Epicor® Enterprise
Resource Planning
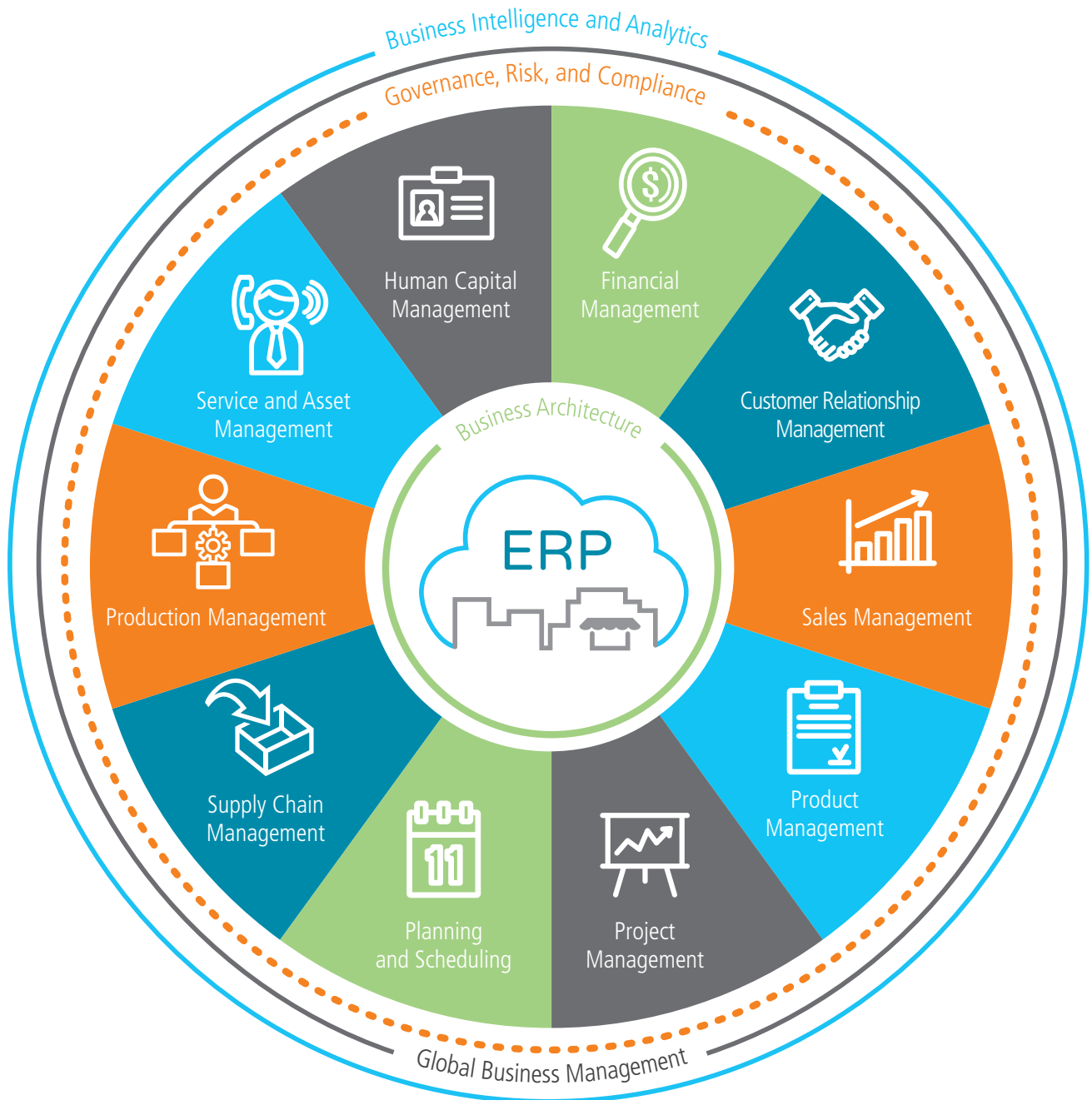
Customer Relationship Management

EPICOR.

