



Product Brochure

Sage CRM

Put your business on the path to growth. Extend the power of your Sage Business Management Solution right across your business, giving end-to-end visibility, so you can make informed business decisions across marketing, sales, and service teams, whenever and wherever they work together.

Sage

Help your business flow.

Our range of sales, marketing and service modules help meet the needs of agile businesses.



Create targeted marketing campaigns

Help your marketing team reach the right people, at the right time.

Accelerate and focus your sales activities

Work on the most profitable activities to grow your business.

Provide an excellent customer experience

Delight customers and outperform the competition.

Harness the power of an integrated CRM solution

Automate processes within your business and do more for less.

Put your business on the path to growth.

Providing the tools to improve data capture and process flows.

Sage CRM can extend the power of your Sage Business Management Solution right across your business, giving you visibility of data that you can trust, so that you can make informed business decisions.

Drive your business growth



Sage CRM is affordable, easy to use and highly adaptable for any size and type of business. Across the world, thousands of customers rely on Sage CRM to realise efficiencies in front-to-back operations, whatever their business model.

Sage CRM for Marketing.

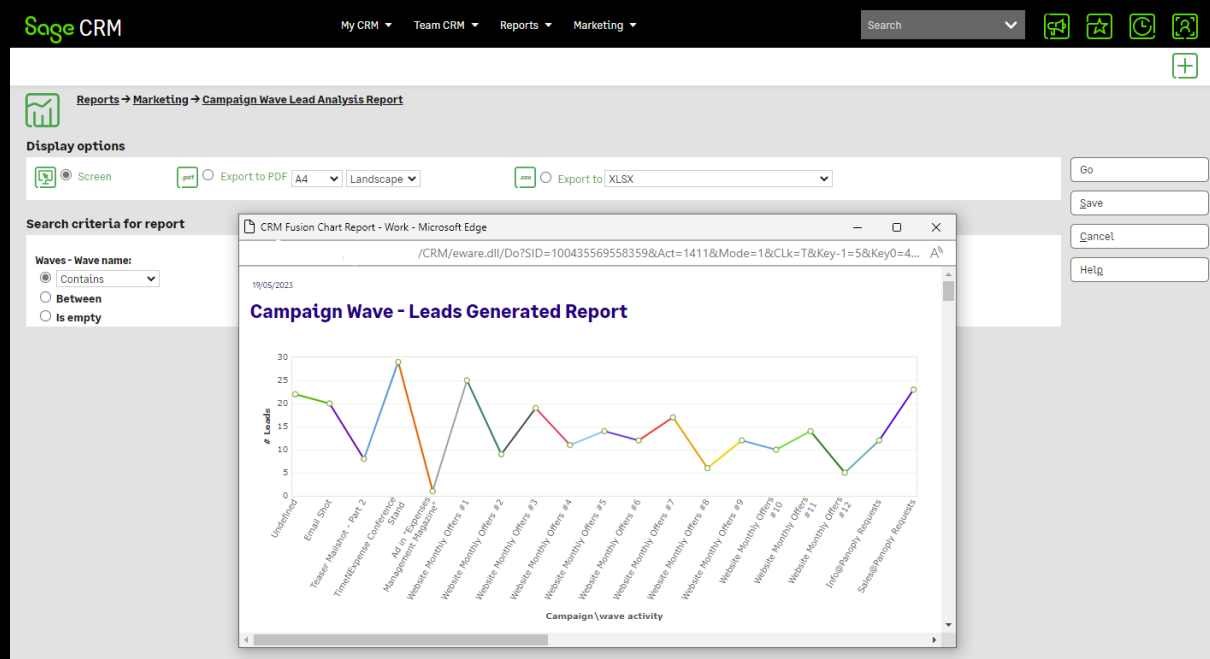
Target the right customers at the right time, cost effectively.

Get the most from your marketing spend

Are your marketing campaigns delivering the right results? More targeted campaigns ensure a higher return on your investment, faster.

Our marketing tools enable you to:

- Plan campaigns, track the results and run reports within minutes
- Manage a marketing campaign across multiple channels
- Track new leads and sales opportunities
- Collect data and provide analysis to improve your next campaigns.



Sage CRM for Sales.

Ensure sales work on the right business, at the right time.

Focus your performance

Sage CRM customers have increased the productivity of their sales teams by up to 40%, helping to improve sales performance across their business – in the office or on the road – and making informed business decisions every day.

