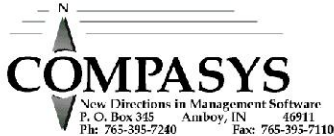


E3i - Compasys Interface for Epicor 9®, Exchange Server® Email Integration

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' interface for a contact named Andrew Addison. The interface is organized into several sections:

- Customer Maintenance** (Title Bar)
- Navigation Tabs:** Customer, Billing, **Contacts**, Attributes, Ship To, EDI
- Sub-Navigation Tabs:** Detail, List, Mailing Address, Name Detail, Comments, Attributes
- Contact Information:**
 - Name: Andrew Addison
 - Function: VP
 - Role: Vice President (dropdown menu)
 - Title: (empty field)
 - Reports To: (empty field)
 - Email: andrewa@salesdemo.mfgdemo.com
 - Status: Global (green button)
 - Status options: No Contact (checkbox), Inactive (checkbox)
 - Primary Contact options: Billing (checked checkbox), Purchasing (checkbox), Shipping (checkbox)
- Phone / Fax:**
 - Phone: 503-555-5556 (Send Email button)
 - Cell Phone: (empty field)
 - Fax: 503-555-5556 (EM History button)
 - Pager: (empty field)
 - Home: (empty field)
 - Alternate: (empty field)
- Customer Connect:**
 - Web User: (checked checkbox) (Clear Password button)
 - Show Input Price On Web: (checkbox)