

Sage CRM Professional

A cloud-based solution, Sage CRM Professional supports all elements of marketing, sales and customer service. It gives you a single source of information across all your customer facing operations and equips you with the tools you need to find new customers, close sales faster and build lasting, more profitable relationships.

Get up and running immediately with our powerful, web-based Sage CRM solution

This cloud-based edition dramatically simplifies deployment and administration while providing you with a fully featured Sage CRM solution. Its 100% web-based architecture, easy to use wizards, plus support from Sage mean that you won't need dedicated IT resources to get the best from this solution.

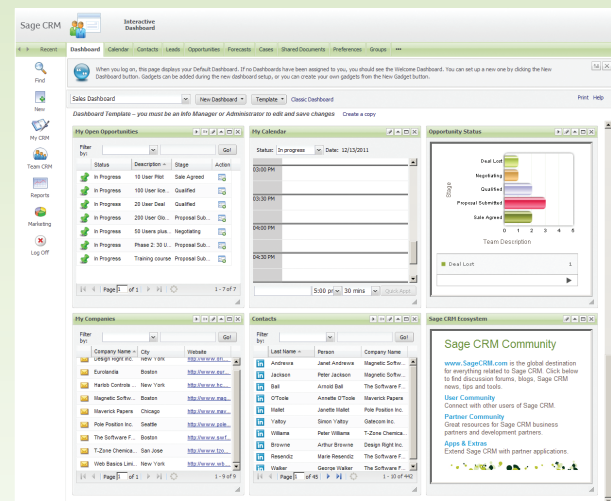
Sage CRM Professional automates marketing, sales and customer service operations in a simple to deploy, cloud-based solution.

Sage CRM Professional includes:

- Contact Management
- Opportunity Management
- Sales Forecasting
- Quotes & Orders
- Lead Management
- Interactive Dashboard
- Reporting
- Find/Advanced Find
- Group Management
- Classic Microsoft Outlook Plug-in
- Mobile Device Support (Apple iPhone and Android™)
- Data Import
- Case Management
- Solutions/Knowledgebase Management
- Campaign Management
- Outbound Call Handling
- Manage Relationship Types
- Email Management
- User Management
- Territory/Security Management
- Workflow
- Preconfigured Escalations
- Professional User Management

Perfect for:

- Enhancing the operation of sales, marketing and customer service functions
- Deploying quickly and simply
- Executing marketing campaigns
- Progressing sales opportunities
- Making customer interactions more effective and profitable
- Using in the office or on the move



- The Sage CRM Interactive Dashboard is a customisable and intuitive workspace from where users can manage and co-ordinate their daily activities and tasks from one location.

Experience the difference Sage CRM can make to your business with our free 30 day, no obligation trial – visit

sagecrm.com/ireland

Sage CRM Editions

Functionality	Essentials	Professional
Base Functionality		
Contact Management - Companies, People, Address, Phone number, E-mail	✓	✓
Calendar Feature	✓	✓
Document Management	✓	✓
Interactive Dashboard	✓	✓
Export reports and lists to PDF	✓	✓
Export reports and lists to CSV	✓	✓
Group Management - Mass Tasks, Document Mail Merge, Group Email, Export	✓	✓
Advanced Find	✓	✓
Microsoft Outlook Lite	✓	
Classic Microsoft Outlook Plugin		✓
Mobile Device Management		✓
Reporting	✓	✓
Multi-currency enabled	✓	✓
Sales Force Management		
Sales Opportunities	✓	✓
Opportunity Pipeline Management	✓	✓
Opportunity Tracking	✓	✓
Sales Forecasting	✓	✓
Quotes and Orders Management	✓	✓
Product Management	✓	✓
Lead to Opportunity Conversion	✓	✓
Web to Lead	✓	✓
Marketing & Customer Services		
Marketing Automation		
Campaign Management		✓
Campaign Group Actions - Email, Outbound Call List, Export to CSV, Mail Merge		✓
Outbound Call Handling		✓
Customer Care		
Case Management		✓
Knowledge Base/Solution Management		✓
User Management		
User Administration	✓	✓
Personal User Preferences	✓	✓
My CRM to manage my information	✓	✓
Team CRM to manage workgroup information	✓	✓
Preloaded themes to change the look and feel of the UI	✓	✓

Functionality	Essentials	Professional
Security		
Field Level Security to control data access	✓	✓
Territory Management		✓
Roles-based security		✓
Add, move, edit, merge, and rebalance territories		✓
Customisation Capabilities		
Screen/List Management	✓	✓
Field & Caption Management	✓	✓
View Management		✓
Notifications	✓	✓
Advanced Customisations		
Escalation rules (*Pre-Configured Only)	✓	✓
Edit Escalation rules (*Pre-Configured Only)		✓
Workflow Management		✓
Add Client Side actions to workflows		✓
Integrations		
Real Time SData Feeds	✓	✓
Developer Interfaces		
SOAP web services API		✓
Data Management		
Data Upload from CSV	✓	✓
Product List Management	✓	✓
De-Duplication		✓
Forecast Management	✓	✓
Database Export	✓	✓
Manage Relationship Types		✓
Key Attribute Data		✓
Email & Documents		
Spellchecking	✓	✓

Sage CRM

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