

Sage CRM and Sage ERP

Powerful Integration



Your ERP system helps you manage the financial and operational aspects of your business. A customer relationship management (CRM) solution helps to establish a positive, consistent experience when customers interact with your company. Linking these powerful, complementary systems together creates new ways to increase customer satisfaction, improve cash flow, save time, and earn a better return on your investments in sales, marketing, and customer service activities.

Your ERP solution contains the transactional information about customer accounts such as order history, account status, shipping preferences, and even past customer complaints. A CRM solution offers the ability to translate that information into meaningful—and profitable—sales, marketing, and customer service actions that can enhance and simplify your customers' experiences with your business.

Having an integrated ERP and CRM system means it doesn't matter which system data comes from because you have a true single view of the customer. Sage CRM is a front-office system that centralizes all information about external marketing, manages the sales pipeline, automates customer service, tracks information about customers, as well as creates dashboards and reports on this data. Your Sage ERP system helps automate and manage back-office business activities, such as accounting, purchasing, collections, human resources, payroll, manufacturing, distribution, and more. When these two powerful systems are combined, your employees have access to all the information they need in order to provide customers with exceptional service, without delays. Sage CRM integrates with Sage ERP solutions out of the box, so your company can quickly and easily create seamless workflows between the front and back office. Sharing access to key customer information leads to better organizational efficiency, greater order accuracy, and improved communication between business departments—and with your customers.

Sales Force Automation

With Sage CRM and ERP integration, your sales team enjoys instant access to comprehensive customer information, including account information, order history, notes, shipping preferences, and more, combined with up-to-the-minute data about inventory levels, product descriptions, and order status.

Your sales staff can easily check the availability of stock across different locations and can check the real-time status of orders without having to log on to different systems or call someone in another department. Information from your Sage ERP system can be displayed directly on the interactive sales dashboard, equipping teams with the data to answer important presales questions, such as:

- What has this customer ordered before?
- Are we authorized to offer a discount?
- Is this account on hold for nonpayment?
- How does this customer prefer to receive communications?
- And more!

The benefits of integration don't stop on the sales floor. Sales executives command comprehensive views of the sales pipeline, with on-demand dashboards and easy-to-produce reports that present a single view of sales performance—regardless of where information resides. After the sale, operations run more smoothly as information flows seamlessly from sales to order processing, warehouse, shipping, and billing. Integration reduces the potential for order entry errors, misunderstanding, and delays. This faster, cleaner order-to-cash process can offer greater productivity and lower overall costs.

BENEFITS

- Delivers a single view of relevant and comprehensive information on the interactive dashboard
- Assists with performance management and motivates staff
- Eliminates manual/duplicated processes
- Improves team collaboration
- Decreases time spent on administrative tasks
- Monitors service performance against service level agreements (SLAs)
- Enables customer issues to be tracked and responded to, regardless of who answers the phone or receives the email
- Increases customer retention
- Decreases the cost of customer retention
- Captures feedback from customers on product or service issues
- Enables benchmarking/scorecarding of customer service operations on an ongoing basis
- Delivers detailed information on the lifetime value of customers and enables profitable customers to be easily identified
- Ability to identify and provide customized products/services to different customer segments
- Reduces administrative overhead and enables budget to be tracked and managed
- Improves transparency in the sales pipeline
- Enhances sales forecast accuracy
- Monitors progress against quota
- Enables quarterly sales performance monitoring
- Improved win/loss ratio
- Shortened sales cycles
- Increases prospect-to-customer conversion rate
- Delivers metrics on most valuable customers





- With Sage CRM, opportunities can be tracked in real time and assigned to members of the sales team to action accordingly.

