



Sage CRM | Marketing, Sales & Service | Supporting every business.

# Bringing the Front & Back Office Together

Extend the power of your Sage Business Management Solution right across your business, giving end-to-end visibility, so you can make better informed business decisions across your business 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 marketing teams reach the right people, at the right time.

## **Accelerate and focus sales activities**

Work on the most profitable activities to grow a business.

## **Provide an excellent customer experience**

Delight customers and outperform the competition.

## **Harness the power of an integrated CRM solution**

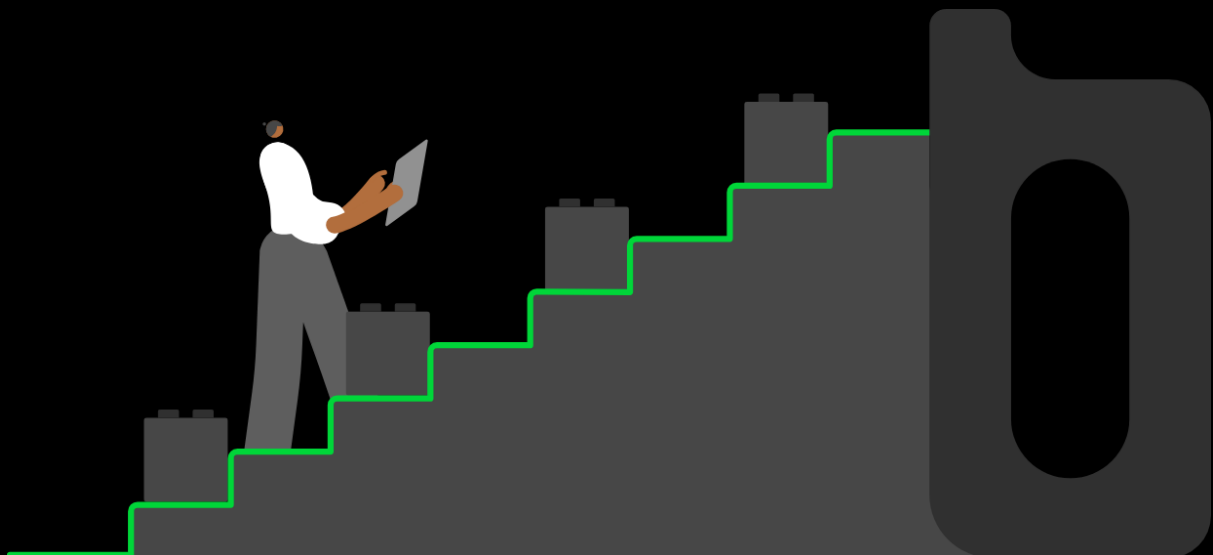
Automate processes within any business and do more for less.

# Sage CRM is for every business, anywhere.

Owners or managers of companies already know the benefits of transactional systems – accounts or enterprise resource planning (ERP) solutions – to ensure smooth business operations.

**Connecting the ‘front office’ to the ‘back office’ – using a CRM tool - increases efficiencies and productivity across a company.**

Sage CRM can help every business optimise their profitability, operational efficiency, and customer satisfaction. It’s all about implementing & supporting customer-centric processes for employees.



# What Sage CRM does.

**Ensure people work on the right thing, at the right time.**

Reduce data and work duplication with employees by updating a single, central database, not patching business processes together.

Make better decisions by providing managers and employees enhanced visibility over their internal processes and knowledge of their outcomes.

Become more customer focused by allowing departments to track key customer information and making it available throughout the business.

The image displays two overlapping screenshots of the Sage CRM web application. The background screenshot shows the 'Interactive Dashboard' with a navigation menu (Dashboard, Calendar, Calendar List, Contacts, Leads, Opportunities, Forecasts, Cases, Shared Documents, Preferences, Groups) and several data widgets: 'My Open Opportunities' (a table of sales opportunities), 'My Calendar' (a calendar view), and 'My Companies' (a table of company records). The foreground screenshot shows a detailed view of a company record for 'Gatecom Inc.', including contact information (Phone: 1206 345-9572, E-mail: info.GatecomInc@demosaagecrm.com), a narrative section with a '2 minute read time', and sections for 'Address', 'Communication', and 'Sales'.

**Sage CRM** My CRM Team CRM Reports Marketing

Dashboard Calendar Calendar List Contacts Leads Opportunities Forecasts Cases Shared Documents Preferences Groups

**Interactive Dashboard**

Sales Dashboard New Dashboard Template

Dashboard Template – you must be an Info Manager or Administrator to edit and save changes

**My Open Opportunities**

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...	

