

Heitek Automation Gets Value Out of Available Data & Reports Thanks to SYNC

Commercient Integrates Epicor Prophet 21
and Zoho CRM





Heitek, based in Phoenix, Arizona, is the best resource for industrial automation components and solutions from a complete portfolio of premier manufacturers. Strengthening this offering is their application consulting, system design, fulfillment and support services that create a breadth of capabilities which are unmatched in their region.

LOCATION	<i>Phoenix, AZ</i>
EMPLOYEES	<i>51 - 60</i>
INDUSTRY	<i>Regional Distributor of Industrial Automation Products and Manufacturer of Control Panels</i>
ERP & CRM	<i>Epicor Prophet 21 & Zoho CRM</i>
CUSTOMER BUSINESS MODEL (B2B, B2C, or Both)	<i>B2B</i>
SOLUTION(S)	<i>Commercient SYNC</i>
GO LIVE DATE	<i>Spring 2019</i>

CHALLENGE	SOLUTIONS	RESULTS
<p>Heitek Automation needed to move to a new CRM that is a more powerful, cloud-based solution</p>	<p>Zoho CRM, a leading customer relationship management software</p>	<p>With Zoho CRM, user adoption increased, and they are no longer tied to an SQL server</p>
<p>Data between their Epicor P21 and Zoho CRM remained siloed</p>	<p>Commercient SYNC, the #1 data integration platform for sales</p>	<p>ERP data can be accessed directly in CRM, including customer information, sales history, invoicing, serial numbers invoiced, inventory, multi ship to addresses and more</p>
<p>The sales team at Heitek need easy access to key data, such as open orders, receivables, payables, etc.</p>	<p>SYNC integrates specific sales data from Epicor P21 to Zoho CRM</p>	<p>Heitek has a 360-degree view of sales and customers</p>

NOTES

- **Heitek Automation, based in Phoenix, Arizona, is the leading resource for industrial automation components and solutions, from a complete portfolio of premier manufacturers.** They use Epicor Prophet 21 to manage their operations and finances.
- Previously, the business was using Tour de Force as their CRM solution, but it was tied to an SQL server. They chose **Zoho CRM as a replacement, thanks to its powerful features, user-friendly interface, is cloud-based and has a mobile-friendly app.** As a result, user adoption has increased.
- However, data within Epicor P21 and Zoho CRM remained siloed, and not easily accessible. Heitek decided to leverage **Commercient SYNC, the #1 data integration platform for sales, to integrate their ERP and CRM.**

RESULTS

- Heitek Automation knew that having **key data integrated from Epicor Prophet 21 to Zoho CRM was important**. They had a similar integration with their previous CRM. “There’s a lot of value in that [P21] data that we had,” said Scott Heiling, President of Heitek. “And that's why we took a look at Commercient to set up that integration.”
- The sales team had **access to Epicor Prophet 21 data within Zoho CRM, including customer information, sales history, invoicing, open orders, serial numbers invoiced, inventory, multi ship to addresses, and much more**. This gives Heitek Automation a 360-degree view of sales and customers
- As far as the most important data being integrated, Heiling commented, “**We're bringing over the order data right now, so there's value on open order reports, the accounts receivable side of things, and payables.**”

ABOUT COMMERCIENT



Commercient SYNC makes ERP and CRM data integration simple, quick, and efficient. Over the years we've helped companies of all sizes integrate their ERP data with their CRM system, helping businesses become more efficient.

Our SYNC integration has grown to over 85 systems, including Sage, QuickBooks, Acumatica, Epicor, SAP, SYSPRO and many others. With our ERP and CRM integrations, your data is synced to both systems in real time without the need for manual data entry, or the risk of human errors.

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