



CUSTOMER STORY

Struggling to make the most of Epicor? Allium helped our major manufacturing customer take on an Epicor-Salesforce Service Cloud integration to enhance their pipeline visibility, improve usability for Sales Reps, and activate essential reporting to optimize the Sales process.



TYPE OF COMPANY

GLOBAL MANUFACTURING COMPANY



LOCATION

MIDWEST, USA



CHALLENGE

The customer struggled to modernize their Opportunity Management processes due to limitations with Epicor. Customer painpoints included:

- Trouble effectively managing contacts; solely using Outlook
- No visibility into their sales pipeline or opportunity stages
- Epicor interface extremely difficult to navigate for Sales Reps and Mobile Workforce
- Multiple Epicor companies, each requiring need for Salesforce integration

ACTION

Allium connected Salesforce and Epicor to build a smarter, more transparent Sales process and improve pipeline visibility. We developed a better reporting dashboard, including easy access to essential data — for both Sales Reps and their mobile team out in the field.

1

Built Opportunity Sales process using Salesforce

2

Integrated Salesforce and Epicor Accounts, Contacts, Products, Quotes, and Orders

3

Built out management reporting/dashboards for visibility into their business



RESULT

Enhanced pipeline visibility and in turn, a more empowered Sales team and mobile workforce. Streamlined processes and data access — enabling more visibility, improved collaboration and better usability for employees across the board.

VISIBILITY



- Full pipeline visibility
- Epicor-Salesforce integration enabled new, necessary visibility for senior management

REPORTING



- More insight from new reporting processes and dashboards
- Better, more accurate tracking of relevant info
- Senior management now leverages Salesforce reporting to run their business

INTEGRATION



- Salesforce Service Cloud integration eliminated Epicor visits for Sales Reps.
- Ease-of-Use for Sales Reps and mobile workforce
- Increased productivity and elimination of silos

Allium



5-STAR CUSTOMER RATING

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