



## SAGE CRM

## CUSTOMER RELATIONSHIP MANAGEMENT

Sage CRM provides your sales, marketing, and customer service teams with the tools they need to find new customers, close sales faster, and build lasting, more profitable relationships across all channels.

With Sage CRM, you can:

- Empower your staff with enterprise-wide access to vital customer, partner, and prospect information.
- Build long-lasting customer loyalty and generate repeat sales from your best customers.
- Integrate with many popular accounting and ERP solutions for efficient access to customer, partner, and transactional data.
- Analyze, forecast, and report on key sales data.
- Assign, schedule, and track marketing campaign activities, and measure the performance of every campaign.
- Identify, execute and replicate effective marketing initiatives across your sales channels.
- Access relevant customer data in real time, including orders, call and escalation history, interactions, multiple contacts, support cases, e-mail and documents sent and received, and sales opportunities.
- Integrate with other applications through our sophisticated, yet easy to use, Web Services interface.
- And much more!

The screenshot displays the Sage CRM web interface. At the top, there's a navigation bar with options like 'My Dashboard', 'My Contacts', 'My Preferences', 'Calendar/Tasks', 'Leads', 'Opportunities', 'Document Library', 'Forecasts', 'Cases', and 'Outbound Call Lists'. A central dashboard shows a progress bar for '5 Opportunities, Page 1 of 1' with a status breakdown: Lead (1), Proposal Submitted (2), Negotiating (1), and Sale Agreed (1). Below this, there are three main data tables:

