magento platform and is fully integrated with Epicor ERP. Deliver a modern eCommerce experience while meeting the unique needs of business buyers with features that include special promotions, price lists, repeat purchases, and the ability to pay on account.

## Integration with Microsoft Office

Add the optional module Epicor Information Worker to enhance the effectiveness of your sales force by synchronizing essential Epicor CRM data with Microsoft® Office®—giving your sales force full access to prospect and customer information like sales history within Microsoft Outlook®, Microsoft Excel®, or Microsoft Word®.

## Integration with Salesforce.com

Ensure that your contact management system and your Epicor ERP CRM solutions are in sync. Create and manage customer records, contacts, and Epicor parts—either bi-directionally in the Epicor CRM module or in Salesforce.com software. When any of these records are altered in either tool, it automatically synchronizes—saving you time and minimizing potential manual data entry inconsistencies between the two tools. This optional module offers a true integration, as it is part of Epicor ERP and does not rely on middleware or additional tools.



*With Epicor Mobile CRM, manage the sales cycle from opportunity to order shipment—anytime, anywhere.*

## About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software designed to fit the precise needs of our manufacturing, distribution, retail, and service industry customers. More than 45 years of experience with our customers' unique business processes and operational requirements are built into every solution—in the cloud or on premises. With this deep understanding of your industry, Epicor solutions dramatically improve performance and profitability while easing complexity so you can focus on growth. For more information, [connect with Epicor](#) or visit [www.epicor.com](http://www.epicor.com).

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