



Commercient SYNC's Epicor P21 & Salesforce Data, Improving Sales & Marketing

Commercient SYNC Integrates Epicor P21 & Salesforce Professional

“SYNC provides the sales reps with relevant data, helping to improve sales numbers.”

“Sales reps out on the road can see what a customer has ordered in the past, thanks to SYNC.”

CHALLENGES	SOLUTIONS	RESULTS
<p>Replace a previous CRM with a state-of-the-art solution</p>	<p>Salesforce, the world's leading cloud-based CRM</p>	<p>Filter Sales & Service can better track the sales pipeline and opportunities</p>
<p>The sales team didn't have an easy way to access Epicor P21 data</p>	<p>Commerciant SYNC, the #1 data integration platform for sales</p>	<p>Sales reps can access contacts, order history, and more, directly in Salesforce</p>
<p>Create an integration from CRM to ERP</p>	<p>Commerciant's Phase 2 SYNC</p>	<p>New and updated contacts created in Salesforce are SYNC'd to Epicor P21</p>

Detailed Info and Quantitative Results

“**SYNC provides the sales reps with an easy way to get the information that is relevant to them and helps improve their sales numbers and touch points with customers,**” said Jackie Clarkson, Operations and Process Improvement Manager at Filter Sales & Service.

The company utilizes **Epicor P21** for accounting and operations, and replaced a previous CRM with **Salesforce Professional** which also modernized their sales processes. Additionally the previous CRM couldn't 'talk to' Epicor P21.

“**We build our opportunities and pipelines through Salesforce,**” explained Leo Lake, Sales and Business Development Manager, “**and track where projects are in the pipeline, where they are in the opportunities, and really drill down to the reps' territories.**”

Filter Sales chose **Commercient SYNC**, the #1 data integration platform for sales, to connect to free their Epicor P21 and Salesforce data and also improve reporting.

Detailed Info and Quantitative Results

Filter Sales & Service can access Epicor P21 data in Salesforce Professional, including **customer information, orders, contacts, accounting, invoicing, customer movement history, salesperson names, AR terms, AR territory, and much more.**

“If our sales team is out on the road and they need to **look up what a customer ordered recently or specific contact information, they can easily see that in the Salesforce app thanks to SYNC,**” said Leo Lake.

“Our sales team can use that **SYNC'd Epicor P21 data and filter contacts and industries, and send out email blasts,**” continued Lake. “For example, **they can email customers in the health industry about specific products that may interest them.**”

Additionally, **new and updated contacts created in Salesforce Professional are SYNC'd by Commercient to Epicor P21,** saving time by eliminating double data entry and errors by ensuring data accuracy.



Company Profile



Filter Sales is the leader in air filtration and was founded in 1953 as a service organization and today maintains a highly trained service department. Preventive maintenance filter service programs, filter bank repair and upgrades, clean room audits, ductwork video inspections, and IAQ investigations are just a few of our services. With increasing concern about indoor air quality and reduced maintenance staff, many customers rely on Filter Sales' trained service technicians to supply a filter program that yields accurate system surveys, engineered filter selection and application, optimum service schedules and documentation to support their customers' preventive maintenance program. Filter Sales' Commitment to Quality set guidelines and performance standards for all employees and departments.

LOCATION	<i>Massachusetts & Connecticut</i>
EMPLOYEES	<i>50+</i>
INDUSTRY	<i>Manufacturing & Distribution</i>
Customer Business Model (B2B, B2C, or Both)	<i>B2B</i>
SOLUTION(S)	<i>Commercient SYNC</i>
ERP & CRM	<i>Epicor P21 & Salesforce Professional</i>
GO LIVE DATE	<i>2019</i>

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 150 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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