Our sales tools enable you to:

- Manage leads from prospect to closure, with all the right information
- Track marketing activity into sales, ‘closing the loop’ on performance
- Generate quotes, orders and proposals using predefined templates

The image displays two overlapping screenshots of the Sage CRM web application. The background screenshot shows the 'Interactive Dashboard' with sections for 'My Open Opportunities', 'My Calendar', 'My Companies', and 'Contacts'. The foreground screenshot shows a detailed view of a company record for 'Gatecom Inc.', including contact information, a narrative, address, communication history, and sales performance.

Sage CRM Dashboard Overview:

- Navigation: Dashboard, Calendar, Calendar List, Contacts, Leads, Opportunities, Forecasts, Cases, Shared Documents, Preferences, Groups
- My Open Opportunities Table:

Status	Description	Stage	Action
In Progress	10 User Pilot	Sale Agreed	
In Progress	100 User licenses	Qualified	
In Progress	20 User Deal	Qualified	
In Progress	200 User Global D...	Proposal Submitt...	
In Progress	50 Users plus con...	Negotiating	
In Progress	Phase 2: 30 User r...	Proposal Submitt...	
In Progress	Training course	Proposal Submitt...	

Company Record: Gatecom Inc.

- Company:** Gatecom Inc.
- Phone:** 1206.345.9577
- E-mail:** info.GatecomInc@demosaagecrm.com
- Status:** InProgress
- 2 minute read time**
- Company Narrative:** Gatecom Inc. is an Active Prospect within the territory US West. The main account is managed by Brian Little (415.093.1345), reporting to Susan Maye (212.340.1298).
- Address:** Gatecom Inc. has office(s) in Seattle and 1 other location(s). Its business focus is Computers - Hardware and the main contact is Simon Yalloy (Sales Manager). We know 2 other contact(s) at Gatecom Inc..
- Communication:** The last communication we had with Gatecom Inc. was a E-marketing E-mail 65 day(s) ago.
- Sales:** Since 03/22/2023 we have made 1 sale(s) to Gatecom Inc.. The last sale was for 30 users. It was worth EUR Nil. Successful sales to Gatecom Inc. took on average 0 day(s) from open to close. We are currently working on 3 opportunity(ies).

Sage CRM for Service.

Automating customer service, from help desk to account management.

Your customers are the lifeblood of your business.

Nurturing customers and providing them with an excellent customer experience will improve your retention rate and drive growth.

The tools within Sage CRM will empower your people to:

- Automate customer service cases, helping resolve cases faster
- Save time by storing information in a central knowledgebase
- Monitor metrics like case volume, history and resolution times
- View customer service cases assigned to them and their team

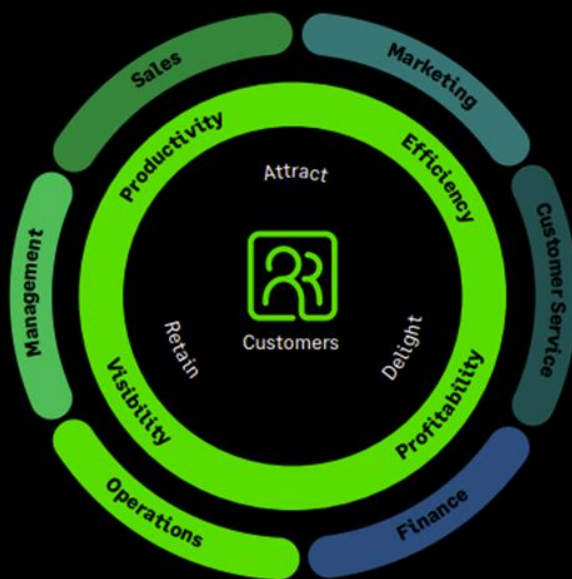
The screenshot displays two overlapping windows from the Sage CRM interface. The background window is titled 'Reports → Customer Service → Open Cases by Product'. It features a 'Display options' section with 'Screen' selected and 'Export to PDF' and 'Export to XLSX' buttons. Below this is a 'Search criteria for report' section with radio buttons for 'Matches any of the values' (selected), 'Does not match any of the values', and 'Is empty'. A bar chart shows data for Product Ids 1 through 7. Below the chart is a table with the following data:

RefId	Description
0-20	Setup not working
0-22	Missing Sys Admin Manual
0-26	Installation issue
1-10043	Incorrect user license error

The foreground window is titled 'Administration → Advanced Customisation → Workflow'. It shows a 'Workflow: Case Workflow' diagram. On the left, a list of 'Available Rules' includes: New Case, Queue, Waiting, Investigating, Solved, Pass, Fail, Regression, Re-Assign, and Accept. On the right, 'Available States' are listed: Start, Logged, Queued, and Waiting. The workflow diagram shows a flow starting from 'New Case', moving to 'Logged', then to 'Queue'.