Epicor ERP Diagram

Business Intelligence and Analytics

Governance, Risk, and Compliance

Human Capital Management

Financial Management

Service and Asset Management

Customer Relationship Management

Business Architecture

ERP

Production Management

Sales Management

Supply Chain Management

Product Management

Planning and Scheduling

Project Management

Global Business Management

Customer Relationship Management

- Contact management
- Customer Connect
- Marketing Management
- Lead and Opportunity Management
- Case Management
- Mobile CRM
- Epicor ERP Integration to Salesforce.com®

Customer relationship management (CRM) strategies are as important to businesses today as they have ever been. We've designed Epicor CRM to help you stay ahead of the curve and successfully meet the challenges that the market brings—helping you to effectively manage your entire customer life cycle, improve operational efficiency, and accelerate growth both internally and externally.

CRM can control every aspect of a company's interaction with its customers and prospects including generating the lead, developing the opportunity, taking the order, producing and shipping or supplying the goods or services, payment, and ongoing support of the customer. Epicor CRM provides a 360-degree view of the complete customer, supplier, or partner relationship. Epicor CRM broadens the scope of customer information to everyone within and across the organization and to stakeholders beyond.

Epicor Social Enterprise (ESE) further enhances Epicor CRM, delivering up-to-date contextual information to key stakeholders for the life of the customer relationship. Using ESE, customers, prospects, and partners can collaborate with internal information workers to target the high customer satisfaction.

Figure 1 *Contact Management—Manage every aspect of your relationships with contacts for a more complete picture of customer interactions and for enhanced customer satisfaction.*

Lead and Opportunity Management

Outfitting your sales team with advanced, easy-to-use software is not just smart; it can be a matter of survival. Epicor CRM is equipped with the lead and opportunity management tools your sales team needs to manage the complete prospect-to-customer lifecycle, give accurate revenue forecasts to management, and automate many administrative tasks. Lead and Opportunity Management with Epicor Information Worker also enhances the effectiveness of your sales force by synchronizing essential Epicor CRM data with Microsoft® Office, giving your sales force access to prospect and customer information, including sales history within Microsoft Outlook®, Microsoft Excel®, or Microsoft Word.

(See fig. 1.1)

Contact Management

Comprehensive contact management is at the core of any effective CRM solution and makes keeping in touch with your customers and prospects easy by promoting responsive, respectful, and proactive communications. Contact Management enhances your customer service by documenting and sharing customer communication with the entire organization and helps manage contact interactions through task management. With Epicor CRM Contact Management you can improve overall focus and responsiveness by putting your contacts at the center of your business.

(See fig. 1)

Customer Connect

Epicor Commerce Connect provides interactive customer facing content over the Web. Today's customer expects thorough access to information. Requirements such as being able to view special promotions and pricelists, make repeat purchases and pay on account are standards to improved customer loyalty and online commerce.
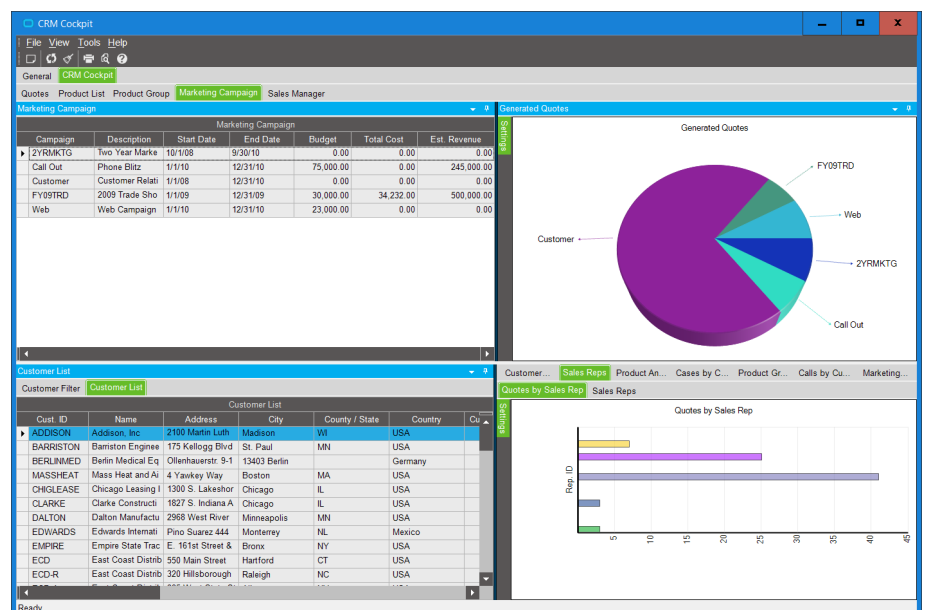
Marketing Management

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.

