

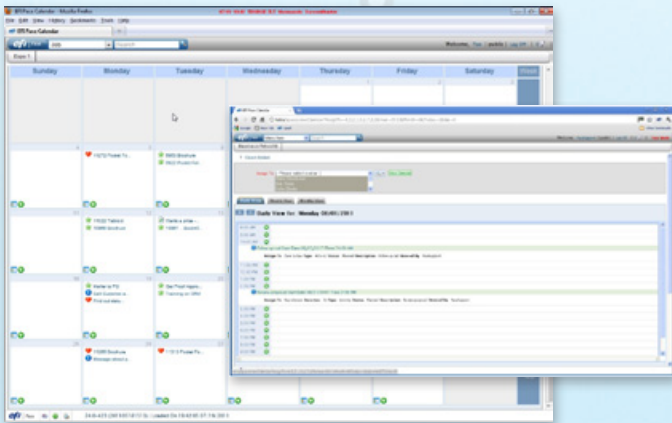
# EFI Pace Customer Relationship Management (CRM)

## Get the most from your MIS/ERP solution by offering world class services.

The EFI™ Pace Customer Relationship Management (CRM) add-on module offers you the ability to track and manage customer and prospect relationship opportunities and activities, and internal campaigns. This add-on module includes calendar views of activities and reporting options so you can maximize the effectiveness of your sales team. It offers the following features and benefits:

**Record and monitor sales activities and opportunities related to all accounts in the system.**

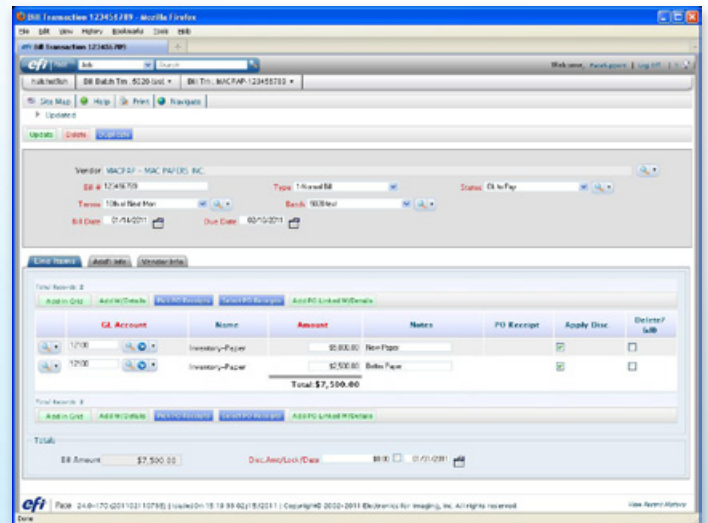
The CRM module enables you to enter user-defined sales activities such as meetings, travel, and phone calls for individual contacts and accounts. All activities and planned items appear on the integrated, real-time CRM calendar for easy reference and tracking. You can also enter and track various opportunities to do business with a specific company so that your sales team can become more effective.



Daily, Weekly and Monthly Calendar Views

**Integrated with existing modules to maximize effectiveness.**

The CRM module is integrated with other modules in the Pace™ system. For example, you can add CRM sales activities and opportunities from the cost-based Estimating module, and link Pace quotes to the CRM module. You can also use accounts you set up in CRM to create jobs or move jobs into production in Pace. In addition, you can use the CRM module with PaceStation (EPS) to create custom inquiries and sort, manage, and manipulate CRM and other Pace data.\*



View Sales Opportunity Detail

**Track notes and campaigns for marketing with budget and expected costs for each campaign.**

You can add sales campaigns in CRM, which enable you to plan sales or marketing projects at a high level, and then link campaigns to various activities. When you set up your sales campaigns in CRM, you can include budget amounts, expected revenue, and expected costs. You can also add notes for reporting purposes with attachments.

\*Available Q2 2012

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### Track both prospect and customer activity.

With the CRM module, you can track your current customer activity as well as the activities of your prospective customers. You can also view only those activities tied to a specific customer contact or prospect account, and group similar accounts as necessary.



For more information contact EFI at 1-800-875-9117 or visit [www.efi.com/pace](http://www.efi.com/pace)

EFI's portfolio of integrated solutions increases productivity and improves your bottom line.

