

# SageCRM | Switching to SageCRM

## Part of the Sage Accpac Extended Enterprise Suite

Switch to SageCRM  
to increase your  
sales, to collect cash  
quicker, and to better  
serve your customers

When it comes to managing relationships with customers, vendors, and partners, many companies settle for contact management or basic customer relationship management tools. Products like Maximizer®, Goldmine®, and Microsoft® Outlook® do a good job of organizing contacts and simple tasks, and some even automate basic work processes but lack the functionality to truly optimize your business.

### Successful companies need more

Top companies need a complete solution that eliminates the time-consuming work related to managing interactions with customers effectively. With a system that streamlines how work gets done and provides your team with a consistent and complete view of each customer, productivity skyrockets, and your customers' experience flourishes.

SageCRM does this and more. And since SageCRM is bundled with Sage Accpac Extended Enterprise Suite, your investment is paid back almost immediately.

Need more convincing? Read on to find out why moving up from simply "managing your contacts" to optimizing your customers' experience is the right move.

### Manage the entire customer life cycle using one system for better customer service

SageCRM—available at no additional charge with your Sage Accpac system—provides you with a single system to manage the entire life cycle of your customer relationships. While competitive products are point solutions that manage one or two areas of customer interactions, only Sage Accpac Extended Enterprise Suite manages the customer life cycle from lead acquisition to product shipment, including every step in between, from quote to order to invoicing. It even manages after-sale customer service!

Sage Accpac Extended Enterprise Suite gives your entire team a single consistent view of the customer, ensuring customers receive the most accurate and up-to-date information, no matter whom they interact with. Customer service representatives are able to address customer queries with confidence because they have access to shipping, invoicing, and returns information. Sales representatives book orders correctly, the first time, every time because they have access to the account, pricing, and stock information.



## Spend less time “pushing paper” and more time generating sales

To truly optimize how your team manages its processes and interactions, you shouldn't settle for a solution that is little more than a task list. Advanced automation functionality with native workflow is key. While competitive products turn to “outside” sources for their workflow solutions—or, worse, don't have workflow at all—the SageCRM native workflow engine ensures the processes across all channels, departments, and employees are automated according to your company's unique requirements. All actions are automatically routed to the correct employee for timely completion, regardless of whether they are managing a marketing campaign, closing a sale, or collecting outstanding accounts receivable.

With Sage Accpac Extended Enterprise Suite, you have your accounting, operational, and customer information tied together in a single system. This provides your front-line staff access to relevant customer account information, eliminating the need to interrupt the accounting team with questions about terms, credit, pricing, and inventory status. It also allows orders to be entered directly into the system, eliminating the need for duplicate data entry and reducing the chance of error. Your accounting team's time is focused on getting invoices out faster, getting them right the first time, and shortening the order-to-cash time. Try to do this with your current system!

can be customized with little technical knowledge on a codeless basis. Workflows within SageCRM can be defined and implemented without burdening your high paid IT staff or requiring outsourced development work. And SageCRM offers a choice of deployment options: on-premise in your office environment or on-demand hosted by Sage and accessed over the Internet.

You can even expand your system to meet your specific needs. Your SageCRM solution can be extended by adding integrated products from over 100 SageCRM-authorized development partners—more than those offered by the competitors.

## Enjoy lower total cost

When determining total cost of any software investment, a number of factors must be considered: the out-the-box costs of the software and implementation, the training of end-users, the ongoing maintenance of the software, and the “administrative” costs of managing the relationship with the vendor(s). Sage Accpac customers using Version 5.5 (or greater) have access to SageCRM for no additional charge. Compare that to the tens of thousands of dollars required to obtain comparable versions of competing products, which also often require subscription to a minimum number of licenses—as many as ten users to start.

SageCRM is true Web-based software, and therefore its implementation is centralized on a single application server rather than on each end-user's PC or mobile device. Its being a true Web-based application is also significant for the ongoing maintenance of the system as updates, upgrades, or modifications are made at a single centralized location. Because the “thin client” user interface in a Web-based architecture requires less processing power, less of an investment may be required for client-side hardware.

Further implementation savings are due to the fact that the integration between the front-office sales and marketing automation and the back-office accounting and operations is out of the box, allowing you to avoid the cost to buy and implement “integration” links. When the time comes to add more functionality, you may find greatly improved interoperability with other applications, as they are able to integrate directly at the application server.

Even training is simplified with SageCRM. Training users on the software and its familiar Web browser interface is much less of a task than training users on multilayered “thick client” competing applications, leading to lower training costs and more rapid end-user adoption. Further cost savings are available due to the fact that all software may be obtained from a single vendor—Sage—and all services are available through a single Sage authorized business partner. The result: less time and money spent “administering” relationships with multiple vendors.



- 1-Give front-office staff the ability to view order line-item details
- 2-Allow front-office staff to enter orders directly into Sage Accpac ERP from the SageCRM desktop

## Run your business the way you want with a comprehensive solution that's tailored to match your needs

You shouldn't have to adjust your business practices in order to work with a new tool. SageCRM adapts to the requirements of your individual business, not the other way around. Customizing competitive products requires either specific programming skills or the additional purchase of a customization suite—or both. But SageCRM



	SageCRM (included in Sage Accpac Extended Enterprise Suite)	Contact Management solutions–Enterprise versions (such as Goldmine Enterprise, Maximizer Enterprise)	Contact Management solutions–entry-level versions (such as Goldmine Corporate; Maximizer Entrepreneur)	Microsoft Outlook
Minimum number of users	1	10	1	1
Maximum number of users	Unlimited	Unlimited	10	1
Contact Management	●	●	●	●
Sales Force Automation (basic)	●	●		
Sales Force Automation (advanced)	●	some require third party		
Marketing Automation (basic)	●	●		
Marketing Automation (advanced)	●	some require third party		
Customer Service Automation	●	●		
One single system to manage entire customer life cycle	●			
Many-to-many relationships	●			
Tools to help collect outstanding receivables	●			
Allows front-line staff to access customer account information in Sage Accpac and in real time	●			
Easy to customize without programming or additional kit	●			
Web-based architecture	●			
Choice of deployment–on-premise or hosted	●			
Company with the largest CRM user base	2.8 million			
Company with longest established customer base	27 years			
Most third-party product CRM technology partners	101 partners			

Please visit [www.SageAccpac.com/Products/CRM](http://www.SageAccpac.com/Products/CRM) or call 800-873-7282 for more information about SageCRM.