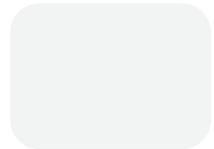# Customer Relationship Management

Business without Barriers

EPICOR®

Epicor provides a unique approach to CRM with embedded end-to-end processes to ensure a world-class customer experience.

Customer Relationship Management

- Contact Management
- Lead and Opportunity Management
- Case Management

- Marketing Management
- Mobile Connect

Financial Management

Supply Chain Management

Customer Relationship Management

Production Management

Sales Management

Enterprise Performance Management

Governance, Risk and Compliance

Planning and Scheduling

Human Capital Management

Product Data Management

Service Management

Business Architecture

Global Business Management

# Epicor Customer Relationship Management

Customer relationship management (CRM) strategies are as important to business 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 manage your entire customer lifecycle, from prospect to cash to care effectively, improve operational efficiency and accelerate growth—both internally and externally.

CRM controls every aspect of a company's interaction with its customers and potential customers 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. Epicor CRM provides a 360 degree view of the entire customer, supplier or partner relationship throughout the relationship lifecycle. Epicor CRM broadens the scope of customer information to everyone within and across the organization and to stakeholders beyond, through contextual delivery of essential customer data to information workers, wherever it's needed.

Modular in design, the Epicor CRM suite of modules includes Contact Management, Marketing Management, Campaign Connect, Lead and Opportunity Management, Case Management, Sales Connect and Mobile Connect. It can also be extended with Epicor Information Worker.

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 communication. 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 responsiveness and focus by putting your contacts at the center of your business.
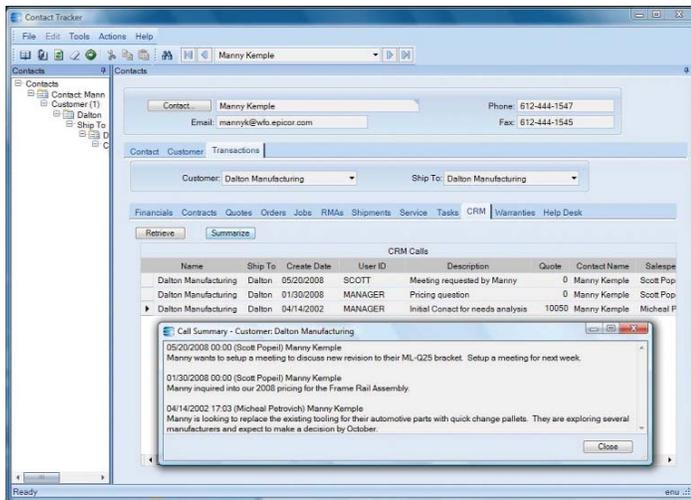
Manage every aspect of your relationships with contacts for a more complete picture of customer interactions and for enhanced customer satisfaction.

Contact Information
Store multiple contacts per organization by contact function. Track and report contact communication alongside entire organization activity.

Contact Name Field
Throughout Epicor CRM, the context menu for the Contact name field enables users to create a Customer or Service Call, Case, Lead/Opportunity/Quote, RMA, Sales Order, and Task. Users can also right click to send an e-mail directly to a contact; the e-mail program also lets attachments be added onto the e-mail.

Contact Related Information
Provides a visual indication that more data exists against a particular record or form behind calls, notes, comments, etc, the system will proactively let people know that more options exist. Typical data indictors would include icons (which link to the data) for events, holds, attachments and links.

Unlimited Call Notes
Share information across departments regarding customer inquiries by entering detailed call and communication notes. Easily incorporate electronic communication in call history.

Call History
Maintain detailed call history against contacts regarding new opportunities with prospects or existing relationships with customers and share with the entire organization. Additionally, link attachments to each call record using the Call Log.

Task Management
Easily generate follow-up tasks for key employees when communicating with individual contacts, customers or prospects. Provide each user their own task list that outlines their daily tasks.

Integration With E-Mail
E-mail customer or prospect contacts from within Epicor CRM, with e-mail details automatically stored as a call against the account.

Account Information
Extend contact details to capture, track and report on customers, prospects and suspects.