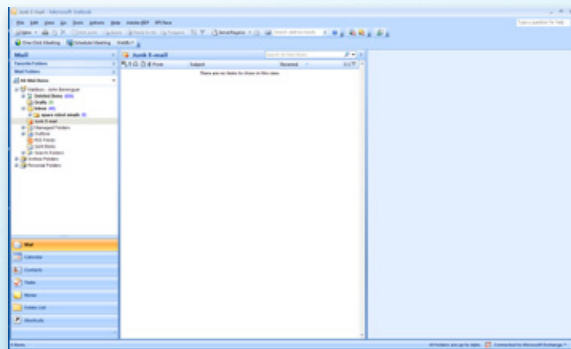
Find out more at [www.efi.com](http://www.efi.com).

### Generate sales activity and custom reports.

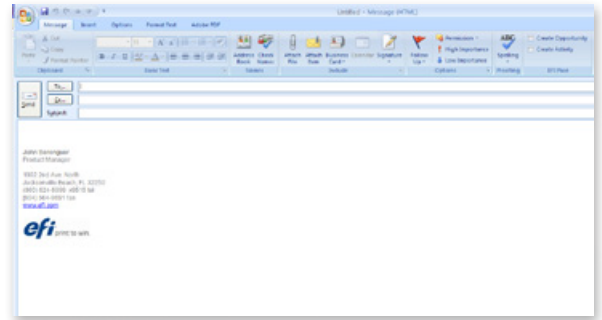
With the CRM module, you can generate sales activity reports for a specific date or date range, and sort the reports by salesperson, activity, and opportunity. In addition, CRM includes opportunity reports and a campaign list report, which are sorted by your report preferences. You can also use the CRM module with the Custom Report Writer add-on module to produce custom presentation-quality sales reports both internally and through web-based reporting.

### Licensable add-on Feature Available

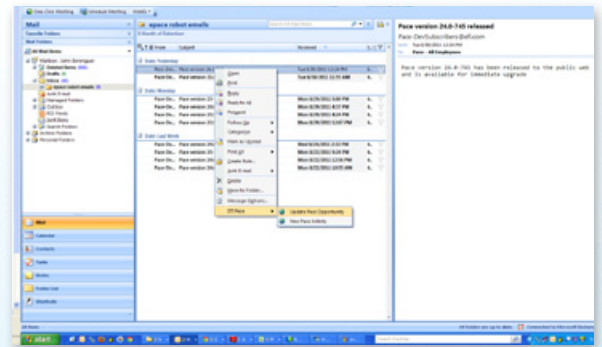
The new CRM Outlook Plug-in is a licensable add-on feature available in version 24. This feature requires MS Outlook 2007 or higher. The plug-in allows a MS Outlook user to automatically create/modify CRM Opportunities and/or CRM Activities from an email, task or calendar entry. Any CRM activities created from Outlook are automatically placed on the CRM Calendar saving the salesperson duplicate entry efforts.



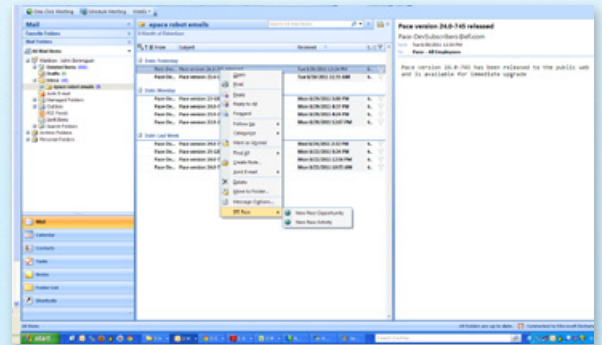
The Outlook menu now has an additional option for EFI Pace.



A new email has two new "check box" options in the top right corner – Create Opportunity and Create Activity



By right clicking on an existing email, task or calendar entry that HAS previously been associated to Pace, the ability to update the Pace CRM entry is displayed – Update Pace Opportunity



By right clicking on an existing email, task or calendar entry that HAS NOT previously been associated to Pace, two new EFI Pace options appear – New Pace Opportunity and New Pace Activity.



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