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**My Companies**

Company Name	City	Website
Design Right Inc.	New York	http://www.dri.com

**Contacts**

Last Name
Allen

**Sage CRM** My CRM Team CRM Reports Marketing

Summary Quick Look Narrative Dashboard Communications People Opportunities Cases Addresses

**Company:** Gatecom Inc.  
**Phone:** 1206 345-9572  
**E-mail:** info.GatecomInc@demosaagecrm.com

2 minute read time

**Company**

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).

# Connecting the front and back office.

## Making relevant data available when & where required.

Sage CRM bridges information gaps between departments and enables teams to collaborate on critical information. It supports customer facing departments throughout a company, for any type of business.

Sage CRM empowers business' to market & sell effectively. Front office teams will be able to view a "complete customer" – including financial information – directly within CRM. All without demanding significant time and effort from employees in their daily roles.

The screenshot displays the Sage CRM interface. The top navigation bar includes 'My CRM', 'Team CRM', 'Reports', and 'Marketing'. A search bar and utility icons are also present. The main content area is split into two panels.

**Left Panel: Reports → Customer Service → Open Cases by Product**

**Display options:** Screen, Export to PDF, A4, Landscape, Export to XLSX.

**Search criteria for report:**

- Cases - Status:
  - Matches any of the values:
  - Does not match any of the values:
- Is empty

**CRM Fusion Chart Report - Work - Microsoft Edge**

The chart shows a horizontal bar chart with 'Product ID' on the y-axis (1-7) and 'Assigned' on the x-axis (0-10). The bars are colored: 1 (green), 2 (purple), 3 (blue), 4 (orange), 5 (grey), 6 (grey), 7 (green).

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

**Right Panel: Administration → Advanced Customisation → Workflow**

**Workflow: Case Workflow**

**Available Rules:** New Case, Queue, Waiting, Investigating, Solved, Pass, Fail, Regression, Re-Assign, Accept.

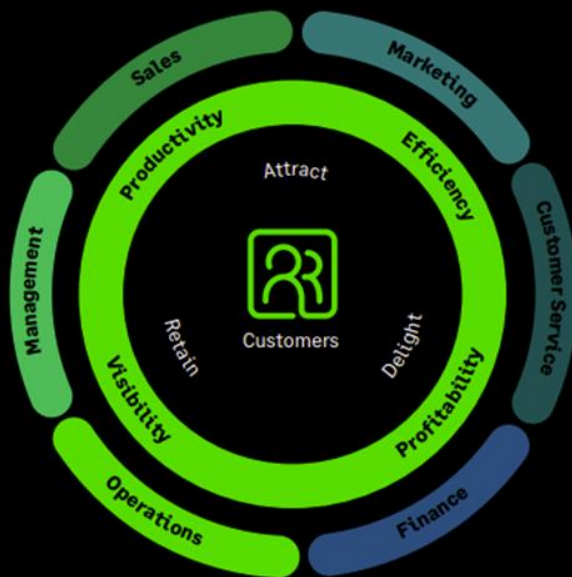
**Available States:** Start, Logged, Queued, Waiting.

The workflow diagram shows a flow starting with 'New Case', leading to 'Logged', then 'Queue'.

# Integrated processes.

Integrating Sage CRM with an 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.

