

Customer Relationship Management

Epicor iScala CRM powered by Microsoft CRM®

Increase sales success, deliver superior customer service, and make informed, agile business decisions with Epicor iScala CRM. Accessible from Microsoft Outlook® and the Web, Epicor iScala CRM is easy to use, customize, and maintain, integrates with the Epicor iScala ERP system, and scales to grow along with your business. Epicor iScala

CRM is based on Microsoft CRM, with Microsoft CRM functionality embedded in Epicor iScala's business processes. With Epicor iScala CRM you can increase sales success by shortening the sales cycle, improving pipeline visibility and close rates with leads and opportunity management, automated sales processes, quote creation, and order management. Applying a two tier approach to lead management, you can increase the quality of leads and make sure that your sales people only receive the most highly qualified leads.

You'll be able to deliver efficient, consistent customer service through a shared knowledge base—and automated routing and queuing make it easy to serve those customers efficiently. Informed, agile decisions are easy with Epicor iScala CRM's comprehensive reports — letting you forecast sales, measure business activity and performance, evaluate sales and service success, and identify trends, problems, and opportunities.

Epicor iScala CRM is accessible from either Outlook or the Web, so you can work with contacts, accounts, leads and opportunities online or offline. And, with its tightly integrated Sales and Customer Service functionality, it's easy to view, update, and share information across teams and departments. Importantly, Epicor iScala CRM is designed for ease of use, ensuring that your sales teams get started fast. Finally, you can customize and scale easily — letting you configure user interfaces and workflow processes, to create solutions to fit your business, and scale these installations to meet changing needs. Together with tight integration with Microsoft Office® and Epicor iScala ERP, Epicor iScala CRM is the right choice for growing businesses like yours.

Epicor iScala CRM Sales

MICROSOFT OUTLOOK CLIENT

E-mail is today's Number One collaboration tool; therefore, basing your contact management strategy by integrating Outlook into your sales processes is a recipe for success. You can also work online or offline through Outlook, with accounts, contacts, leads and opportunities and other sales functionality.

COMPLETE CUSTOMER VIEW

View all contact and account information and history from a central location, including customer service records.

INFORMATION SHARING

Tightly integrated Sales and Customer Service modules make it easy to share information across departments.

LEADS AND OPPORTUNITY MANAGEMENT

Import leads, automate leads routing and escalation, convert leads to opportunities, and track and manage opportunities through the sales cycle.

SALES PROCESS MANAGEMENT

Automate stages in the selling process to track and close sales efficiently and consistently.

PRODUCT CATALOGUE

Create a full-featured product catalogue that includes complex pricing levels, units of measure, discounts, and pricing options.

ORDER MANAGEMENT

Easily convert quotes to orders, and then modify and save orders until they are ready to be submitted and invoiced.

QUOTAS

Measure employee sales performance against individual goals.

REPORTS

Forecast sales, identify top opportunities and customers, and evaluate trends with robust reporting tools.

SALES LITERATURE

Maintain a searchable library of sales literature that can be used online or offline.

TERRITORY MANAGEMENT

Create sales territories and manage territory-based processes with workflow rules and reports.

COMPETITOR TRACKING

Analyze competitor performance and maintain a library of articles on competitor activity.

CORRESPONDENCE AND MAIL MERGE

Create and send e-mail, using customized templates, to targeted prospects and customer groups. Create and send print communications using Microsoft Word.

Epicor iScala CRM Customer Service

CASE MANAGEMENT

Create, assign, and easily manage cases for customer service requests. Manage actions and communications for each case from a central location.

COMPLETE VIEW OF ACCOUNTS

View all accounts, including sales and order information, to identify top customers and better understand specific customer needs.

AUTOMATED ROUTING AND QUEUING

Workflow rules let you automatically route service requests and cases to the appropriate representative or to queues for resolution, escalation, or reassignment.

SEARCHABLE KNOWLEDGE BASE

Publish support articles and other relevant support information to a searchable knowledge base.

SERVICE CONTRACTS

Easily create and maintain service contracts within Epicor iScala CRM. When a support case is resolved, relevant contract information is updated automatically.

AUTO-RESPONSE E-MAIL

Generate auto-response e-mails to customer requests.