National Accounts
Create, manage, monitor and control national accounts hierarchies to further manage winning customer relationships, with either hierarchical or parent/child structures. A parent Customer Tracker then provides a consolidated view of customer data across multiple customers and the Site/Ship-to tracker is similar in format.

Contact Communication
Use standard editing tools like spell check and formatting to draft professional customer e-mail and letter communications. Use Microsoft standard cut-and-paste technology to easily manipulate text, and design e-mails using HTML or plain text formats based on the preferences of your audience.

Permission-Based Opt-Out Control
Manage requirements for effective permission communication through structured opt-out controls that are enabled on either a campaign basis or globally for contacts. Additionally, allow respondents to determine whether they receive text or HTML-based communications.

Epicor Information Worker
Epicor Information Worker synchronizes contacts, tasks and calendars between Epicor CRM and Microsoft Outlook.

Marketing Management

Seeking new, profitable customer relationships is challenging in today's borderless world. Targeting your customers with the right programs and messages and retaining those customers can be your most powerful competitive weapon. Epicor CRM Marketing Management enables you to measure the success of marketing campaigns, understand your target market and improve communications.

With Epicor CRM your marketers can pinpoint their targets, capture highly qualified leads and perform cost/benefit and return on investment (ROI) analysis on promotional activities. You can use the campaign manager to track the number of leads, opportunities, orders, and costs per campaign. And, once you have the lead, Epicor CRM helps manage the entire sales process more effectively, with features such as workflow and forecasting.
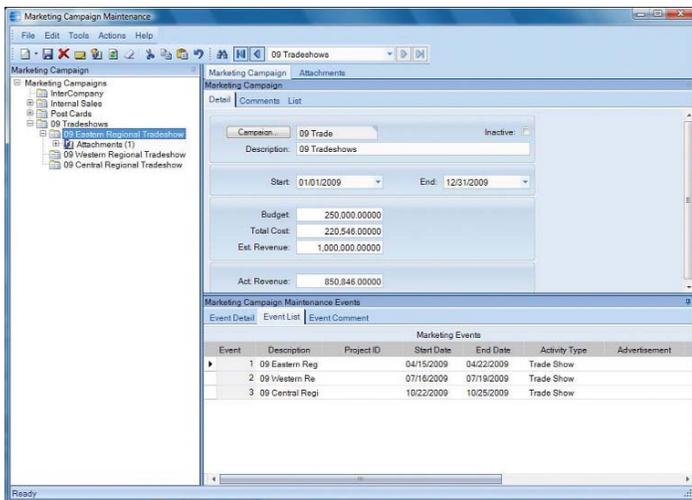
Establish, monitor and measure the entire marketing mix for a greater return on investment from marketing programs.

Campaign Management
Generate and manage a marketing campaign for tracking effectiveness and ROI of marketing programs or individual events.

Data Management
Extract marketing lists based on any criteria such as customer type (i.e., suspect, prospect, customer) and other attributes including standard industrial classification (SIC) code, location, contact type, territory, etc. Automatically create telemarketing or sales follow ups. Automatically log an entry for customers when they are included in a marketing list. Marketing list import allows customer and contact information to be imported from external sources. De-duping capabilities allow the management of imported lists and the tidying up of the marketing database.

Campaign Connect

Epicor CRM Campaign Connect is a comprehensive Web communication tool that helps you design and distribute e-mail communications to customers, suppliers, and business partners as well as to internal teams and departments. Whether developing a marketing campaign or creating a company statement to business partners, Campaign Connect ensures your company is professional, takes advantage of its e-mail marketing opportunities, properly responds to market requirements for opt-out controls, and analyzes e-mail communication results for better effectiveness in the future.

Campaign Connect makes marketing communication easy by managing the entire campaign cycle—from identifying and importing contacts, to creating targeted e-mails and a 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.

Campaign Creation
Rapidly build sophisticated, personalized messages and newsletters for all mass e-mail communications both internally and externally.

E-Mail Design (HTML or Text)
Design e-mail promotions in HTML or plain text formats based on the preferences of your audience.

Web Microsite Design
Build microsites to Web enable your campaigns, and then gather detailed campaign analysis by monitoring the footprint and click stream of your audience as they step through and link from the site.

