IFI Pace Customer Relationship Management (CRM)

Gain Instant Access to Key Information to Better Understand and Anticipate the Needs of Your Current and Potential Customers.

The 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.

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.

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.

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.

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.

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 Customer Report Writer add-on module to produce custom presentation-quality sales reports both internally and through web-based reporting.

Plug-In for Microsoft Outlook
The Pace Outlook Plugin lets you create Pace CRM opportunities and/or activities from within an Outlook email, task or calendar entry. The plug-in supports Outlook 2007 and 2010 (Windows only) with one-way communication from Outlook to Pace.
BUSINESS AUTOMATION SOFTWARE FOR PRINT AND PACKAGING

EFI Pace Customer Relationship Management (CRM)

For more information about EFI Pace Customer Relationship Management (CRM), please visit www.efi.com/pace or call 1-800-875-7117.

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