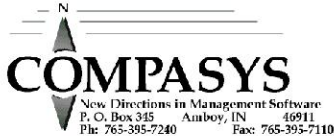


E3i - Compasys Interface for Epicor 9®, Exchange Server® Email Integration

Optional Feature



Email has become one of the most important types of business communication. As a result, documenting and linking incoming and outgoing emails to customers is a critical aspect of the customer relationship management function. The Compasys Interface for Epicor 9® and Microsoft Exchange Server allows Epicor 9® users to combine the powerful CRM features of Epicor 9® with the email management capabilities of Microsoft Exchange Server. The interface is compatible with Epicor 9® and above, and with Microsoft Exchange Server 2000 and up.

INTERFACE CAPABILITIES

The interface creates two new buttons on the Epicor 9® customer contact screen. The “Send Email” button loads the Microsoft Outlook email client and populates the email address with the email address recorded in Epicor 9® for that contact. The email can then be completed and sent to the contact, with or without attachments using the normal features of Outlook. The second new button, titled “EM History”, will allow the user to view, and access all emails to and from that contact email address, whether they were originated from Vantage or not.

The screenshot displays the 'Customer Maintenance' window for a contact named Andrew Addison. The interface includes several tabs: Customer, Billing, Contacts (selected), Attributes, Ship To, and EDI. Under the 'Contacts' tab, there are sub-tabs: Detail (selected), List, Mailing Address, Name Detail, Comments, and Attributes. The 'Contact Information' section contains fields for Name (Andrew Addison), Function (VP), Role (Vice President), Title, Reports To, and Email (andrewa@salesdemo.mfgdemo.com). A 'Global' button is present. The 'Status' section has checkboxes for 'No Contact' and 'Inactive'. The 'Primary Contact' section has checkboxes for 'Billing' (checked), 'Purchasing', and 'Shipping'. The 'Phone / Fax' section includes fields for Phone (503-555-5556), Cell Phone, and Fax (503-555-5556), along with buttons for 'Send Email' and 'EM History'. The 'Customer Connect' section has a 'Web User' checkbox (checked) and a 'Clear Password' button, and a 'Show Input Price On Web' checkbox (unchecked).