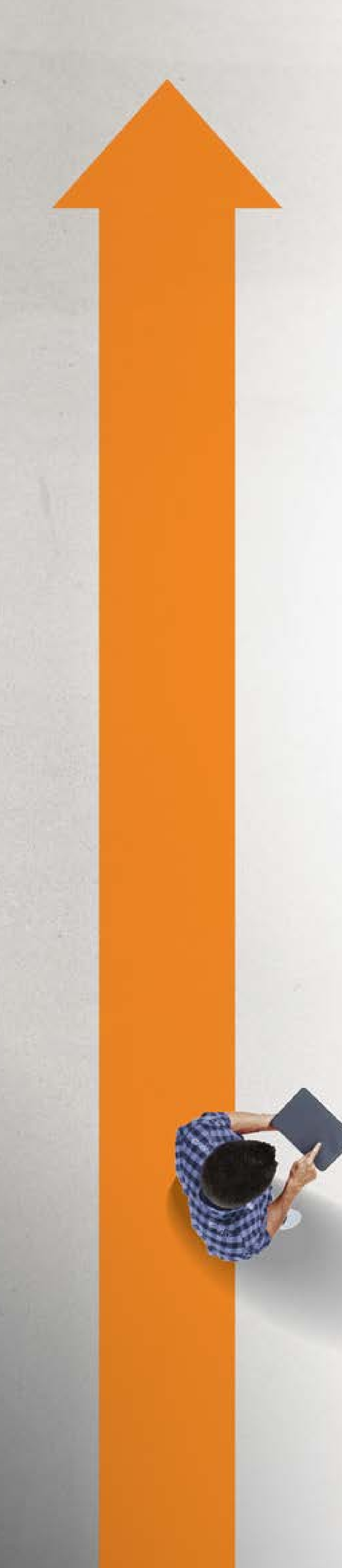


Epicor

Customer Relationship Management

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

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 effectively manage your entire customer lifecycle from prospect to cash to care, improve operational efficiency and accelerate growth—both internally and externally.

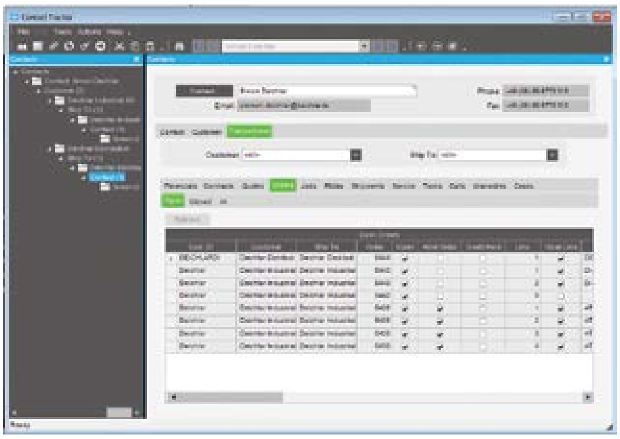
CRM controls every aspect of a company's interaction with its customers and potential customers from generating the lead, developing the opportunity, taking the order, producing and shipping or supplying the goods or services, getting the cash and supporting the customer. Epicor CRM provides a 360-degree view of the entire customer, supplier, or partner relationship. 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, partners can collaborate with internal information workers to ensure the highest possible customer satisfaction.

- Contact Management
- Lead and Opportunity Management
- Case Management
- Marketing Management
- Mobile CRM
- Customer Connect

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.

Social Networking

Use Social Networking to stay connected to business contacts. Epicor includes fields on the contract record to store information like the IM address, Facebook ID, LinkedIn® ID, and Twitter ID.

Epicor Social Enterprise allows interaction with contacts using social-media concepts to improve communication. If allowed, contacts can subscribe to receive updates about their own customer accounts, service calls, cases, quotes, RMAs, orders or any other changes to their information in Epicor ERP. These notifications can then be shared or re-posted to other people or used as the catalyst to interact more closely with your organization with all interaction stored against the target object (Case, Sales Order etc.) within Epicor CRM.

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.

Account Hierarchies

Create, manage, monitor, and control account 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

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.

Customer Connect

Epicor Commerce Connect, Customer Connect portal provides interactive customer facing content over the Web. Today's customer requires new 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.

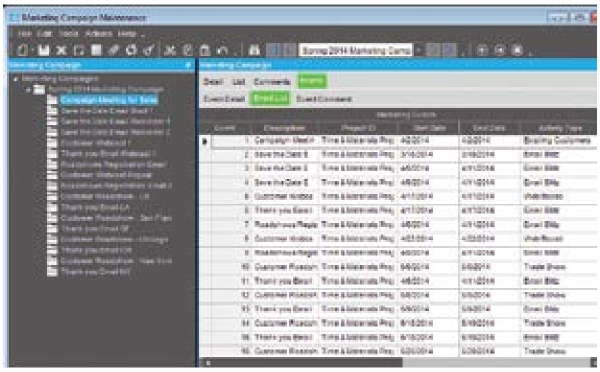
Marketing Management

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.

Campaign Management

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



Establish, monitor, and measure the entire marketing mix for a greater return on investment from marketing programs.

Data Management

Extract marketing lists based on any criteria such as customer type (e.g., 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. Deduping capabilities allow the management of imported lists and the tidying up of the marketing database.

Campaign Connect

Campaign Connect makes marketing communication easy by managing 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.

