



Epicor Success Story

The Tool Crib, Inc.

Epicor Integrated Forms Design helps provide personalized touch

Company Facts

- ▶ Location: Knoxville, Tennessee
- ▶ Industry: Industrial
- ▶ Number of Employees: 22
- ▶ Web site: www.toolcrib.com



Success Highlights

Challenges

- ▶ Help a Knoxville, Tennessee-based tools wholesaler offer personalized customer service

Solution

- ▶ Epicor Integrated Forms Design

Benefits

- ▶ Eliminated printing and programming costs
- ▶ Created high-quality, professional forms
- ▶ Produced customer-specific forms
- ▶ Improved customer service

You never get a second chance to make a first impression.

Imagine that you are vying for the business of a large account, for which you will provide service and materials for years to come. Now imagine that a competitor has entered a quote with the same prospect, for the same service and material contract. You offer the same items and services at competitive prices, so what sets you apart? What will drive the prospective customer to either choose or reject your quote?

The answer may not be what the quote contained, but how it was presented. If you fax the prospect a generic, largely handwritten quote, you will be selling yourself short, while giving your competition the advantage. Conversely, if you send the prospect a professional, computer-generated quote that clearly displays each item, its cost, and any related information—along with your logo and contact information—you may have just the edge you need.

To help you gain the competitive edge, Epicor offers the Integrated Forms Design solution. This solution allows you to freely design and customize all of your commonly used forms, such as invoices, quotes, and purchase orders, in a look and feel that best fits your business needs. The integrated forms solution allows you to create high-quality, professional forms that eliminate printing and programming expenses, while personalizing customer service.

Flexible customization

Using the comprehensive graphical design features inherent in the forms design solution, you have the ability to create electronic replicas of your paper forms, and customize forms to fit your business needs—without paying for custom programming.

The forms design solution comes standard with a series of boilerplate forms, which serve as the templates from which each form will be created. The boilerplates streamline form design by offering separate templates for pages with company and customer information, line items, and mathematical calculations.

This intuitive structure lets you simply drag information such as your company logo and customer address into one field, and line items and subtotals on another. Since the forms package is fully integrated with your Epicor solution, exporting and manipulating data does not require expensive code changes or hours of additional labor.

Form templates give you the flexibility to add personalized touches to your forms, including bar codes, automated signatures, and customer-specific messaging, to portray a high level of professionalism and customer service.

For Michelle Vaught, system administrator of The Tool Crib, Inc., a Knoxville, TN-based tools wholesaler, integrated forms provide the personalized service and visibility necessary for success. “We wanted to offer a personalized touch that our generic forms could not provide,” she says. “Our customized forms put all of the necessary information at the customers’ fingertips.”

Integrated output

The forms solution’s output options help you improve customer service by allowing you to customize the delivery methods on a job-by-job basis. With integrated fax and e-mail capabilities, the forms solution helps you reach customers in an efficient and cost-effective manner. Since integrated faxing and e-mailing is an entirely paperless process, you cut printing, labor, and maintenance costs, as well as the time it takes to execute these activities.

Vaught sees these delivery options as yet another way to provide personalized service to Tool Crib’s customers. “We are able to offer our forms in the best possible format to fit our customers’ needs, which includes sending them via fax, e-mail, or however they choose to receive them,” she says. “Custom forms have become one of our company’s signature services.”

About Encompass

Encompass Solutions is a business and software consulting firm that specializes in ERP systems, EDI, and Managed Services support for Manufacturers and Distributors. Serving small and medium-sized businesses since 2001, Encompass has helped modernize operations and automate processes for hundreds of customers across the globe. Whether undertaking full-scale implementation, integration, and renovation of existing systems, Encompass provides a specialized approach to every client’s needs. By identifying customer requirements and addressing them with the right solutions, we ensure our clients are equipped to match the pace of Industry.

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