Figure 1.1 *Lead and Opportunity Management—Easily manage leads and opportunities for accurate sales forecasting and pipeline analysis.*

Case Management

Improving the productivity and responsiveness of your support center is an essential component of building industry leading customer satisfaction. From initial call to resolution and follow-up, Case Management provides a customer focused solution for personalized, high-quality service. This comprehensive one-stop solution comes equipped with time saving links to customer-focused activities (e.g., new quotes, orders, RMA requests, or service calls), plus a search-driven knowledgebase and case-driven workflow for standardizing case resolution. In addition, Case Management is integrated with Epicor Service Management's Field Service module for easy access to dispatching field activities, online answer books, existing customer field service calls, warranty information, and service contracts.

Mobile CRM

Keeping your customers at the focus of your business today means that you need to be able to respond to their requests in a fast and efficient way. To achieve this, it is crucial that you take advantage of the latest technologies by providing your salesforce with easy-to-use tools designed to increase productivity and improve employee engagement. Epicor Mobile CRM empowers your salesforce by providing mobile access to the entire CRM suite of capabilities on iOS™ and Android™ devices. 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 and email logging, notes, "to do" lists and appointments, and implement your back office task workflow. Access data related to competitors, cases, projects,
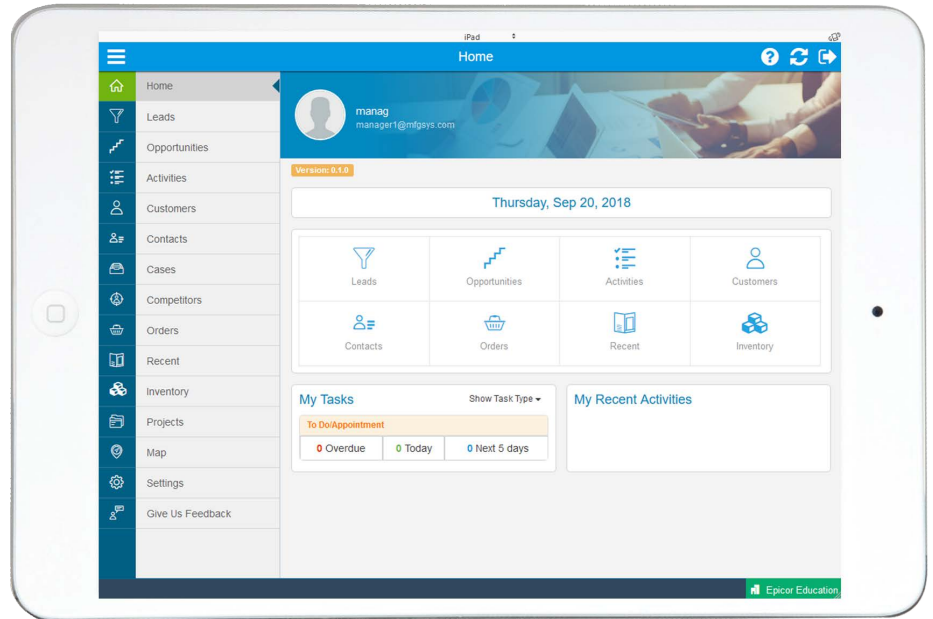

Figure 1.2 *Mobile CRM—With Epicor Mobile CRM manage the sales cycle from opportunity to order shipment—anytime, anywhere.*

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 finally ship them to your customers—all from your mobile device.

(See fig.1.2)

Epicor ERP Integration to Salesforce.com®

Ensure that your contact management system and your Epicor ERP CRM solution are in sync. This module directly integrates Epicor ERP to your Salesforce.com software and does not rely on a middleware or another tool. Create and manage customer records, contacts, and Epicor parts bi-directionally in either the CRM module in

Epicor ERP or in Salesforce.com software. Therefore, any time you alter any of these records in either system, it is designed to synchronize automatically, saving you time and preventing potential data entry inconsistencies. Flag a "won" opportunity in your Salesforce.com software and it can automatically create a quote in Epicor ERP. It will validate parts and alert you if any of the inventory items from the won opportunity are not loaded in Epicor ERP. You can then maintain the rest of the sales process in Epicor ERP, saving you time and helping ensuring accuracy between the opportunity and the quote.

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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.

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