Opportunities	Communications	Cases																																																																																																																								
<table border="1"> <thead> <tr> <th>Status</th> <th>Description</th> <th>Company Name</th> <th>Person</th> <th>Updated</th> <th>Stage</th> <th>Priority</th> <th>Territory</th> </tr> </thead> <tbody> <tr> <td>10 year catalog</td> <td>Sample Customer Corp</td> <td>Jobeth Williams</td> <td>08/10/2005 10:30</td> <td>Lead</td> <td>Normal</td> <td>Worldwide</td> </tr> <tr> <td>Services Required</td> <td>Sample Customer Corp</td> <td>Dave Williams</td> <td>Today 08:15</td> <td>Proposal Submitted</td> <td>Normal</td> <td>Worldwide</td> </tr> <tr> <td>Documentation</td> <td>Sample Customer Corp</td> <td>Jobeth Williams</td> <td>Today 08:15</td> <td>Negotiating</td> <td>Normal</td> <td>Worldwide</td> </tr> <tr> <td>Discovery Session</td> <td>Sample Customer Corp</td> <td>Dave Williams</td> <td>03/05/2005 08:15</td> <td>Sale Agreed</td> <td>High</td> <td>Worldwide</td> </tr> </tbody> </table>	Status	Description	Company Name	Person	Updated	Stage	Priority	Territory	10 year catalog	Sample Customer Corp	Jobeth Williams	08/10/2005 10:30	Lead	Normal	Worldwide	Services Required	Sample Customer Corp	Dave Williams	Today 08:15	Proposal Submitted	Normal	Worldwide	Documentation	Sample Customer Corp	Jobeth Williams	Today 08:15	Negotiating	Normal	Worldwide	Discovery Session	Sample Customer Corp	Dave Williams	03/05/2005 08:15	Sale Agreed	High	Worldwide	<table border="1"> <thead> <tr> <th>Date / Time</th> <th>Action</th> <th>Person</th> <th>Details</th> <th>Territory</th> <th>User</th> <th>Regarding</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>08/10/2005 10:30</td> <td>Phone Out</td> <td>Dave Williams</td> <td>call to follow up with Dave he had some questions</td> <td>Worldwide</td> <td>Bill Hoffman</td> <td></td> <td></td> </tr> <tr> <td>08/09/2005 08:10</td> <td>Meeting</td> <td>Dave Williams</td> <td>meeting to discuss clients business and process</td> <td>Worldwide</td> <td>Bill Hoffman</td> <td></td> <td></td> </tr> <tr> <td>04/09/2005 08:10</td> <td>To Do</td> <td>Dave Williams</td> <td>Follow up on promotional materials sent</td> <td>Worldwide</td> <td>Bill Hoffman</td> <td></td> <td></td> </tr> <tr> <td>01/09/2005 08:10</td> <td>Letter Out</td> <td>Dave Williams</td> <td>promotional piece sent (10% discount offer)</td> <td>Worldwide</td> <td>Bill Hoffman</td> <td></td> <td></td> </tr> </tbody> </table>	Date / Time	Action	Person	Details	Territory	User	Regarding	Status	08/10/2005 10:30	Phone Out	Dave Williams	call to follow up with Dave he had some questions	Worldwide	Bill Hoffman			08/09/2005 08:10	Meeting	Dave Williams	meeting to discuss clients business and process	Worldwide	Bill Hoffman			04/09/2005 08:10	To Do	Dave Williams	Follow up on promotional materials sent	Worldwide	Bill Hoffman			01/09/2005 08:10	Letter Out	Dave Williams	promotional piece sent (10% discount offer)	Worldwide	Bill Hoffman			<table border="1"> <thead> <tr> <th>Status</th> <th>Ref ID</th> <th>Priority</th> <th>Fix it</th> <th>Person</th> <th>Description</th> <th>Assigned To</th> <th>Stage</th> <th>Territory</th> <th>SLA</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>2</td> <td>1-10024</td> <td>High</td> <td>2.0</td> <td>Jobeth Williams</td> <td>Login Details</td> <td>Bill Hoffman</td> <td>Logged</td> <td>Worldwide</td> <td></td> <td></td> </tr> <tr> <td>3</td> <td>1-10025</td> <td>Normal</td> <td>4.0</td> <td>Jobeth Williams</td> <td>Documentation Design</td> <td>Gary Vollhoffer</td> <td>Investigating</td> <td>Worldwide</td> <td></td> <td></td> </tr> <tr> <td>4</td> <td>1-10026</td> <td>Normal</td> <td>4.0</td> <td>Dave Williams</td> <td>Setup Network Topography</td> <td>Bill Hoffman</td> <td>Logged</td> <td>Worldwide</td> <td></td> <td></td> </tr> </tbody> </table>	Status	Ref ID	Priority	Fix it	Person	Description	Assigned To	Stage	Territory	SLA	Status	2	1-10024	High	2.0	Jobeth Williams	Login Details	Bill Hoffman	Logged	Worldwide			3	1-10025	Normal	4.0	Jobeth Williams	Documentation Design	Gary Vollhoffer	Investigating	Worldwide			4	1-10026	Normal	4.0	Dave Williams	Setup Network Topography	Bill Hoffman	Logged	Worldwide		
Status	Description	Company Name	Person	Updated	Stage	Priority	Territory																																																																																																																			
10 year catalog	Sample Customer Corp	Jobeth Williams	08/10/2005 10:30	Lead	Normal	Worldwide																																																																																																																				
Services Required	Sample Customer Corp	Dave Williams	Today 08:15	Proposal Submitted	Normal	Worldwide																																																																																																																				
Documentation	Sample Customer Corp	Jobeth Williams	Today 08:15	Negotiating	Normal	Worldwide																																																																																																																				
Discovery Session	Sample Customer Corp	Dave Williams	03/05/2005 08:15	Sale Agreed	High	Worldwide																																																																																																																				
Date / Time	Action	Person	Details	Territory	User	Regarding	Status																																																																																																																			
08/10/2005 10:30	Phone Out	Dave Williams	call to follow up with Dave he had some questions	Worldwide	Bill Hoffman																																																																																																																					
08/09/2005 08:10	Meeting	Dave Williams	meeting to discuss clients business and process	Worldwide	Bill Hoffman																																																																																																																					
04/09/2005 08:10	To Do	Dave Williams	Follow up on promotional materials sent	Worldwide	Bill Hoffman																																																																																																																					
01/09/2005 08:10	Letter Out	Dave Williams	promotional piece sent (10% discount offer)	Worldwide	Bill Hoffman																																																																																																																					
Status	Ref ID	Priority	Fix it	Person	Description	Assigned To	Stage	Territory	SLA	Status																																																																																																																
2	1-10024	High	2.0	Jobeth Williams	Login Details	Bill Hoffman	Logged	Worldwide																																																																																																																		
3	1-10025	Normal	4.0	Jobeth Williams	Documentation Design	Gary Vollhoffer	Investigating	Worldwide																																																																																																																		
4	1-10026	Normal	4.0	Dave Williams	Setup Network Topography	Bill Hoffman	Logged	Worldwide																																																																																																																		

Sage CRM captures information and intelligence from every sales, marketing, and service interaction.

### Empower Employees and Strengthen Customer Relationships

Sage CRM is an easy-to-use, fast-to-deploy, feature-rich, low-cost, Internet-based CRM solution designed to introduce the real benefits of CRM to your organization.

Sage CRM uses industry-leading technology to foster better business practices and effortless information exchange throughout your organization. With Sage CRM, you can quickly analyze, manage, and synchronize sales, marketing and customer care activities across all points of contact. Regardless of how, when or where your customers, partners, and prospects choose to interact with your company, Sage CRM gives you a decisive advantage by providing comprehensive, easy-to-use tools to successfully manage these relationships.

Sage CRM offers a full range of on-demand or on-site deployment options, which means you get complete flexibility to run your business your way. As your business needs change, you can quickly and easily switch deployment environments (from on-demand to on-site deployment, or vice versa), and all your CRM configuration and data move with you.



