

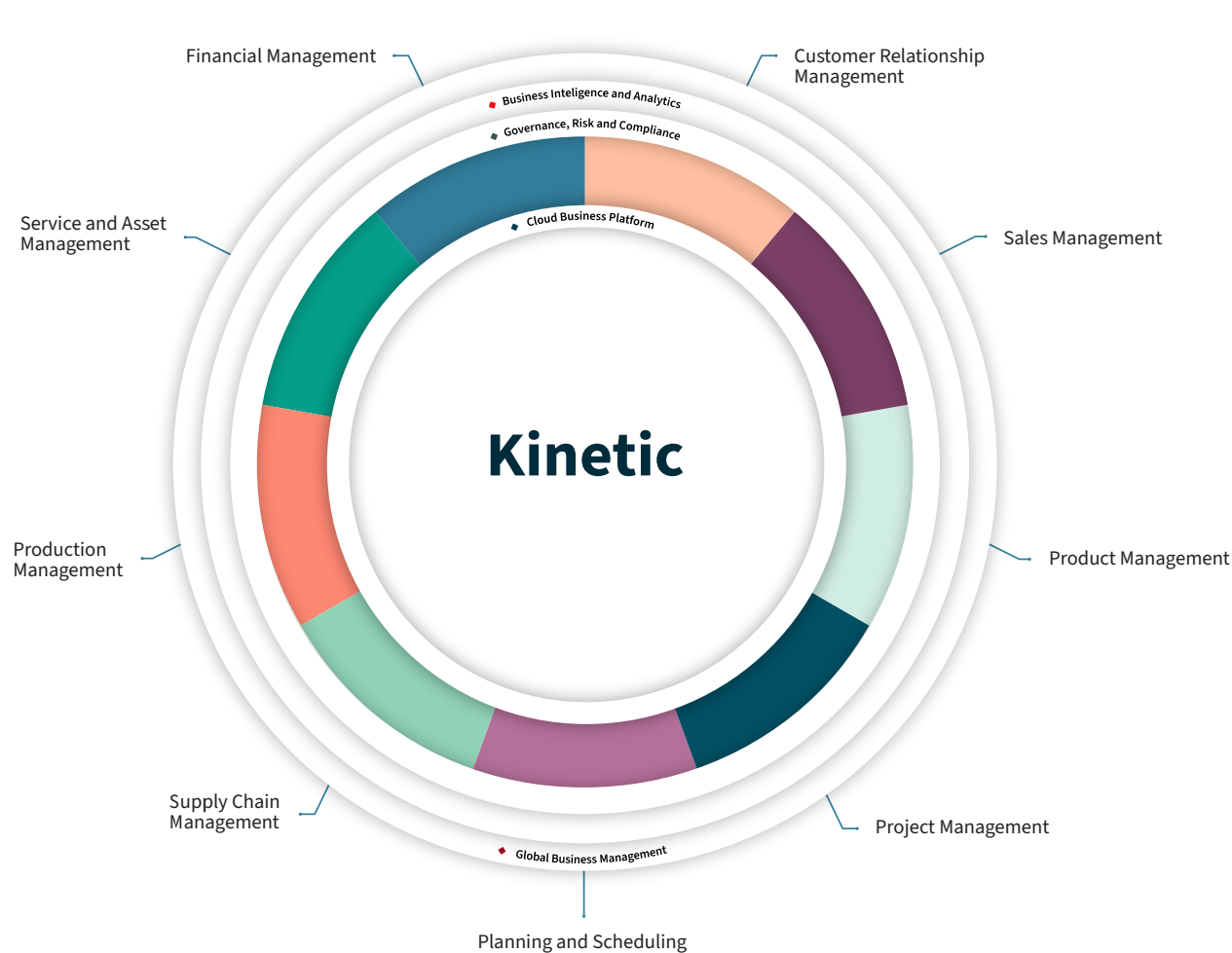
EPICOR

Customer Relationship Management



MANUFACTURING





- ### Financial Management
- Global Engines
 - General Ledger
 - Accounts Receivable
 - Accounts Payable
 - Tax Automation
 - Financial Reporting
 - Financial Planning and Analysis
 - Credit Card Payments
 - Cash Management
 - Credit and Collections
 - Asset Management

