



SAGE CRM - INCLUDED IN  
SAGE MAS 90 v4.5

PRESENTED BY JEFF ROSE



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**WHAT IS INCLUDED WITH MAS 90/200 4.5**

SageCRM Software and Licenses Included with MAS 90/200

- SageCRM 200 Server License
  - \$3,995 if purchased separately
- A Single Name or Concurrent User License
  - Named User \$795
  - Concurrent User \$1,495
- Additional Users Maintenance is 18% of SLP

Concurrent versus Named License

- When SageCRM Server is registered with Sage Software a decision must be made between Concurrent or Named Licensing. Mixing is not allowed.
- Named are Licenses Allocated to a specific user
- Concurrent is a specific number of Access allowed for a Pool of Users.



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**INTEGRATION FEATURES**

- Customer Data Synchronization
  - Initial Load of SageCRM Data would come from MAS Customer list
  - Changes in one Application sync automatically to the other
  - Promotion of Prospect to Customer without rekeying MAS Customer
- Contact Data Synchronization
  - Same as Customer
- Quote/Order Synchronization
  - The Master Orders record is stored in MAS 90/200
  - SageCRM Launches MAS Order Entry
  - Quote/Order Data is Synchronized to SageCRM Order Database
  - Item Data, Item/Customer Pricing, and other order supporting data maintained in MAS.
- MAS Data Available for Dashboards, Reports and Custom SageCRM Screens



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INTEGRATION DEMONSTRATION



**M MARTIN**  
AND ASSOCIATES

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SAGE CRM FOR SALES - FEATURES

- Opportunity and Pipeline Management
- Territory Management
- Forecasting and Reporting
- Sales Workflow
- Lead Management
- Quotes and Orders Processing
- Calendar Management
- Mobile Solution
- Powerful networking through LinkedIn Integration
- Sage CRM for iPhone



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SAGE CRM FOR SALES - BENEFITS

- Ensures transparency in sales pipeline
- Leads to better business planning from accurate forecasting
- Provides visibility on sales performance
- Enables cross- and up-selling of opportunities
- Decreases time spent on administrative tasks
- Automates proposal and quotation processes
- Increases visibility on customer interactions across organization
- Leverages financial information from the back-office system



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### SAGE CRM FOR MARKETING - FEATURES

- Powerful e-marketing capabilities
- Automatic campaign results tracking
- Open, click and bounce-rate tracking
- Over 90 attention-grabbing templates out-of-the-box
- Integrated telesales follow-up
- Campaign cloning
- Document store and share
- In-call data modification
- Customer profiling and analysis
- Rapid lead to opportunity management



Sage E-marketing for Sage CRM



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### SAGE CRM FOR CUSTOMER SERVICE - FEATURES

- Case Management
- Escalation and notification alerts
- Knowledge base
- Workflow approval process
- Detailed analysis on call volumes and case resolution
- Traffic light monitoring
- Web self-service
- Staff performance monitoring
- Bespoke company dashboard to provide tighter account management



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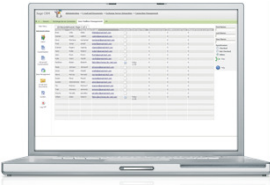
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### SAGE CRM FOR IT & MANAGEMENT - FEATURES

- Component Manager
- Fast, flexible deployment options
  - On-premise, on-demand or Cloud-deployable
- SData support
- MS Exchange integration
- Affordable and scalable
- Integration to ERP systems
- Reporting and analytics
- Budget control



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### SAGE CRM AND SOCIAL MEDIA - FEATURES

- Sage CRM for Twitter
- LinkedIn Integration
- Interactive Dashboard
  - RSS feed gadget
  - Website gadget






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### SAGE CRM AND SOCIAL MEDIA - BENEFITS

**Sage CRM for Twitter**

- Enables users to update, read and reply to Twitter directly from within Sage CRM
- Provides marketing teams with the ability to extend and link marketing campaigns to Twitter

**LinkedIn Integration**

- Enables sales team to better target prospects and prepare for sales call

**Interactive Dashboard Gadget**

- Provides users with instant access to blogs, websites directly from within Sage CRM





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### ACCELERATING CRM SUCCESS

<p><b>Ease-of-Use</b></p> <p><b>Easy to use</b></p> <ul style="list-style-type: none"> <li>• Intuitive user interface</li> <li>• Easy to navigate</li> <li>• Easy to learn and adopt</li> <li>• Easy to personalise</li> <li>• Roles-based interactive dashboards out-of-the-box</li> <li>• Graphical workflow orchestration out-of-the-box</li> </ul>	<p><b>Ease-of-Anywhere Access</b></p> <ul style="list-style-type: none"> <li>• Fully web-based for any time, anywhere access</li> <li>• Web access from any mobile device</li> <li>• Bespoke iPhone experience</li> <li>• Real-time synchronization with MS Exchange</li> <li>• 24hr access to up-to-date communications, calendar and contacts regardless of device or location</li> </ul>	<p><b>Ease-of-Customization</b></p> <ul style="list-style-type: none"> <li>• Open architecture for easy customization</li> <li>• Codeless customization</li> <li>• Fully customizable business process, workflow orchestration</li> <li>• Fully customizable dashboards</li> </ul>	<p><b>Business Integration</b></p> <ul style="list-style-type: none"> <li>• Sage ERP integration</li> <li>• MS Exchange integration</li> <li>• MS Outlook integration</li> <li>• Social media integration</li> <li>• Web self-service</li> <li>• Easy integration with third party applications</li> </ul>	<p><b>Fast, Flexible Deployment</b></p> <ul style="list-style-type: none"> <li>• Available on-premise, hosted or in the Cloud</li> <li>• Fully web-based for rapid roll-out and ongoing administration</li> <li>• Easy to use for rapid user adoption</li> <li>• Rapid ROI</li> <li>• Low TCO</li> </ul>
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**WHAT THE ANALYSTS SAY**

**Gartner on Sage CRM**

Strengths include:



- End-user usability
- Core opportunity management
- End-to-end business process support, such as "opportunity to cash"

Source: Gartner Magic Quadrant for Sales Force Automation 28 July 2010

**Forrester on Sage CRM**

The solution's primary strengths include a low price tag, strong usability, and quick time-to-value. The solution offers an intuitive admin UI, strong performance capabilities, and strong product help functionality. In addition, the product integrates well with other Sage back-office software products.

Source: The Forrester Wave™ CRM Suites For Mid-sized Organizations, Q2 2010, Forrester Research, Inc.


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**NEXT STEPS**

- Visit the Sage CRM v7.1 microsite at [www.sagecrm.com/v7.1](http://www.sagecrm.com/v7.1)
- Join the Sage CRM Community
  - User Community
  - Exclusive materials and downloads
  - Blogs and forums
- Watch the Sage CRM Overview Video
- Arrange a demo






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