

Epicor Customer Relationship Management



Product

- ▶ Epicor® ERP

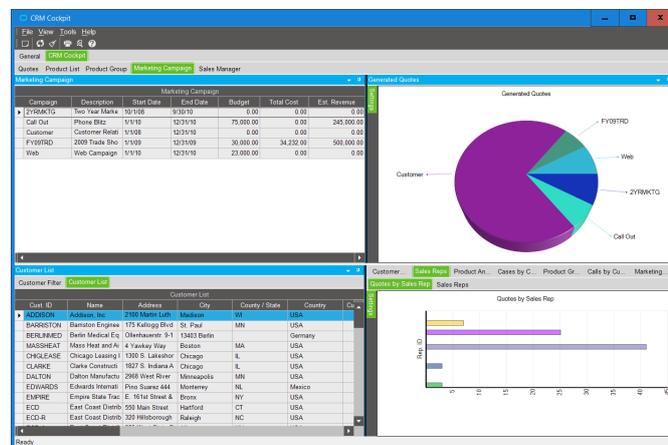
Benefits

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

Grow your customer-centric strategies with next-generation technology

Keeping your customers at the center of your business today means that you need to be able to respond to their requests in a fast and efficient way. Leveraging the latest technology is key to meeting their 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, developing the opportunity, taking the order, producing and shipping or supplying the goods or services, getting the cash, 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.

Marketing Management

Targeted communication can be your most powerful competitive weapon. Marketing Management enables you to measure the success of marketing campaigns, understand your target market, improve communications, and build customer and prospect relationships.

Mobile CRM

Empower your salesforce by providing them access to the entire CRM suite capabilities 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. 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. In addition, you can access back-office dashboards and forms as needed to complete more complex tasks.

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.

Campaign Connect

Manage the entire campaign cycle—from identifying and importing contacts, to creating targeted e-mails and corresponding Web landing pages. It delivers thorough

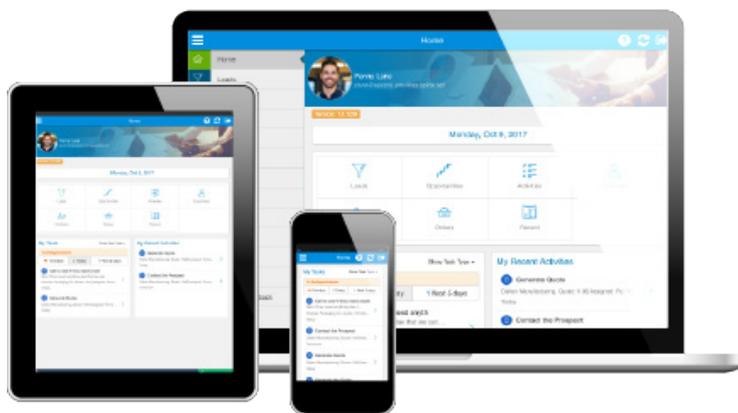
reporting and analysis tools to help you build more targeted campaigns and its user-friendly experience enables you to quickly and easily implement focused communications and campaigns with minimal training.

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, including 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 lead to quote—anytime, anywhere

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, [connect with Epicor](#) or visit www.epicor.com.

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