Metrics Reporting
Review detailed metrics regarding a campaign, down to the segment or broadcast, including individual response preferences.

Contact Management
Upload and store all contacts in a single universe for easy access and management.

Import Wizard
Use a simple flat file import from a standard CSV or text file format for easy campaign generation. XML Web service and open database connectivity (ODBC) imports offer flexibility in data sources.

Permission-Based Opt-Out Control
Manage requirements for effective permission marketing through structured opt-out controls that are enabled on a campaign basis or globally. Additionally, allow respondents to determine whether they receive text or HTML-based communications.

Templates
Produce fast and easy campaigns with a consistent look using standard templates.

Segmentation
Utilize the power of your existing systems to generate more effective campaigns. By responding to previous purchases, requests or general demographics, you can generate targeted campaigns and optimize profits.

Web Design Tools
Create professional looking broadcasts with ease. From banner ads to your custom Campaign Connect home page, your company can utilize the power of Campaign Connect to Web-enable your users.

Lead and Opportunity Management

The primary goal of many businesses is to grow their revenue. Whether your growth will come through attracting new customers or retaining existing ones, Epicor CRM can help you. With Epicor CRM Lead and Opportunity Management you can 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.

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

Outfitting your sales team with advanced, easy-to-use software is not just smart; it's a matter of survival. Epicor CRM is equipped with the tools you need to find more prospects and quickly convert them to satisfied customers. Your sales people can manage the complete prospect-to-customer lifecycle, give accurate revenue forecasts to management and automate many administrative tasks. The bottom line? Better qualified prospects, shorter sales cycles, reduced lead time, and higher revenues.
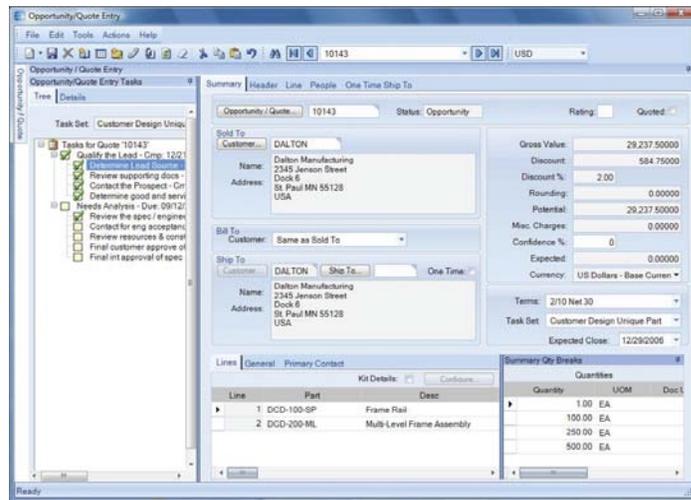
Take charge of each and every opportunity from initial contact through proposal and win.

Sales Team Management
Manage the sales team through a user-defined sales structure, pipeline management and quota management. Automate key sales management functions such as territory management and region assignment of individual prospects.

Sales Workbench
Give office-based sales representatives and management a single view of all customer- and prospect-related information. This view helps you manage your pipeline, marketing, telemarketing, opportunities, orders, returns, service orders, contracts, jobs, calls, and tasks, as well as see all related information on a customer—from one place. A work to-do list also ensures that the sales person is working on the right task at the right time.

Sales Workflow
Monitor every stage of the sales process, including parallel processes. Built-in workflow facilities ensure nothing is overlooked.