E-MAIL MANAGEMENT

Maintain an accurate record of customer-related communications, with automated tracking of customer e-mails that associates those mails with appropriate customer records. Epicor iScala CRM Integration

SALES AND CUSTOMER SERVICES FUNCTIONALITY

Sales and Customer Service functionality integrates tightly, making it easy to share information across the business.

MICROSOFT OUTLOOK CLIENT

Salespeople can use Microsoft Outlook to work online and offline with access to contacts, accounts, leads and opportunities and other sales functionality

MICROSOFT OFFICE

Integration with Microsoft Office lets users create print communications using Microsoft Word Mail Merge, as well as export data to Microsoft Excel.

EPICOR iSCALA ERP

Epicor iScala CRM can be used either standalone or, as it's an integral module of Epicor iScala ERP, within the Epicor iScala ERP suite. Accounts of a Customer type are synchronized with Customers in the Sales Ledger, either online or offline — with data synchronization occurring when you go online. While working with Accounts in Epicor iScala CRM, you can query customer-specific data including payment terms, delivery terms and other information stored in the Customer file of the Epicor iScala Sales ledger.

While working with Epicor iScala CRM, you can browse active products coming from the Epicor iScala Stock Master File and change CRM-specific attributes. Within Epicor iScala CRM, a salesperson's information is updated with cumulative data and statistics coming from Epicor iScala ERP.

THIRD-PARTY APPLICATIONS

Epicor iScala CRM functionality can be exposed through platform APIs for integration with third-party and Web services.

Epicor iScala CRM is designed to meet budget and support needs for small-to-medium size businesses. Delivery and implementation — which can be direct through Scala Business Solutions or through our certified partners — includes hands-on assistance with set-up and maintenance processes, along with comprehensive training and support resources.

Your benefits

- Better visibility into the pipeline and across sales activities
- Improved quality of leads and closure rates
- All customer-related information and activities are stored in one place. You get a complete view of your customers!
- Integrates with Microsoft Outlook and Microsoft Office: e-mail time is less; reports can be exported into Excel
- Reports are fast and easy, with over 130 standard reports “out-of-the-box” as well as the ability to create your own.
- Your sales people will love it. It requires minimum training and interface looks like Outlook. Therefore, using Epicor iScala CRM you will achieve high end user adoption rates and can get up and running in production operations in weeks, not months.
- Easy to customize to reflect your specific sales process
- Out-of-the box integration with Epicor iScala ERP, so if you are an Epicor iScala ERP client, you do not have to spend time on integrating, but rather you can focus on improving your customer relationship processes.
- Integration with Epicor iScala ERP will give you access to Epicor iScala's rich sales order management and fulfillment functionality, including inventory visibility, multi-currency, VAT and local legislation.

In a nutshell, Epicor iScala CRM will help you reduce costs, improve your revenues, increase your customers' satisfaction and create a consistent favorable experience for your customers' interactions with your organization.

Epicor iScala CRM System Requirements

EPICOR ISCALA CRM SERVER HARDWARE

- Computer/Processor: Dual 700MHz or higher Intel Pentium (XEON PIII) or compatible CPU.
This is a minimum recommendation
- Memory: 1 GB
- Hard disk: SCSI with hardware RAID 5 and three hard drives minimum
- Network Card: 10/100 megabit Epicor iScala CRM Server Software
- Microsoft Small Business Server 2000 or later

OR

- Microsoft Windows 2000 Server Standard/Advanced Server or later
- Microsoft SQL Server 2000 Standard or later
- Microsoft Exchange Server 2000 or later

Note: Significant performance improvements using Microsoft Windows 2003 Server.

EPICOR ISCALA CRM CLIENT SOFTWARE

- Microsoft Windows 2000 Professional or later.
- Microsoft Internet Explore 6.0 Epicor iScala CRM Sales for Outlook Software
- Office 2000 or later.

About Epicor iScala

Epicor iScala is the most globally available ERP solution, fully supported by the standard Signature implementation methodology. A set of migration tools is available for existing Scala customers who wish to migrate or upgrade to the latest release of Epicor iScala. For further details please contact your local Scala representative or visit www.scala.net/iScala.



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