- ### Customer Relationship Management
- Epicor Contact Management
 - Epicor Marketing Management
 - Epicor Lead and Opportunity Management
 - Epicor Case Management
 - CRM Mobile
 - Integration to Salesforce.com*

- ### Product Management
- Bill of Materials
 - Routings
 - Engineering Change and Revision Control
 - Document Management
 - CAD Integration
 - Product Lifecycle Management
 - Product Costing
 - Product Configuration

- ### Planning and Scheduling
- Forecasting
 - Master Production Scheduling
 - Smart Demand Planning
 - Epicor Material Requirements Planning (MRP)
 - Scheduling and Resource Management
 - Advanced Planning and Scheduling

- ### Production Management
- Epicor Job Management
 - Advanced Production
 - Kanban Lean Production
 - Data Collection
 - Epicor Advanced MES
 - Quality Assurance
 - Epicor Quality Management System (QMS)

- ### Service and Asset Management
- Service Management
 - Returned Material Authorization
 - Service Contract and Warranty Management
 - Epicor Case Management
 - Maintenance Management
 - Field Service Management

- ### Sales Management
- Estimate and Quote Management
 - Order Management
 - Sales Order Automation
 - Epicor EDI/Demand
 - Management-Point of sale
 - Epicor Commerce
 - Dealer Portal
 - Epicor CPQ

- ### Project Management
- Project Planning and Analysis
 - Project Generation
 - Project Billing
 - Resource Management
 - Contract Management
 - Planning Contract
 - Time Management
 - Expense Management
 - Epicor Advanced Project Management (APM)

- ### Supply Chain Management
- Purchase Management
 - Supplier Relationship Management
 - Supplier Portal
 - Inventory Management
 - Epicor Advanced Materials Management
 - Advanced Unit of Measure
 - Shipping and Receiving
 - Epicor Quick Ship
 - Epicor Warehouse Management System (WMS)
 - Supplier EDI and B2B Integration

- ### Governance, Risk and Compliance
- Corporate Governance
 - Risk Management
 - Security Management
 - Business Process Management
 - Global Trade Compliance
 - Electronic Reports Engine
 - Environmental and Energy Management

- ### Global Business Management
- Multicompany Management
 - Multicurrency Management
 - Global Multisite Management
 - Multilingual Data Management
 - Master Data Management
 - Scalable, Distributed Deployment
 - Global Engines

- ### Cloud Business Platform
- Mobile, Browser-Based Experience
 - Epicor Automation Studio, Powered by Workato: iPaaS + Automations
 - Epicor Virtual Agent
 - Epicor Collaborate
 - Enterprise Search
 - Epicor Learning
 - Epicor Business Process Management (BPM)
 - Epicor Enterprise Content Management (ECM)
 - Business Workflow Automation
 - IoT and IIoT Applications
 - Epicor Commerce
 - Epicor ED and B2B Integration
 - Electronic Reports Engine
 - Epicor Application Studio Configuration
 - REST Services and Epicor Functions
 - Updatable Dashboards
 - Epicor Integration Cloud
 - Deployment Flexibility
 - Microsoft Azure Cloud
 - Security Management
 - Data Fabric

- ### Business Intelligence and Analytics
- Operational Reports/Dashboards/IIOT/OEE
 - Descriptive Analytics (Business and Financial User Reporting/Dashboards)
 - Diagnostic Analytics (Scorecards/KPIs, Financial Planning)
 - Predictive Analytics (Forecasting)
 - Data Warehousing
 - Role-Based Analytics and Business Intelligence
 - Mobile Business Intelligence

Contents

Contact Management	5
Marketing Management	5
Lead and Opportunity Management	5
Case Management	6
CRM Mobile	6
Integration to Salesforce.com	7



Introduction

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.