Lead Management
Manage incoming leads and assign to territory sales representatives. Track lead sources to identify successful advertising, events or other campaign tactics. Analyze return on investment of lead generation activities. Easily convert a lead into a quote/opportunity with Quote Management.
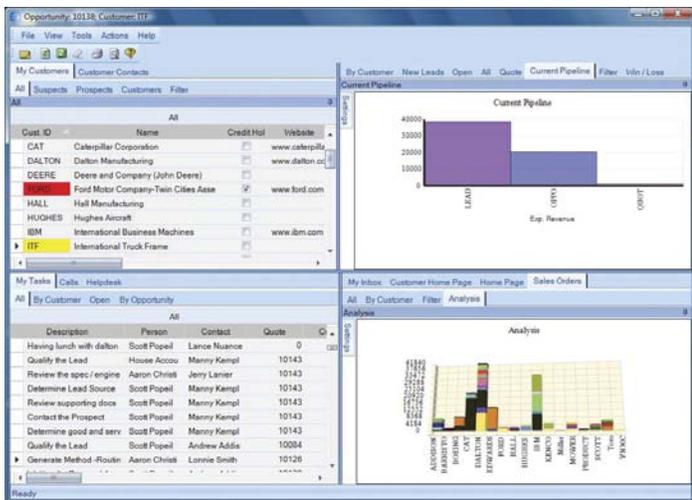
Opportunity Development
Improve sales efficiency with structured sales processes, freeing up sales staff from administrative tasks. From account executive to sales engineer, identify all roles within the sales process and establish an action plan for each.

Quotations
Create real-time quotations from simple requests for services and products through using engineering cost structures from existing products, same-as-except products and new products. Manage quotation changes and re-quote opportunities within the same opportunity.

Convert Quotes to Orders
Easily convert an entire quotation to a sales order in one step.

Forecasting
Manage forecasts by opportunity probability, category and territory. Analyze sales quota and forecast at each level of the sales team.

Performance Analysis
Manage sales teams by analyzing performance at each level of the sales structure, from the region level down to the representative level.

Win/Loss
Analyze win/loss information by sales region, representative, opportunity category, or other criteria.

Epicor Information Worker
Synchronize essential Epicor CRM data with Microsoft Office to make sales people more effective. Whether connected or disconnected, the sales staff has full access to prospect and customer information, including sales history within Microsoft® Outlook®, Microsoft Excel®, or Microsoft Word®. Quotations or estimates generated as Word documents or Excel Spreadsheets use data direct from Epicor and update the system as required.

Case Management

Case management is an essential part of building better business. Improving the productivity and effectiveness of your support center leads to increased customer satisfaction. Epicor CRM Case Management delivers solutions that help you deliver first-rate service to your customers while controlling costs. The result? A strong return on investment through happy customers who make additional purchases and generate new business through referrals.

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 enables your service team to manage current case load and respond quickly to customers for

industry leading customer satisfaction. The case management workbench is equipped with time saving links to customer focused activities (e.g., new quotes, orders, RMA requests, or service calls). In addition, there is a search-driven knowledgebase and case-driven workflow for standardizing case resolution.

Case Management is fully integrated with Field Service, part of Epicor Service Management, for easy access to dispatching field activities and providing field service representatives access to online answer books, existing customer field service calls, warranty information, and service contracts.
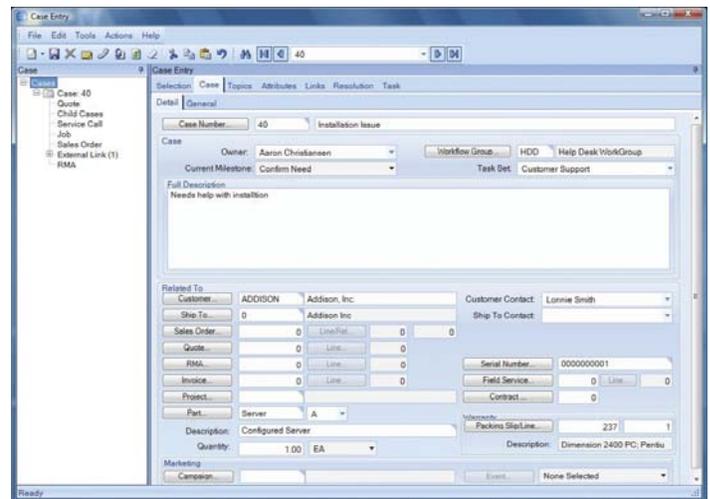
Shorten customer service response time by collecting detailed incident and problem information and initiating appropriate service and support requests to aid effective resolution.

Case Management Workbench
Manage open case load by status (e.g., open or under review) and allow support managers to assign outstanding cases. Review customers, quotes, orders, outstanding returned material authorization requests, field service calls, warranties, service contracts, and cases from a single case workbench.

