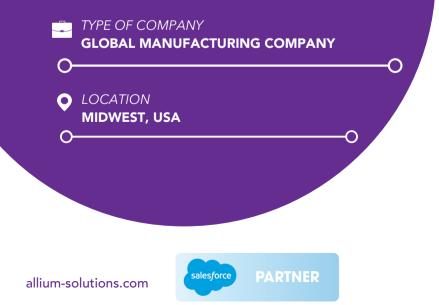
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CUSTOMER STORY

Our international manufacturing customer needed to modernize their automation processes to better engage and empower Sales. Allium performed a bi-directional integration with Epicor, creating full pipeline visibility, better tracking capabilities and essential reporting for Reps.



CHALLENGE

The customer had no CRM in place and was managing their Sales process using Epicor ERP. Customer painpoints included:

- Limited forecasting: Pipeline data only visible when Sales actually quotes
- Unable to get a holistic view of their Opportunity pipeline
- No reporting on pipeline, conversion rate, average sale, or Rep production
- Inability to track actions and communications across sales channels
- Multiple Epicor companies none integrated with Salesforce
- Difficulty navigating Epicor interface for Sales Reps and team

ACTION

The customer used Epicor as a "lite" CRM, so Allium set up Salesforce and conducted a bi-directional integration with Epicor for tracking of pre-Sale/Prospecting activities and Opportunity pipeline.

Built Opportunity Sales process using Salesforce Integrated Salesforce and Epicor Accounts, Contacts, Products, Quotes, and Order







Allium

200 River Pl Suite 230 Madison, WI 53716



(262) 798-5100 allium-solutions.com

RESULT

Epicor-to-Salesforce integration created streamlined processes for Sales — from Lead to Opportunity management — enabling more visibility, improved communication, and enhanced forecasting and tracking capabilities.