Integrating CRM to your accounting.

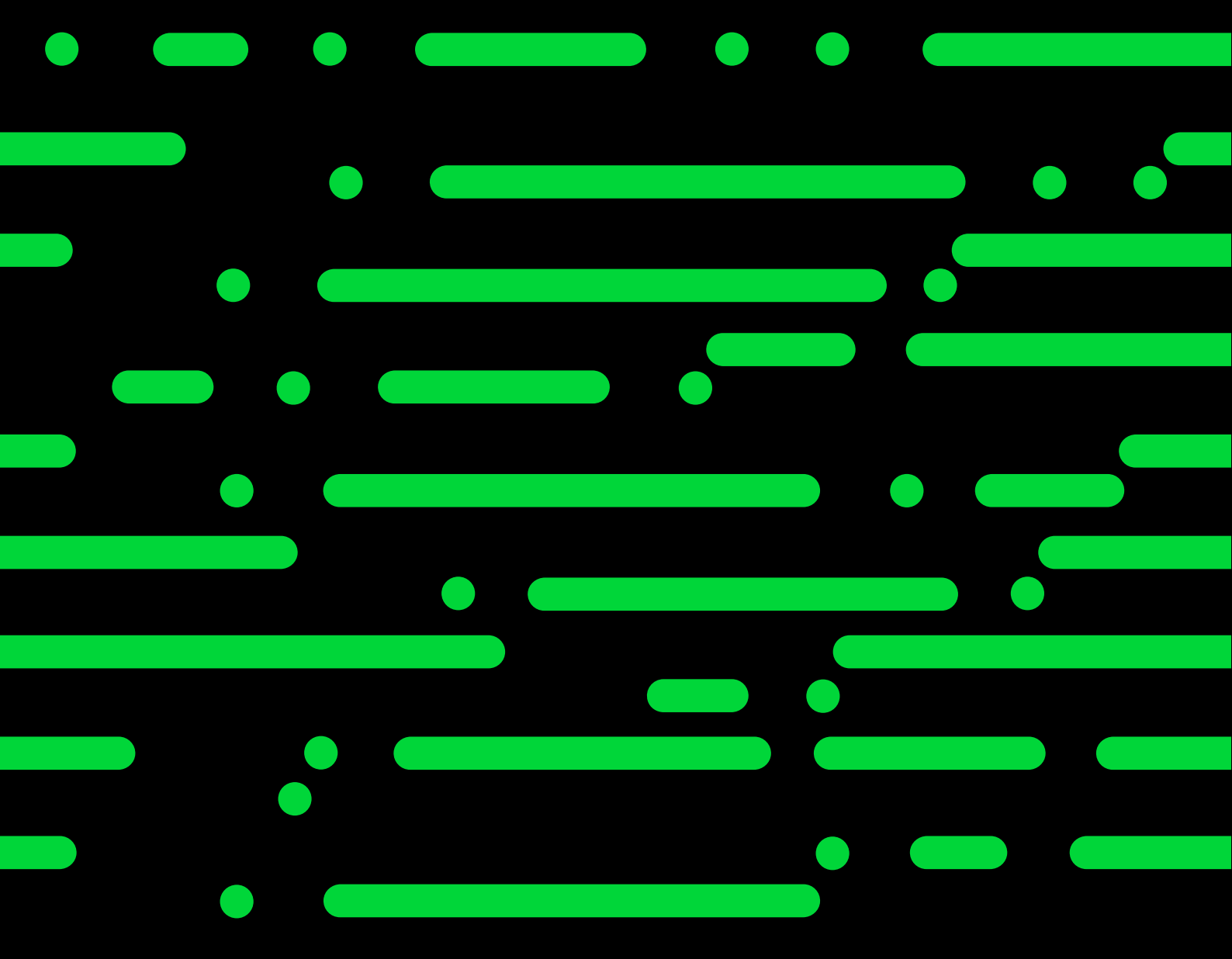
Integrating Sage CRM with your accounts system ensures each department is working with the same information and communicating in the same way. The result is greater insight into business performance, with more efficient processes, improved productivity, and communications.



Your Sage business management & integrated CRM solution

Integrated to your account system, Sage CRM can:

- Organise accounts information into one reliable source
- Show payment history, order status, quotes, orders, shipments and more
- Maintain control and data integrity for each employee
- Streamline processes for onboarding customers and suppliers.



Extend the power of your
Sage Business Management
Solution right across
your business, giving
you end-to-end
visibility, so you can
make informed
business decisions.

Visit our website:
[sage.com](https://www.sage.com)

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