Convert Case
Easily generate a quote, order, field service order, repair order, job and RMA from a case, bringing the detail of the case into the new document.

Case Context
Use case-specific details (e.g., part number, order number, service call reference or warranty reference) to inquire into and link directly to related information, optionally generating new transactions.

Case Categories
Inquire and report cases by user-defined categories.

Workflow

Monitor every stage of the support process. Manage processes using user-defined workflow that is case or issue specific, ensuring standardization of process and that nothing slips through the cracks.

Alerts

Set up user-defined alerts to notify activities regarding service cases to management or specialized service employees.

Online Knowledgebase

Tap into enterprise-wide knowledge documents for fast customer case resolution. Link knowledge documents to cases for analysis.

Contact Management

Manage and record all customer interactions for enterprise wide visibility of customer satisfaction. Link contacts related to a case for easy review of complete case history.

Communication

Manage and document communication between customer service or field service and the customer for enterprise-wide visibility of customer case and resolution.

Traceability

Link documents and communication events such as e-mails to cases and calls.

Mobile Connect

Epicor CRM gives you control over your customer interactions: generating leads, developing opportunities and monitoring orders. Epicor CRM functionality is available from anywhere in the world. The Mobile Connect series incorporates a disconnected database, enabling you to work anywhere you can take your laptop. Using the SonicMQ® messaging engine, Mobile Connect is comprised of three components: Sales mConnect, Sales Engineer mConnect and Hub mConnect.

Epicor Mobile Connect helps your sales representatives and sales engineers stay connected with their customers without requiring network connections.

Sales mConnect

- Generate new opportunities or fine tune existing quotations

- Create and complete workflow tasks

- Activate or process calls

- Complete on-the-fly product configuration

- Add new customers and contacts

- Import customers and contacts

- Edit existing customer or contact information

- Produce marketing lists

- View business activity monitor queries

- Modify aging report formats

- Secure the system so users can view only sales information assigned to their territory

- Run the following reports:

  - Order backlog

  - Scheduled shipments

  - Aged receivables

  - Advance billing/deposit balance

  - Customer statements

  - Sales analysis

  - Sales gross margin

  - Quote form

  - Order form

  - Invoice form

- Access the following types of information from Epicor Trackers:

  - Aged receivables

  - Quotes, orders, jobs, and parts

  - Customer data

  - Project information

  - Quantities on-hand

  - Time-phased balances

  - Customer and miscellaneous shipments

  - Returned material authorizations (RMAs)

  - Invoice information

Sales Engineer mConnect

All the functionality of Sales mConnect is included, plus the ability to engineer entire BOMs. Use drag-and-drop functionality to add subassemblies, operations and materials, or incorporate parts on-the-fly.

Hub mConnect

Configure your remote sales office server with Hub mConnect, and multiple Mobile Connect users can access its database simultaneously. Individual Mobile Connect users don't need to synchronize, because Hub mConnect does it all. And there's no downtime due to lost connections to a remote database.

Synchronization
Mobile Connect provides full and light options for synchronizing your remote database with your primary Epicor database, ensuring data integrity and consistency, and fast and easy updates.

Information Worker

According to current industry surveys, desktop productivity tools are used by 95% of business workers, with Microsoft Office as the standard for desktop applications. Epicor Information Worker (IW) provides a secure, seamless interface to your Epicor CRM applications within Microsoft Outlook, Microsoft Excel, or Microsoft Word. Imagine the productivity and business visibility you will gain by using Epicor IW as an interface for both traditional and non-traditional Epicor users.

