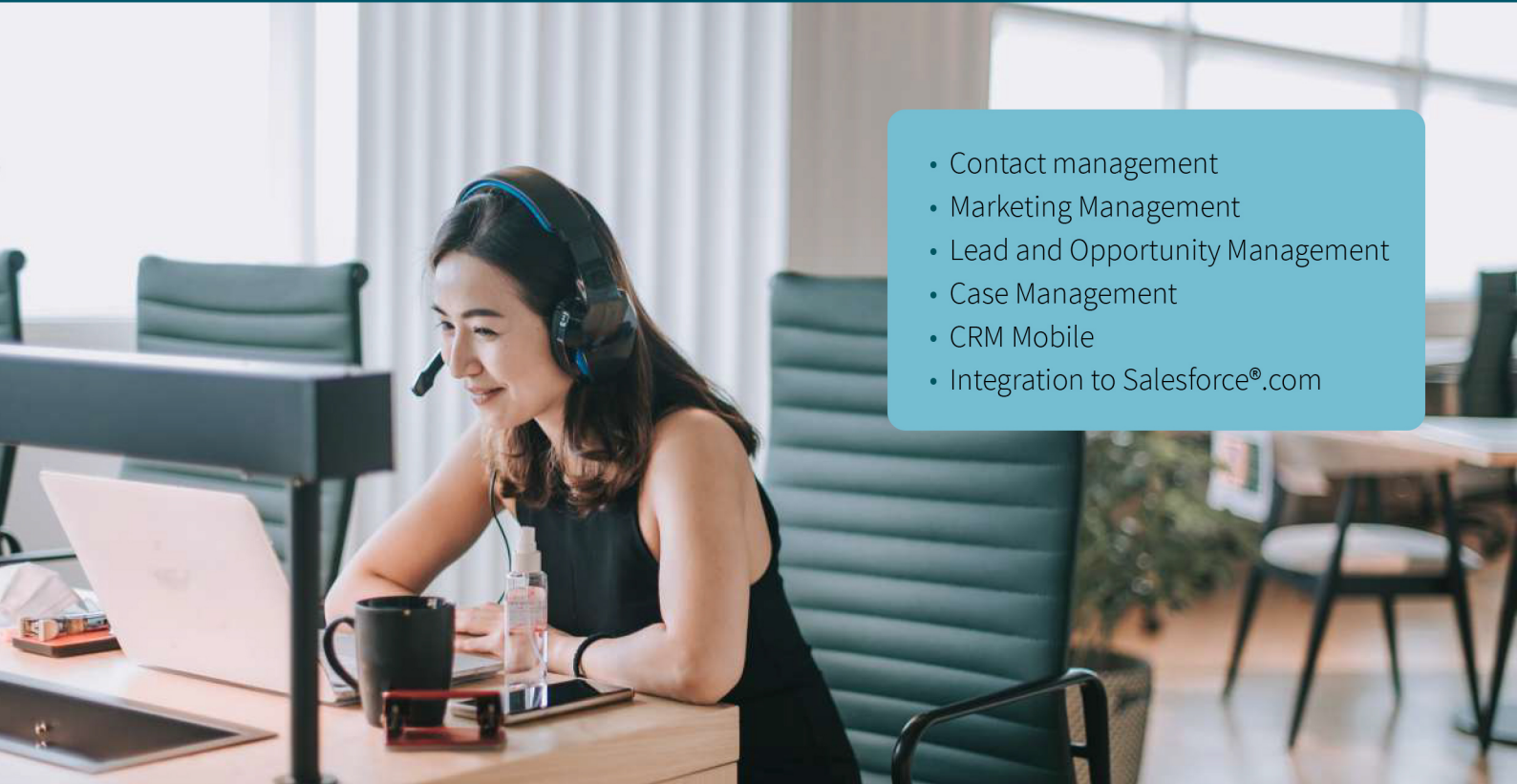# EPICOR
Kinetic
Customer Relationship Management

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

Customer relationship management (CRM) strategies are as important to businesses today as they have ever been. We've designed our 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. CRM provides a 360-degree view of the complete customer, supplier, or partner relationship. CRM broadens the scope of customer information to everyone within and across the organization and to stakeholders beyond.