Company	Account Name	ERP System	Credit Limit (GBP)	Balance (GBP)	On Hold
Deason South	Customer	sarah	50,000.00	45,000.00	
Deason	Supplier	sarah	100,000.00	95,000.00	✓
Deason Inc.	Supplier	sarah	55,000.00	15,000.00	
Deason Inc.	Customer	sarah	90,000.00	10,000.00	
Deason Inc.	Supplier	sarah	75,000.00	10,000.00	

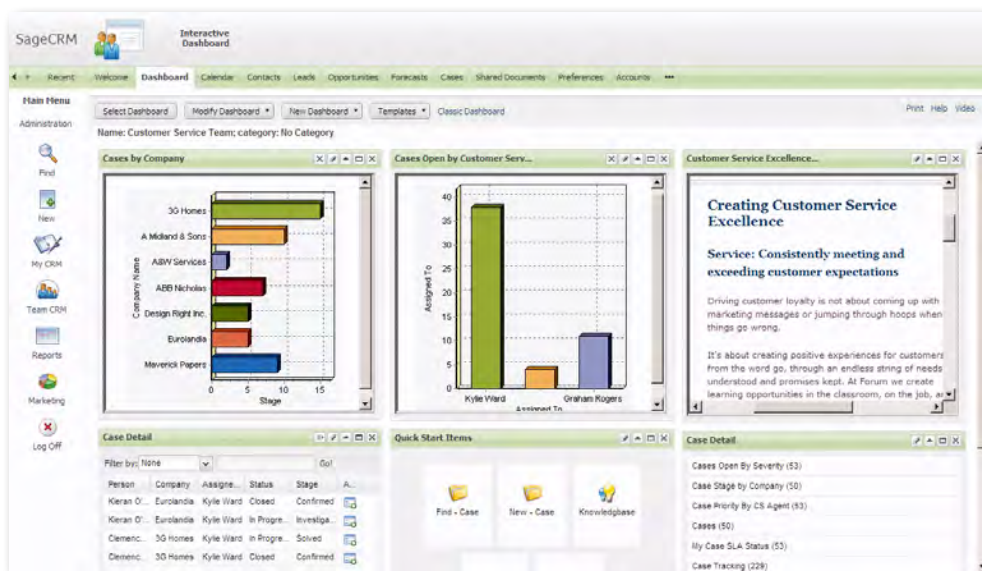
- With Sage ERP integration, marketing teams can leverage financial information to target their most profitable customer.

Better Return on Marketing Investment

The integration of Sage CRM and Sage ERP systems supplies your marketing team with greater insight into the customer base. Armed with knowledge about buying trends, suitable target markets, and other customer purchasing behavior, marketing professionals can design better promotional campaigns and offers. Finely tuned marketing programs can lead to higher response rates, new leads flowing to sales, and a higher lifetime value associated with each existing customer. Manage your company's marketing strategy with confidence using the winning combination of Sage ERP and Sage CRM solutions to:

- Gain better insight into the demographics and motivations of your customers.
- Discover what prospects want to buy and what price they are willing to pay.
- Create targeted campaigns and informed up-sell and cross-sell opportunities.
- Better nurture existing customers so they buy more products from your company.
- Use the most current customer lists to improve deliverability of marketing communications.
- More accurately calculate the exact ROI of marketing campaigns.

Return on marketing investment can be measured more accurately thanks to back-office integration. Integration between Sage CRM and ERP enables marketing staff to execute highly targeted campaigns based on customers' financial history and enables pin-point measurement of marketing ROI.



- Boost productivity among your customer service team with the interactive dashboard, an intuitive and customizable workspace from where they can manage all customer queries.

Outstanding Customer Service

The powerful combination of Sage ERP and CRM solutions provides your customer service staff with easy access to customer information from all areas of your business. Team members can quickly refer to the latest information using the interactive customer service dashboard. This true, single view of the customer empowers your customer service representatives with all of the information they need to make good decisions and resolve customer issues. Integration gives customer service representatives the right information to ensure consistent, exceptional service, including:

- Real-time status of orders.
- Availability of stock.
- Invoices.
- Customer payment history.
- Prior service notes.
- And more!

Automate your business processes to synchronize sales, marketing, and customer care activities across your organization. The prebuilt integration between Sage ERP and CRM solutions can help your company achieve an end-to-end business process that saves time, reduces errors and costs, and builds a better purchasing experience for your customers.

About Sage

Sage is a leading global supplier of business management software and services for small and mid-sized businesses. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs more than 12,600 people and supports more than 6 million customers worldwide. For more information about Sage in North America, please visit the company website at www.SageNorthAmerica.com. Follow Sage North America on Facebook, <http://www.facebook.com/SageNorthAmerica>, and Twitter, <http://twitter.com/#!/sagenamerica>.