



Inscop Distributing Enhances Their Marketing Strategies and Customer Data with SYNC

Commercient Integrates Epicor P21 and Zoho Enterprise CRM



HVAC Equipment



HVAC/R Parts



Motors



Refrigeration



Supplies



Testing, Tools & Training



Thermostats



Ventilation & IAQ



COMPANY PROFILE

Wholesale distributor of Heating, Ventilation, Air Conditioning & Refrigeration equipment, parts and supplies. Inscoprom has been proudly serving the HVAC/R market for over 60 years with 35 branches in both Texas and Oklahoma. Inscoprom distributes Ruud residential and commercial equipment throughout most of Texas and Oklahoma City, and the York product line in the greater Houston market. Inscoprom also distributes Mitsubishi ductless technology throughout all of our locations.

LOCATION	San Antonio, TX
EMPLOYEES	151 - 200
INDUSTRY	Distribution
ERP & CRM	Epicor P21 & Zoho Enterprise CRM
CUSTOMER BUSINESS MODEL (B2B, B2C, or Both)	B2B
SOLUTION(S)	Commercient SYNC
GO LIVE DATE	Fall 2019

CHALLENGE	SOLUTIONS	RESULTS
Insko Distributing needed a powerful CRM system	Mark Burgener recommended Zoho Enterprise CRM	Zoho CRM is a powerful and easy-to-use software
They needed a CRM integration with Epicor P21 for funnel management	Commercient SYNC, the #1 data integration platform for sales	Sales pipeline and reports are accessed in CRM
Insko Distributing wanted to leverage their marketing efforts	Commercient provides a one-way SYNC	They know which programs customers are enrolled in to target their marketing more effectively

NOTES

- **Insko Distributing has been a wholesale distributor of Heating, Ventilation, Air Conditioning & Refrigeration equipment, parts and supplies for over 60 years.** They were using Epicor P21 to manage data, but they needed a CRM in place to help their marketing team make decisions.
- As Tammy Brady, Marketing Coordinator at Insko Distributing explained, they have dealer programs that their customers are enrolled in, and, “it's really been a hassle, kind of trying to keep track of who's enrolled in what, who qualifies for which programs. **My ‘CRM’ is using Excel Online, but it's really not functioning how we would like it to be.**”
- Mark Burgener at Zoho recommended both Zoho Enterprise CRM and Commercient SYNC to integrate Epicor P21 and their new CRM. “They had big on their list an integration point with Epicor P21. And as the account manager I **recommended Commercient being that they have provided so many integrations to Zoho over the years,**” he said.

RESULTS

- With Commerciant SYNC, Insko Distributing has a 360-degree view of **marketing and customers**. “We're excited to have all of our information in Zoho, to be able to use the product how it was meant. And we're excited to be able to dive in deeper to **all the details and customer information that is provided and take steps forward in that area**,” Brady said.
- Brady explained: “Right now we're mostly going to use it for marketing purposes, trying to **capture what programs our customers are enrolled in** and trying to keep track of business that way so that **we can really target our marketing**.”
- They plan to get the Sales team involved later on in the project to **move sales orders and other operations to Zoho**. “Your integration specifically touches the CRM side of this, but they're also using our ticketing system, Zoho desk, and Zoho reports, which is another reason that these native modules are so meaningful to their operation,” said Burgener.

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 65 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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