Contact Management

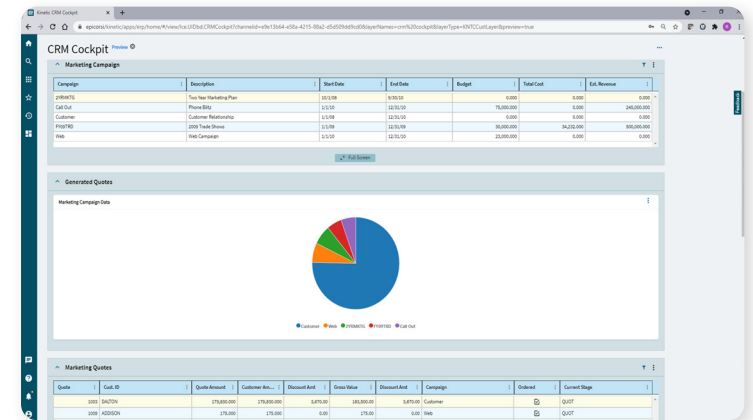
Keep in touch with your customers and prospects by promoting responsive, respectful, and proactive communications. Contact Management enhances your customer service by documenting and sharing customer communication with the entire organization and helps manage contact interactions through task management. 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.

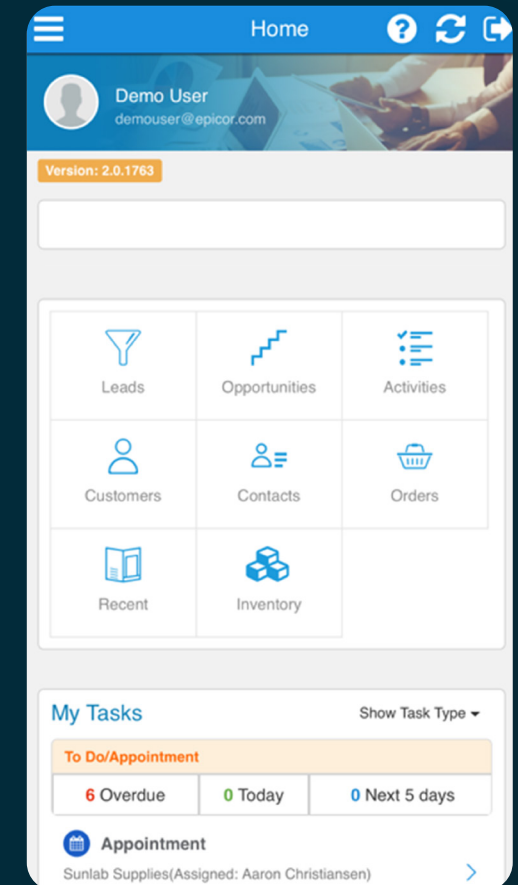
Case Management

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, 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. 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.



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



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.

The screenshot displays the Salesforce Case Management interface for 'Case 6'. The left sidebar contains navigation links for Details, Tasks, Case Details, Related Information, People, Contacts, Resolution, Topics, Links, Attributes, Dealer Info, and Child Cases. The main content area is titled 'Case 6' and includes a 'Details' tab. The 'Case Details' section contains the following fields:

- Case Number: 6
- Issue Summary: Satellite Dish - No reception
- Open button
- Person / Contact: 0
- Name
- Case Type
- Link ID
- Link ID
- Linked Row ID
- Context
- Primary checkbox
- Owner: Beverly Joseph
- Full Description: Customer received the old LNB Converter and most likely needs the new converter. Customer will return the old converter and we will ship the updated converter.
- Workflow Group: HDW
- Description
- Task Set: Material Return
- Territory
- Current Milestone

Case Management – Shorten service response time by collecting detailed product problem information and using integrated features to initiate requests to the appropriate resource.





We're here for the hard-working businesses that keep the world turning. You're the companies that make, move, and sell the things we all need. Trust Epicor to help you do business better. Your industry is our industry, and we understand you better than anyone. By working hand-in-hand, we get to know your business almost as well as you do. Our innovative industry solution sets are carefully built to fit your needs and respond flexibly to your fast-changing reality. We accelerate ambitions, whether you want to grow and transform, or simply become more productive and effective.

That's what makes us the essential partner to the world's most essential businesses.

Contact Us Today: info@epicor.com | www.epicor.com

This document is informational only. Epicor Software Corporation makes no guarantees, representations, or warranties to the information and disclaims, any implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality, or reasonable skill and care. Testimonials are unique to the particular user and may vary. Epicor and the Epicor logo are trademarks of Epicor Software Corporation. Other trademarks are the property of their respective owners. Copyright © 2023 Epicor Software Corporation. All rights reserved. Rev. February, 2024.