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

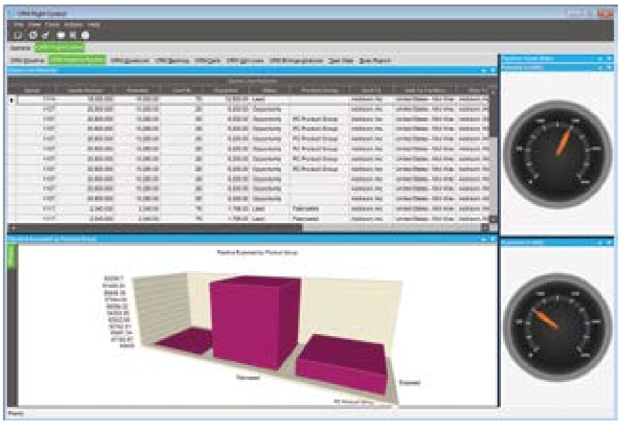
Manage requirements for effective permission marketing through structured opt-out controls that are enabled on a campaign basis or globally. Additionally, allow respondents to determine whether they receive text or HTML-based communications.

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.



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

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 up-selling or cross-selling to existing customers, 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.

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.

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 an opportunity/quote 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 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.

Social CRM

Collaborate with internal stakeholders and authorised prospects/customers around quotes using Epicor Social Enterprise (ESE) to drive win rates. All interaction around the quote in ESE is safely stored and archived in the Epicor ERP database and easily available for future reference using Epicor Search or using an activity stream viewer in Epicor.

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, sales staff have 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 from Epicor ERP and update the system as required.

Case Management

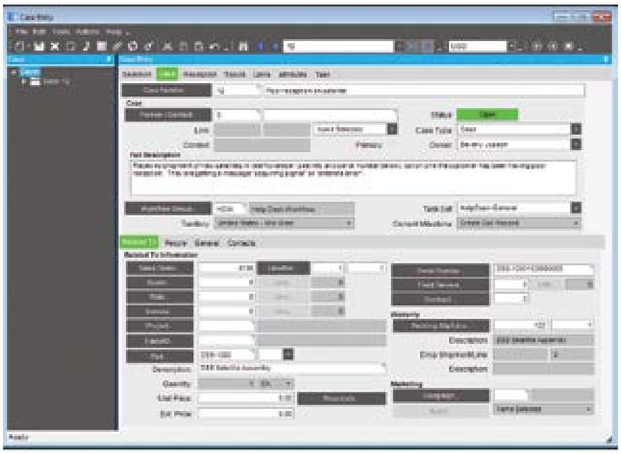
Case management is an essential part of building better business relationships. Improving the productivity and effectiveness of your support center leads to increased customer satisfaction. Epicor CRM Case Management delivers solutions that help you deliver first-rate service to your customers while 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.

Social Service

Epicor Social Enterprise allows customer service representatives, field service engineers, other experts and even authorised customers the opportunity to work together to resolve problems, exchange knowledge and close open calls. The Case serves as the reference number for all interaction in ESE whether this is related to the Case directly, a service job or any follow up calls. The information stored against the Case can easily be used to create a knowledge base or information source (such as a wiki) that outlines how the problem or similar issues can be resolved in the future.



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 and any interaction around the case using ESE 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 process. Manage processes using user-defined workflow and assigned roles that are 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 Sales Assistant

Mobile Sales Assistant is an enterprise mobility solution for sales and distribution that provides complete sales and fulfillment workflow for quotes and orders, inventory management, payment, and proof-of-delivery. It is great for businesses who sell from the back of a truck or warehouse. Mobile Sales Assistant includes standard capabilities such as customer maintenance, customer history, replenishment and comprehensive product pricing and taxation schedules. Barcode enabled mobile devices automate the scanning of pickups, deliveries, stocktaking, back orders, and returns with portable printing solutions or automated PDFs sent direct to the customer from Epicor ERP.

Mobile Sales Assistant is fully integrated with Epicor ERP products but can operate independently with or without a connection to the Internet. When a connection is available transactions synchronize between the mobile device and the ERP.

You can use Mobile Sales Assistant with Apple® iPhone®, iPad®, Android™ phones and tablets, and windows mobile devices. This provides you the flexibility to use the right device for the right environment and still provide the same easy to use application.

With Mobile Sales Assistant, your sales force and back office will collaborate more productively, be more responsive to customer needs and provide superior levels of customer service.

The Mobile Sales Assistant main menu provides access to the key functions including quoting, order processing, fulfillment and payment.

Mobile CRM

Epicor Mobile CRM is delivered as part of the Epicor ERP business architecture and enables mobile sales and service teams untethered access to enterprise data allowing delivery of high levels of customer satisfaction. For salespeople who like to spend more time in front of the customer and less time behind a computer, Mobile CRM enables access to key CRM functions such as customer and contact management, lead management and follow up, estimating and quote management, and case management. Mobile CRM users can even turn quotes into sales orders. Additional CRM capabilities such as product configuration, sales order management, and engineering are available with additional licensing.

Using Epicor's architecture, access to key trackers and dashboards as well as functions within the ERP solution is easy to maintain for optimum accuracy and collaboration around customer issues. Keeping your customer at the focus of your business is easier with mobile workers using real time tools to enable change in the front office, the warehouse, and the plant floor; ultimately driving new loyalty from customers.

Six S Partners
866-579-7497
sales@sixspartners.com
www.sixspartners.com

Contact us for more information on Epicor Products and Services

866-579-7497 sales@sixspartners.com www.sixspartners.com

SIX S PARTNERS
ERP Consulting

EPICOR
Platinum Partner