Mobilize customer and activity information.

Keep your sales force informed and agile with familiar and intuitive mobile tools. EFI CRM helps you maximize the value of your customer and prospect relationships.

**Mobile Knowledge is Power**

EFI CRM holds company and contact information from your EFI MIS/ERP system in one, consolidated location to give you a mobile, 360 degree view of your business. Whether using computers, iPads or iPhones, your mobile employees will have information at their fingertips, even without a data connection.

**Manage Activities, Opportunities and Customer Complaints**

Visits, calls, emails, and other activities can be recorded and tracked. The software also contains to-do list functionality and a filter for viewing contacts with overdue activities using the iOS interface.

Sales opportunities can also be created, tracked, and revised with value and percentage chances of conversion. Activity and opportunity information can be exported to Excel via the CRM’s browser user interface (permission restricted).

Users can also record and submit customer complaints and set follow-up actions and responses using the browser interface.

**Manage Email Campaigns**

Using the browser interface, users can send HTML emails to defined campaigns. HTML templates can be designed or imported and email opens and clicks can be automatically tracked per recipient with optional follow-up activities for salespeople.
**Integrated Information**

Mobile CRM users and MIS/ERP users gain access to the same information. With connections and permissions set by system administrators, users can also sync EFI CRM to their local applications:

- **Emails**: Store correspondence from your local email application as CRM notes against contacts.
- **Calendars**: Create appointments in your local calendar application when creating CRM activities. You can also create a CRM activity when creating a calendar appointment simply by inviting the CRM.
- **Contacts**: Update your local contact application when a contact is updated in the CRM. You can also update or create a new CRM contact simply by sharing details with the CRM.
- **RSS and Twitter**: Automatically store RSS and Twitter feeds as company-level CRM notes.

**Key Benefits**

- Make the most of every customer interaction.
- Differentiate through better customer service.
- Win more business through accelerated responses to RFQs.
- Ensure accessible, accurate information.
- Allow salespeople to better manage their time and focus.
- Streamline operations by removing touch points and consolidating information.
- Create a more informed, agile, and responsive organization.
- Ensure quick adoption with a program that is easy to learn and use.

EFI fuels success.

From Fiery to super wide inkjet, from the lowest cost per label to the most automated business processes, EFI has everything your company needs to succeed. Visit www.efi.com or call 800-875-7117 for more information.