Customer Relationship Management (CRM)

Feature

Build stronger relationships, track every interaction, and stay one step ahead—with clarity and care

Epic's **CRM** feature gives organisations a centralised, mobile-enabled platform to manage customer, supplier, and stakeholder relationships. It replaces scattered notes and inbox searches with structured profiles, automated interaction logs, and smart reminders—ensuring every touchpoint is tracked, every issue is flagged, and every opportunity is nurtured.

Whether you're managing sales pipelines, supplier engagement, or event coordination, this feature turns relationship data into strategic insight.

Key Functions

- Comprehensive Contact Profiles: Create and manage detailed records for customers, suppliers, and other stakeholders. Add contact info, company affiliation, physical address (with auto-generated Google Maps), and attach relevant documents like contracts or reports.
- Interaction Tracking & Frequency Alerts: Log every interaction—emails, calls, meetings—with automatic updates when emailing directly from Epic. Set interaction frequency targets per contact, and monitor status via a Red-Amber-Green dashboard to ensure no relationship goes cold.
- Reminders & Issue Flagging: Set follow-up reminders and flag unresolved issues. Managers can view outstanding items across all contacts—supporting proactive service and accountability.
- Group Communication & CRM Emailing: Create CRM Groups to send bulk emails to selected contacts. Each message is automatically logged as an interaction on every recipient's profile.
- Weekly Report Generator: Staff can quickly add weekly notes per customer, and managers can download a consolidated report—saving time and improving visibility across teams.
- Manager Subscriptions: Managers can subscribe to specific customer interactions and receive email notifications—ideal for oversight and strategic follow-through.
- Brochure & Event Tools: Generate professional-looking brochures or delegate packs for meetings and conferences. Include attendee bios and contact info to support networking and post-event engagement.
- Mobile App Enabled: Access and update CRM records on the go—perfect for sales reps, account managers, and field teams.