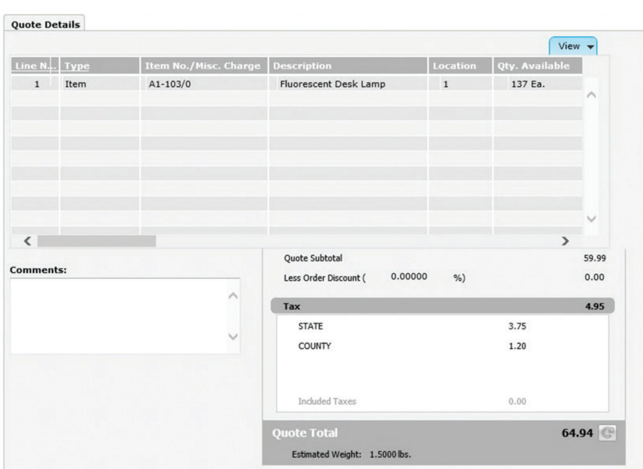
Sage CRM and Sage 300 ERP

Improved productivity
Stronger communications

When you integrate Sage CRM with Sage 300 ERP, your business benefits from end-to-end visibility and a single view of the customer, where each department is working with the same information and communicating in the same way. The result is greater insight into business performance, more efficient processes, improved productivity, and more effective communications, all of which open up new opportunities for growth:

- **Use a single source for all business contacts.** Improve collaboration and efficiencies across your company by organizing and consolidating ERP and CRM contact information—prospects, customers, and partners—into one reliable source.
- **Increase customer visibility.** Sage CRM provides employees across departments the single source of information they need to answer any customer question. Using Sage CRM, you can easily see the customer's call or payment history, order status, unresolved customer cases, quotes, and more.
- **Better manage supplier or partner relationships.** See or update information using Sage CRM screens such as purchase orders, payments, call history, and unresolved cases. Enable team members to respond to the needs of partners and suppliers within one system.
- **Eliminate duplicate data entry.** Increase efficiencies and eliminate errors by entering data once. For example, create new Sage 300 ERP accounts within Accounts Payable and Accounts Receivable using the information already available in Sage CRM.
- **Maintain control and data integrity.** Keep data synchronized between Sage CRM and Sage 300 ERP. Administrators define and control what each user can see or change within ERP and CRM—and what data is kept distinct versus shared between the two systems.
- **Streamline your processes.** Use Sage CRM to easily manage the required and unique activities for onboarding new customers and suppliers such as credit checks, references, and contact introductions. Updates are then available in both Sage CRM and Sage 300 ERP.



This screen shows how quotes can be created within Sage CRM.

> "Our old way of doing things was so cumbersome and complex that many people skipped steps or worked around the system. Now that we have an integrated system where everyone is working together and sharing the same information—we are much more efficient."

Lori Necyk, CFO
Alberta Construction Safety Association
Edmonton, Alberta

Sell and deliver on your promises.

Create accurate quotes quickly. Gain more business with accurate quotes that you can provide quickly. Quotes created in Sage CRM incorporate the current information from Sage 300 ERP such as inventory, part numbers, shipping, pricing, and availability.

Better forecast customer demand. With Sage CRM and Sage 300 ERP, you can more easily deliver on what you promise. Using Sage CRM, new sales quotes are updated into Sage 300 ERP. This ability for sales to report on their near-term close activities gives the purchasing department the information they need to more accurately forecast and order inventory.

Place new orders with speed and confidence. Using Sage CRM, your sales team can see inventory levels in real time, place a new quote or order, and see a sale through to its completion. Sales or customer service team members can enter new orders or view orders, invoices, inventory availability by location, customer purchase history, or credit status—all without having to call someone or log onto another system. Know critical information before an order is placed. For example, you are alerted when a customer's account is past due so that your company is protected from selling goods or services to customers with existing payment or status issues.

Delight your customers with knowledgeable service.

Instantly resolve more customer inquiries. When Sage CRM is integrated with Sage 300 ERP, each person across your business can access comprehensive and centralized information on every customer or supplier. Using Sage CRM, you can easily view real-time order status, past service call notes, invoices, payment history, credit status, and more. When you repeatedly demonstrate how well-informed you are, your customers' trust and reliance on your business will only get stronger.

See a 360-degree customer view. With Sage 300 ERP and Sage CRM working together, your Sage CRM interactive dashboard can be customized with an even richer at-a-glance view into each customer such as order status and purchase history. Management can see a comprehensive view into all customer activities and metrics, quickly identifying the areas that need the most attention.

Provide more information through self-service. Sage CRM provides you tools to create your own company self-service web portal so that your customers or suppliers have quicker access to the information they need such as viewing their account profile, requesting a quote, or seeing a status on a service issue. When combined with Sage ERP, other important information can be included such as order status, order history, pricing lists, and available inventory.

About Sage CRM

Sage CRM is designed to help small and medium-sized businesses like yours. It is easy to use, adapt, configure, learn, and manage for companies that want to focus on their business, not on their software. And critically, it's affordable, offering you the best possible value. When integrating with Sage ERP, you can enjoy more business insights, greater efficiencies, and a single, customer-centric view across the entire business.

See why over 14,000 organizations worldwide use award-winning Sage CRM to make every business interaction count.

For more info, visit: na.sage.com/sage-crm
or contact us at 866-530-7243