Sage 100 ERP

Sage CRM

Increased Productivity, Enhanced Marketing, Improved Customer Experience

Sage CRM is a powerful and easy to use Customer Relationship Management (CRM) solution that increases productivity, fosters collaboration, and improves the customer experience. As an integrated solution, Sage CRM leverages the transactional information in your Sage 100 ERP system to present a comprehensive and detailed view of your customers' business and their needs.

Increase productivity by providing your sales team a streamlined sales and planning process thanks to easy to use workflow management supported by detailed customer information available anytime, anywhere. Enhance your marketing activities by creating effective campaigns with built-in e-marketing tools, a detailed knowledge base, and multiple social media channels. Improve your customer experience by empowering your service staff with easy to use and customize dashboards, self-service features, and performance monitoring. This powerful combination of ERP and CRM functionality delivers instant access across the whole organization to key real-time customer information and allows collaboration for greater organizational efficiency, higher sales, and better overall customer experience.

Sales Force Automation

Sage CRM offers a wealth of features that optimize sales opportunities, increase productivity, and drive performance with automated workflow and pipeline management. Through its customizable and interactive dashboard view, Sage CRM maximizes your sales activities by giving you instant access from your desktop or mobile device to current opportunities, leads, calendar, sales performance, contacts, financials, and much more. Sage CRM also gives you the ability to check product availability, order status, and billing status.

Marketing Automation

Sage CRM enhances your marketing efforts by allowing users to build effective campaigns based on detailed customer information from Sage 100 ERP such as buying trends, products purchased, and target markets. Using Sage CRM marketing features, marketing professionals can design compelling promotions that lead to higher response rates, more and better quality leads, and increased sales opportunities. With Sage CRM's built-in analytics tools, you can analyze conversion rates and accurately calculate your ROI.

Customer Service

Sage CRM empowers your customer service staff by providing them with complete customer information from both the front and back end office systems and enabling them to make the right informed decisions to resolve the problem. From a single central source, your staff can easily view real-time order status, past service notes, invoices, payment history, credit status, and more, which can then deliver consistent and accurate customer service.

BENEFITS

- **Increase your sales wins** through better organization and contact tracking by using the in-depth dashboard, opportunity, forecast and lead management tool
- **Improve sales productivity** with automated sales process workflow and Sage CRM mobile access
- **Maximize your sales opportunities** by gaining greater insight into your customer's business and identifying their underlying needs
- **Increase sales efficiency** with sales templates and exchange server integration
- **Create, track and manage effective marketing campaigns** by leveraging Sage ERP knowledge base
- **Execute and manage targeted email campaigns** that return better results with built-in e-marketing tools
- **Calculate ROI and optimize marketing spend** by analyzing campaign conversion rates
- **Improve your knowledge** by leveraging multiple integrated social media channels to better understand, track and communicate with customers
- **Increase customer retention** and loyalty by empowering them with self-service features
- **Increase customer response time** and call resolution with instant access to real-time information
- **Improve quality of customer service calls** with well-informed and empowered staff
- **Deliver consistent and accurate customer service** with a single central information source

Features

Contact Management	Improve collaboration across your company by organizing and consolidating your customer information into a single source. Export when needed to various formats (Excel, PDF, etc.) for additional analysis.
Group Management	Increase opportunities and sales coverage by assigning tasks to individual sales team members and tracking their progress. Maintain sales focus and consistency with group communication tools.
Document and Library Management	Increase efficiency by managing your customer documentation (quotes, fax, RFP's, etc.). Select and upload multiple files, attach multiple files to a single task, sort, view and open from a document and task list. Optimize your library storage by filtering, sorting and deleting unnecessary items.
Interactive Customizable Dashboard	Improve your sales team's performance and develop better customer knowledge by customizing the interactive dashboard workspace. Sales can monitor their opportunities, track their pipeline, and manage their daily, weekly and monthly activities. Utilize analytical tools to identify cross- and up-selling opportunities, and create graphical reports and charts for accurate business insight.
Sales Force Management	Boost your sales productivity by automating your management of pipeline and opportunities, forecasting, and quotes and orders. Maintain product and price list, and manage sales teams and territory.
Marketing Automation	Increase conversion rates and deliver effective campaigns by leveraging existing customer information. Utilize tools to plan, create, execute and measure the success of each campaign. Automatically track all email interactions including open, click and bounce rates.
E-Marketing	Increase leads by using attention-grabbing email marketing templates with smart-sending features. Design automated drip-marketing campaigns for consistent execution and optimum reach. Craft targeted emails campaigns from a specific group of prospects or customers and generate sales call lists based on campaign results.
Marketing Analytics and Reporting	Optimize your budget spend by calculating ROI at all stages of your marketing campaign cycle. Conveniently view the results on the interactive dashboard.
Social Media Integration	Increase revenue and strengthen your brand recognition by enabling users to engage collaboratively with prospects and customers in order to generate leads, communicate, and gain knowledge with integrated social media applications such as LinkedIn and Twitter.
Customer Self-Service	Improve customer loyalty and retention by empowering customer with web-based self-service features so they can check on their own needs, track their cases, update information, and request assistance when needed.
Customer Service Automation	Increase call resolution and improve your service quality by making every interaction quick and effective with the easy to use dashboard feature. View and communicate using real-time information, maintain accurate records for future use, and ensure proper escalation with predefined escalation workflow process.
Service Agent Management	Ensure quality and exemplary service by monitoring an agents' performance. Assess quantitative metrics such as case volume and qualitative metrics such as overall customer satisfaction for coaching and motivating purposes.
Customer Service Reporting	Delight customers by providing them customized reports with detailed analysis on metrics such as call volume, case resolution times, and communications and follow-up statistics.
Email Integration	Save time and gain productivity by importing contacts from Microsoft Outlook® into Sage CRM. Easily synchronize tasks and appointments between Sage CRM and Microsoft Outlook®.
Mobile Access	Maximize productivity and provide visibility to real-time customer information by allowing anywhere access via iPhone®, Android® and Tablets devices.
Cross-browser Compatibility	Increase productivity by accessing Sage CRM using the latest browser versions (IE®, Safari®, Chrome®, Firefox®).

6561 Irvine Center Drive | Irvine, California 92618 | 866-530-7243 | **www.Sage100ERP.com**