## Integrated to an accounts system, Sage CRM can:



Your Sage business management & integrated CRM solution

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

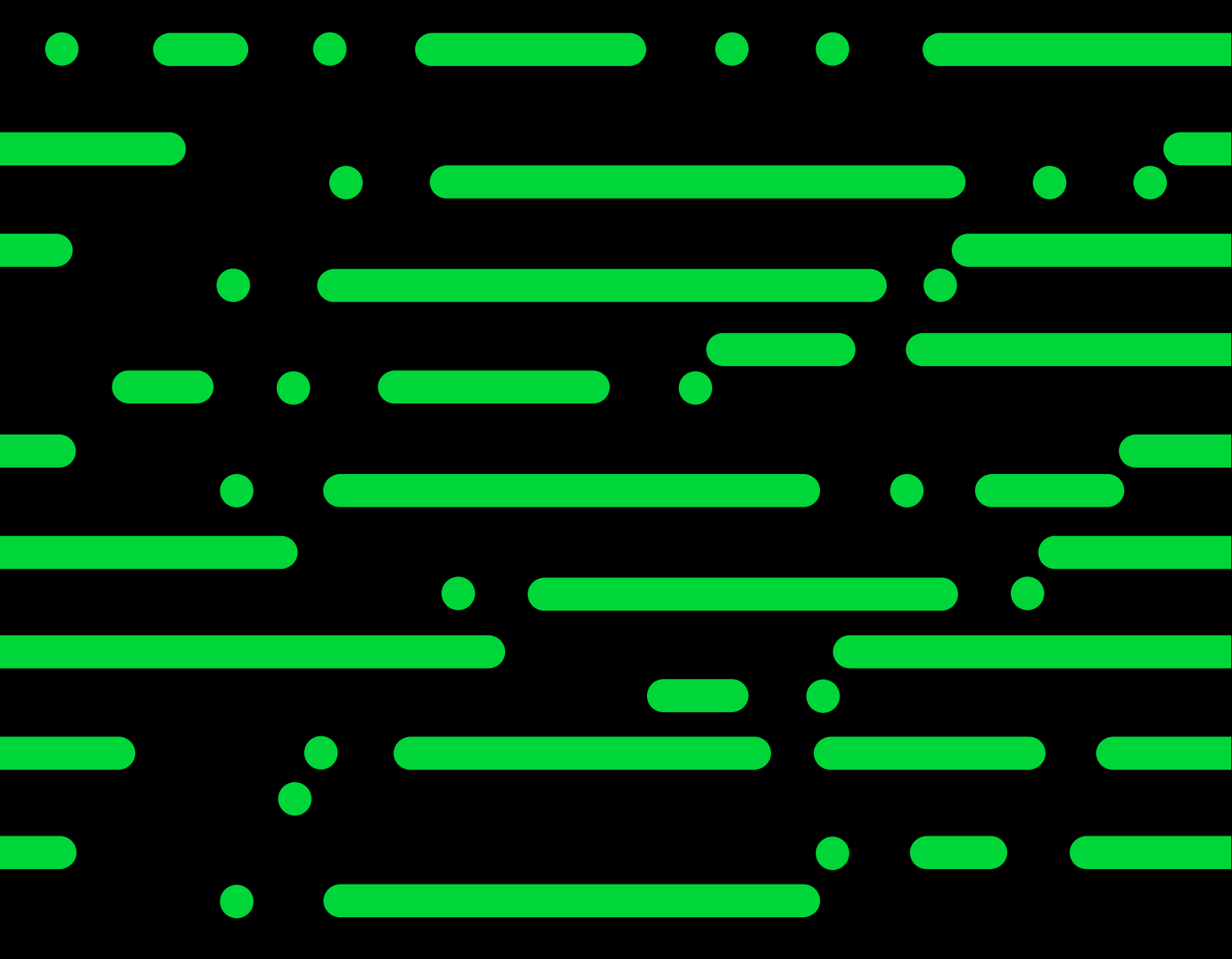
# Putting a business on the path to growth.

Sage CRM extends the power of an accounting system right across a business, giving visibility of front & back-office data, to make better business decisions.

## Drive your business growth



Sage CRM is an affordable, easy to use and highly adaptable for any size or 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.



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Know your business, grow your business.

# Sage CRM

Sage CRM meets the needs of small and medium sized companies around the world by being affordable, easy to use and adaptable. Sage CRM can help you improve your process & data flows across marketing, sales & service operations.

Sage

# Six reasons why Sage CRM is the ideal choice for growing businesses.



## **01 - Intuitive CRM your teams will want to use**

At Sage, we believe software shouldn't be difficult to learn, hard to update or challenging to use. This is the approach we took when we created Sage CRM. It's an intuitive CRM solution and one which you and your team can get started with and experience within minutes.

## **02 - Give your teams the tools they need to succeed**

Sage CRM supports your business by giving your sales, marketing, and customer service staff, a tool to help them get their job done efficiently. Your sales team can sell proactively, identifying cross-sell and up-sell opportunities, progressing opportunities from lead to close. Your customer service team can manage customer cases effectively, while your marketing team can easily manage their campaigns and generate a quicker return on investment.

### **03 - Sell smarter and accelerate sales team performance**

Your sales team drives the growth of your business, and they need to know they are working on the right leads at the right time. Using Sage CRM, you and your teams can review the stages of various sales deals, shorten the length of sales cycles, and increase revenue opportunities. With access to a wealth of information about their sales pipeline, key opportunities and account activity, your salespeople are equipped to sell smarter and more efficiently, accelerating your sales performance.

### **04 - Gain valuable business insight**

Owners or managers of successful businesses depend on up-to date information and analysis about sales, marketing and customer services activities and performance. Sage CRM supports management with access to important information about their business KPIs in real-time so they can see how a business is performing and take corrective action when needed.

### **05 – Collaborate effectively across teams**

Employees shouldn't have to spend time updating various databases, stitching together information systems, and ensuring their files are up to date. With Sage CRM, you and your team can collaborate on and share up to date business information and put processes in place that help everyone become more productive and efficient.