# Sage CRM

## Customer Relationship Management

*With Sage CRM, you can quickly analyze, manage, and synchronize sales, marketing, and customer care activities across all points of contact.*

### Versatile CRM

Sage CRM offers unmatched flexibility and performance with advanced features, industry-leading technology, and a robust architecture built to stand the test of time. It integrates seamlessly with industry-leading Sage Software business management applications, and also works with applications from other vendors.

#### Sage CRM includes:

**Sales Force Automation** – Sage CRM puts you in complete control of your sales pipeline, allowing sales teams to effectively manage, forecast, and report on all phases of the sales cycle. With Sage CRM, you can easily manage and analyze all current and historical account details and activities, manage multiple accounts and opportunities, and automatically distribute leads to sales professionals around the world. Point-and-click reporting and graphs offer sales teams access to real-time data, for on-the-spot analysis and evaluation. By analyzing the information available, you can recruit new clients and resell to existing ones.

**Marketing Automation** – Sage CRM provides a single source of customer information to help you better manage your marketing efforts and make sound decisions based on the needs of your customers and prospects. With Sage CRM Marketing, you can target the right customer at the right time, eliminate guesswork, and put your company's marketing resources to their best use. You can schedule and track marketing activities within a campaign—and view every detail of each campaign.

**Customer Care Automation** – With Sage CRM, you can make the most of every customer interaction, maximizing business opportunities and customer satisfaction. It empowers your organization with critical information to build and support long-term customer satisfaction and loyalty.

With Sage CRM Customer Care, you can build and effectively manage lasting customer relationships by providing the professional level of service your customers expect. Sage CRM provides real-time access to relevant customer data including orders, call and escalation history, interactions, multiple contacts, support cases, e-mail and documents sent and received, sales opportunities, and more.

### Web and Wireless Access

Access Sage CRM anytime, anywhere, even when not connected to a network, mobile users can work offline and later synchronize with the central server, using the optional Solo replication feature.

### Web Self Service

Sage CRM Web Self Service allows customers to access information or request services and support over the Web whenever they want. Customers receive information based on their preferences, requests, and history through customized customer and partner portals.

### Outlook Integration

Sage CRM has complete, two-way synchronization with Microsoft Outlook contacts, calendar (appointments) and tasks, in addition to enhanced e-mail integration. You also have the option to use your entire Sage CRM system from within the standard Microsoft Outlook interface. Lastly, this comprehensive integration also enables you to synchronize your CRM data to pocket devices such as mobile phones and PDAs that synchronize with Outlook.

### Automated Process Workflow

With Sage CRM Workflow businesses can automate pre-determined business rules across all channels, departments, and employees. To help assess and design workflow, Sage CRM provides graphical views of the process and its development patterns. In combination with e-mail integration, workflow ensures that actions requiring attention or escalation are automatically being routed to the correct employees or partners. Sage CRM creates a confidence among employees that issues are not going to fall through the cracks and frees their time to perform more important tasks.

### Customizations

Sage CRM provides customization tools that allow businesses to rapidly modify all aspects of the system. Sage CRM's open architecture greatly reduces development and maintenance costs and allows seamless integration with other mission-critical applications across your enterprise. With easy-to-use, onscreen tools, managers and administrators can create and modify fields, screens, tabs, tables, views, scripts, and security settings on the fly. Sage CRM customization functionality allows quick-and-easy user-specific modifications to interfaces and data and ensures Sage CRM can be easily adapted to your business requirements.

### Computer Telephony Integration (CTI)

Sage CRM combines a fully integrated CRM solution with interactive inbound and outbound telephony automation. Contact centers are provided access to the same single point of communication the rest of the enterprise shares. A customer's complete CRM history including, fax, personal visits, phone, and e-mail is viewed through automated screen "pop-up" functionality and gives the support employees an enterprise view of the customer experience. Full on-screen auto-dial and phone functionality allows your support staff to perform necessary tasks through the system interface rather than the phone system. Sage CRM provides full integration to all standard third party telephony software leveraging existing automation such as call escalation, routing, call queuing, and reporting functionality.



The Premier Sage Software Business Solutions Provider • National Presence, Local Touch • 1.800.425.9843 • [www.blytheco.com](http://www.blytheco.com)



8800 N. Gainey Center Drive, Suite 200 • Scottsdale, Arizona 85258 • Sales: 800-643-6400 • Info: 480-368-3700 • [www.sagecrm.com](http://www.sagecrm.com)

©2005 Sage Software, Inc. All rights reserved. The Sage Software logo and the Sage Software products and service names mentioned herein are registered trademarks or trademarks of Sage Software, Inc., or its affiliated entities. All other trademarks are the property of their respective owners.

5CRM003 05-6136/1005