



Discover true business freedom

Experienced, trusted professionals helping you to get the most out of your software.

Sage Business Partner

Customer Relationship Management

Managing your customers

Sage 200 integrates with Sage CRM, helping you to manage your customer relationships, and offer the highest quality of service and support.

It has a wide range of functionality including lead and campaign design, sales forecasting and opportunity functions. Coupled with its comprehensive workflow capability and rich integrations into other line of business systems, Sage CRM is a fully rounded and rapidly deployable system to enable you to manage your customer relationships effectively.

And because Sage 200 works together with your accounting and stock processes, you get an informed view of the customer, helping you deliver joined-up customer service throughout the whole of your business.

Build strong customer relationships

Maintain one view of information about your customers, including financial, commercial and communications information. Giving everyone in your business the same view of the customer, helping all of your teams provide consistent and effective customer service.

Manage customer services

With a unified customer view, Sage 200 can help you quickly respond to customer enquiries and track communications.





Find the answers quickly

Within Sage 200 you can build a central knowledge bank containing answers to known issues or questions, so your customer services team can quickly find the information the customer needs.

Monitor customer service performance

Sage 200 helps you measure customer service levels with detailed reports which can show call volumes, case resolution times, communications and follow up statistics.

You can show your customers how you are performing against service level agreements with easy to understand graphical and visual reports.

An informed view of the customer

Sage 200 brings together financial and commercial information with customers' data, so everyone in your business gets a complete picture of the service you offer.

For example, a customer services team can view contacts, leads, opportunities or cases all in the same place; giving them accurate and up-to-date information to help them provide consistent and excellent customer service.

Insight-driven sales management

Business accelerators for sales deliver powerful insight to optimise sales performance including:

- Management dashboards that display a range of KPIs, charts, reports and leaderboards for better insight and trend analysis
- Preconfigured alerts and notifications help ensure management are getting realtime updates on their business KPIs as they happen
- Sales workflows that can be optimised to suit your unique business needs. These include workflows for shorter sales cycles as well as longer sales processes and cross-selling.

[Only available with Sage 200 Professional](#)

Sage Business Partner

***RUN DIFFERENT.
GROW DIFFERENT.
WORK DIFFERENT.***



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