### **06 – Adapt Sage CRM to suit the needs of your business**

Sage CRM is an ideal solution for companies looking to manage multiple areas of their business. Using Sage CRM you can plan events, oversee business projects, track competitors and more. You can easily establish standard workflows around key business processes and design follow-up activities around your unique business needs. This way, you can ensure your business is running as efficiently and effectively as possible. The adaptability of Sage CRM helps ensure you get the most from your CRM investment – today and tomorrow.

# Integrating CRM to your accounting.

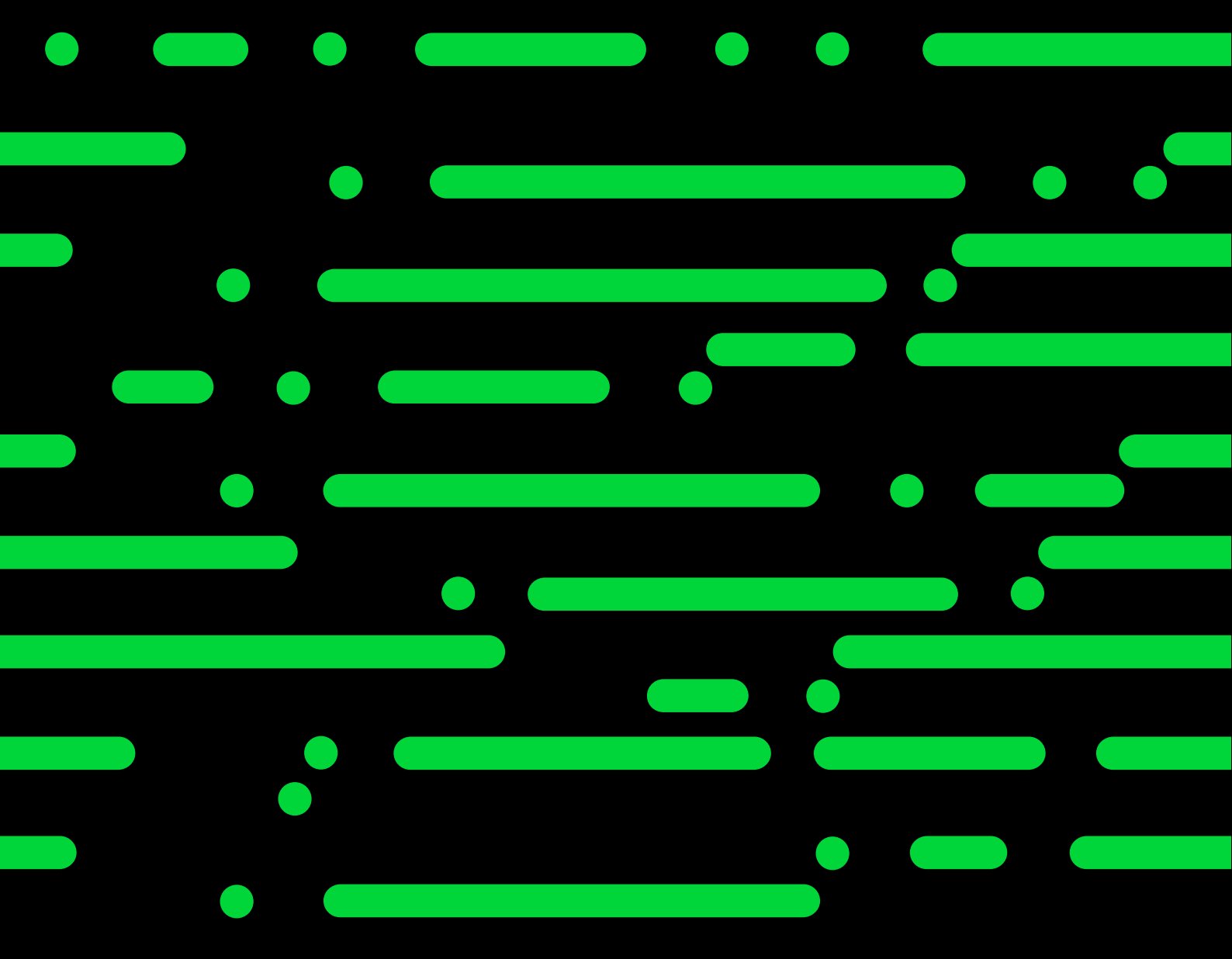
Integrating Sage CRM with your accounts system ensures each department is working with the same information and communicating in the same way. The result is greater insight into business performance, with more efficient processes, improved productivity, and communications.



Your Sage business management & integrated CRM solution

## Integrated to your account system, Sage CRM can:

- Bring front & back-office information together for a single, reliable, source.
- Show payment history, order status, quotes, orders, shipments and more.
- Maintain control and data integrity for each employee.



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