

# Sales and Marketing

MANAGE THE LIFE OF A LEAD

INCREASE SALES EFFICIENCY

ENHANCE SALES EFFECTIVENESS

KEEP IN TOUCH WITH CUSTOMERS

EASY TO USE, EASY TO CUSTOMIZE

DESIGNED FOR THE CUSTOMER-CENTRIC ENTERPRISE

Seeking new, profitable customer relationships is challenging in today's borderless world market. Targeting your customers with the right programs and messages and retaining those customers can be your most powerful competitive weapon. Epicor Clientele Sales and Marketing enables you to measure the success of marketing campaigns, understand your target market and improve communications. With Sales and Marketing, you can proactively manage your sales territories and the entire life cycle of all your opportunities. Sales and Marketing enables you to convert more prospects to customers, target the highest value opportunities and increase sales revenues.

## Manage the Life of a Lead

With Sales and Marketing, you can manage virtually the entire life cycle of a sales opportunity, from the time it enters your system as an inquiry to its conclusion as a new customer. You can easily capture critical prospect, customer and competitor information and share it with others throughout your enterprise. Plus, you can automate many routine tasks, freeing your sales professionals to concentrate on closing more business.

## Increase Sales Efficiency

With Sales and Marketing, you can automatically convert an opportunity to a quote and a quote to an order. You can check for duplicate records and the application's action plan feature can ensure that nothing falls through the cracks. Sales managers can enforce business rules and make accurate revenue predictions. Sales Forecasts are created automatically from opportunity information and available to sales managers online.

## Enhance Sales Effectiveness

Sales and Marketing helps you focus on the right opportunities with the most current information at your fingertips. For example, a list management feature creates campaign mailing lists on the fly. You can determine where and how to best search for more business. And, a competitor tracking database allows sharing of competitive tips between salespeople.

## Keep in Touch with Customers

With Microsoft<sup>®</sup> Outlook<sup>®</sup> integration and two types of follow-ups at your fingertips, Sales and Marketing makes it easy to be responsive and proactive with your customers. Its own follow-up monitor enables you to create and receive alarmed notifications of action items. Plus, you can e-mail or fax messages, as well as marketing and sales materials, to customers. Using Microsoft Word<sup>®</sup> templates, you can also streamline the letter-writing process.

## Easy to Use, Easy to Customize

Sales and Marketing gives you powerful searching and customization capabilities, as well as basic features, such as spell checking and attachments. Because it is highly customizable, the product works the way your business does, not the other way around. System options enable you to adapt it to fit your needs without touching a line of code. Plus, you have two levels of customization. Through a drag-and-drop process, you can easily modify forms and fields to create your own look and feel. Or, you can utilize the open architecture to modify how the forms and functions interact with your user's input. This allows your company to establish its own business rules by defining how a screen interacts with your data.

## DETAILED FEATURES

## MARKETING

- Identify how leads are generated.
- Pinpoint which activities produce the best leads
- Perform cost/benefits ROI
- Create and track specific mailing lists
- Track lead sources
- Implement a structured qualification process

## TELEMARKETING

- Enter complete initial lead data
- Build a complete contact history
- Implement process for contacting and converting leads

## OPPORTUNITY AND ACCOUNT MANAGEMENT

- Track every opportunity by account manager
- Track and report revenue by sales milestone
- Confidence factors automatically adjust forecast

- Track all contacts participating in the opportunity
- Track sales splits
- Implement a team selling approach
- Attach files or Web address to an opportunity
- View the entire call history of an opportunity
- Track business problem and recommended solution
- Keep up-to-date and share tips on competitors
- Conclude opportunities as won, lost, disqualified or no decision
- Easily implement, track and change sales processes
- Schedule appointments or tasks for an opportunity
- Review lead information

## MANAGING SALES QUOTAS AND TERRITORIES

- Reassign sales territories
- Define multiple sales forces

- Multiple reporting levels for roll-up reporting
- Adjust quota
- Coach individuals on sales team
- Define territories by geographic boundary or named account

## QUOTES AND ORDERS

- Create multiple quotes for same customer
- Identify primary quote for forecasting
- Line-item feature for building quotes
- Automatically recalculate revised quotes
- Discount by line item, the opportunity or both
- Attach quote or other enclosures to an order
- Fax or e-mail quotes or orders
- Distinguish between non-billable and billable orders

## ACTION PLANS/STRUCTURED AND SALES MODELS

- Define and assign an action plan to an opportunity
- Create different action plans to match your selling model
- Automated sales assistant feature to send messages, generate orders and create follow-ups

## LITERATURE FULFILLMENT

- Store key documents that can be sent electronically or by regular mail
- Place non-billable orders when sending literature
- Create collections of documents and web pages

## KEEP IN TOUCH WITH YOUR PROSPECTS AND CUSTOMERS

- Alarmed follow-ups and to do's
- Microsoft Outlook/Word integration
- E-mail/fax messaging
- Template-based correspondence

Product	Description	Qty	Gross	Discount	Potential Rev.	Updated	LOB
API-001	Applications Progra...	1	\$ 5,391.00	\$ 0.00	\$ 5,391.00	2/22/2002	Software
CON-100	High-bandwidth ada...	1	\$ 4,491.00	\$ 0.00	\$ 4,491.00	2/22/2002	Hardware
PRIG-FLIGHT	Flight simulation fra...	1	\$ 6,291.00	\$ 0.00	\$ 6,291.00	2/22/2002	Software
SPIV-016	Advanced VR server	1	\$ 13,499.10	\$ 0.00	\$ 13,499.10	2/22/2002	Hardware
TER-005	Immersive user termi...	1	\$ 1,799.10	\$ 0.00	\$ 1,799.10	2/22/2002	Hardware

All information related to a sales opportunity is available in a single place, providing sales reps with instant access to all relevant data, making them more efficient and effective.

## Designed for the Customer-Centric Enterprise

Sales and Marketing makes it easier to pinpoint prospects and win more business. Your business flow is simplified, because everyone's using the same tool to interact with customers. Whether it's a presales marketing campaign, working a sales opportunity or providing post-sales support, your enterprise and your customers are kept informed.

## About Epicor and Epicor Clientele

Epicor Software Corporation has long been a recognized leader in building world-class applications. Epicor Clientele is no exception. Consisting of a number of modules, including Sales and Marketing, Epicor Clientele can help you effectively manage your customer relationships. For more information on Epicor Clientele, contact your authorized Epicor Partner or call Epicor at 800-997-7528, or visit us on the Web at [www.epicor.com](http://www.epicor.com).



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