Epicor IW is an innovative productivity tool that works seamlessly within a familiar Microsoft Office environment to enable business users to get all the information they need, in context, in realtime when they need it and where they want it. It does this by blurring the lines between enterprise software and desktop productivity software to create a single immersive solution.
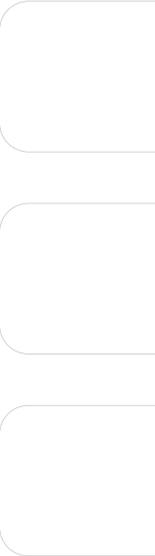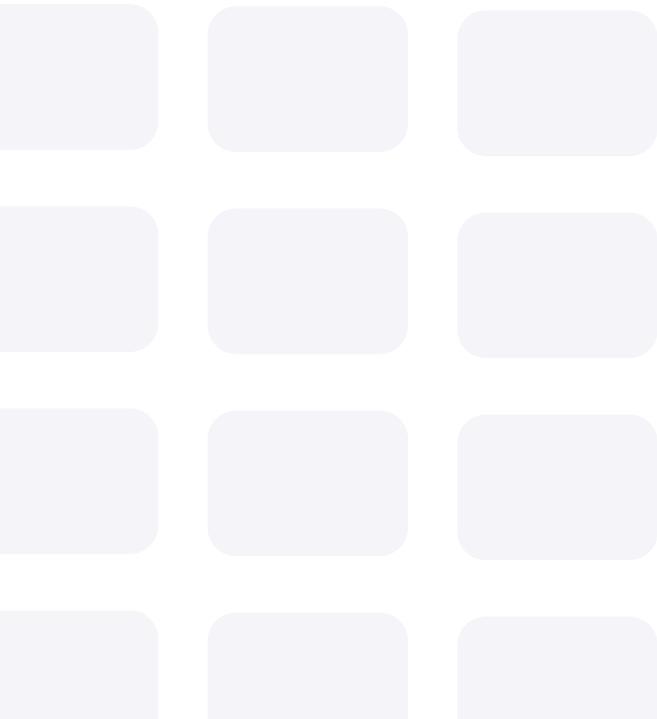

Help your sales people stay on top of their opportunities, tasks, and proposals by utilizing Epicor Information Worker seamlessly with Microsoft Office productivity tools.

Work In Context, Online and Offline
With Epicor IW, you no longer have to leave what you are currently doing to get the data you need. Simply download the data directly into your Microsoft Office application. With a few clicks of the mouse, add Epicor contacts, tasks, calendar items, and other data into your Microsoft Outlook lists.

Extend The Reach of Epicor Applications
Many business workers simply don't need to utilize all the powerful features of your Epicor applications, but they do need access to the data. Epicor IW combines with Microsoft Outlook, Word, and Excel to allow authorized users to retrieve, view, and modify Epicor data. Epicor application licenses are utilized efficiently —minimizing the licensing impact on your organization and easily allowing more users access to your Epicor solution.

Reduce Training Time and Expense
You have already made the investment in your Epicor software to automate routines, capture data, and adhere to corporate standards and policies. But, not all of your people need to use these applications. Enabling users to access enterprise data within Microsoft Office requires minimal to no training because they work seamlessly in a familiar Microsoft environment—allowing them to become more productive very quickly.

Support Your Customer Relationship Initiatives
Imagine having a 360-degree customer view within Microsoft Office. No more toggling back and forth between Epicor and Microsoft Office. Outgoing and incoming customer e-mails can be automatically logged as Calls. Tasks and appointments are visible within Outlook or Epicor, enabling employees to share and view multiple calendars in Outlook. Consider how convenient and productive it would be for a salesperson to download customer information and work with it offline. That same salesperson can add or update customer information from within Microsoft Office applications at any time and from any location, and then synchronize those changes later with Internet access.

Epicor IW can help you exceed your customers' expectations. Your customers will be impressed with how well everyone in your organization knows the details of their account anywhere, anytime. Now envision the surprise phone call from a customer and your ability to get the information you need, in your Microsoft application, with just a few clicks of the mouse. Your sales organization, customer service workers and business executives—everyone in the company—can easily retrieve and update customer information within Microsoft Office while at work or on the road. The powerful combination of Microsoft Outlook, Microsoft Word, Microsoft Excel, and your Epicor data empowers all business workers to offer informed and responsive customer service, which translates to higher customer satisfaction.

About Epicor

Epicor Software (NASDAQ: EPIC) is a global leader delivering business software solutions to the manufacturing, distribution, retail, hospitality and services industries. With 20,000 customers in more than 140 countries, Epicor provides integrated enterprise resource planning (ERP), customer relationship management (CRM), supply chain management (SCM) and enterprise retail software solutions that enable companies to drive increased efficiency and improve profitability, and also empower global enterprises to achieve even greater success.

www.epicor.com

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