Collaborate further enhances CRM, delivering up-to- date contextual information to key stakeholders for the life of the customer relationship. Customers, prospects, and partners can interact to share information to target high customer satisfaction.

Gold Partner:

BISCIT
limitless possibilities

Contact Management

Keep in touch with your customers and prospects 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. Improve overall focus and responsiveness by putting your contacts at the center of your business.

Marketing Management

With eMarketing and eSurvey, 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 CRM. You can import contacts, create targeted emails, and measure the success of your campaigns.

Lead and Opportunity Management

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 Information Worker also enhances the effectiveness of your sales force by synchronizing essential 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.


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 the 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.

CRM Mobile

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. The CRM Mobile application empowers your salesforce by providing mobile access to the entire CRM suite of capabilities on iOS™ and Android™ devices. Through CRM Mobile,
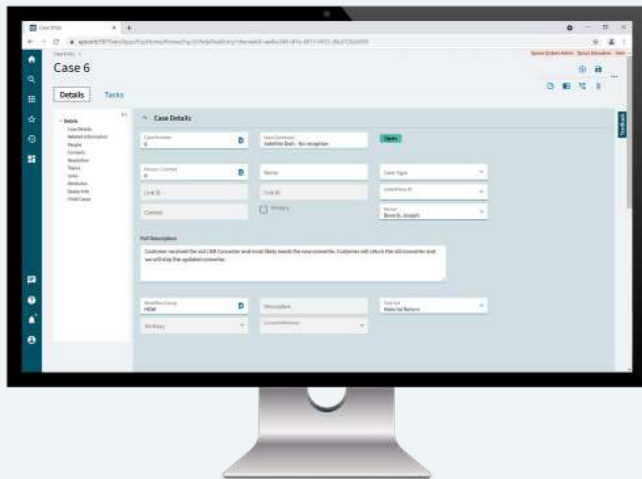
Case Management – Shorten service response time by collecting detailed product problem information and using integrated featres to initiate requests to the appropriate resource.
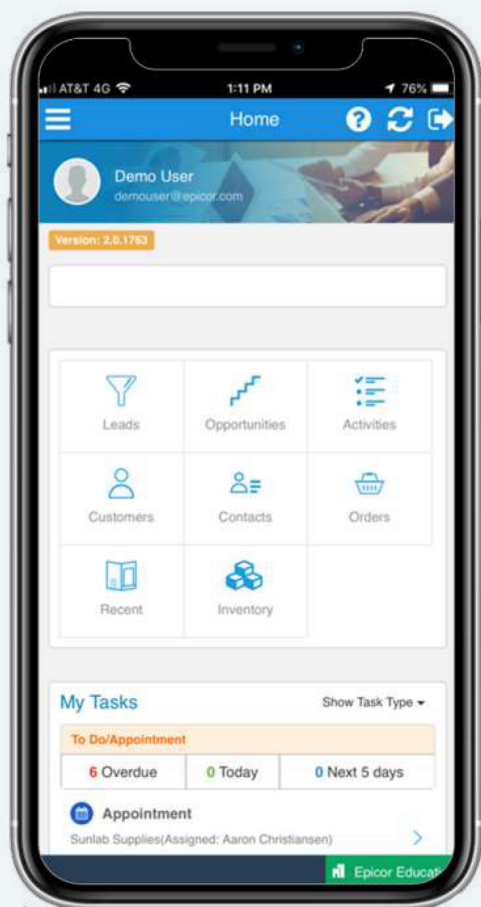
With CRM Mobile manage the sales cycle from opportunity to order shipment—anytime, anywhere.

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, 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. Search your inventory to verify product availability, create Sales Orders (even from Opportunities), and finally ship them to your customers—all from the mobile device of your choice.

Integration to Salesforce.com®

Integrating Salesforce with Kinetic amplifies the value of each application by increasing data accuracy, allowing widespread automation, supporting new use cases, and enabling a more efficiently run business.

Epicor Integration Cloud – powered by Jitterbit – includes robust Salesforce software and Kinetic connectors. Together, they make up the fastest, most complete way for Salesforce software and Epicor customers to marry key processes. Using pre-built accelerators implemented by the Epicor integration team, pricelists, parts, customers, and quotes are integrated between the two systems.