

**Volume 7  
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### Headline News

Sage Summit, the annual conference for Sage Software customers, will be held this year in Chicago, during the first week of November. You'll learn about software, connect with other Sage MAS 90 users, and generate lots of new ideas for growing your business. Go to [www.sagesummit.com](http://www.sagesummit.com) for the latest conference information, including great rates at preferred hotels.



SAGE MAS 90 SAGE MAS 200  
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## New SageCRM Integration Link

If your company is like most, different types of customer information are kept in two or more applications. This requires a fair amount of duplicate data entry to keep both systems current. This lack of a central view of customer information impacts the effectiveness and efficiency of both your front office customer service and sales staff, and your back office accounting and finance staff.

For example, when the sales team closes a sale, information must be entered into the contact management or customer relationship management system (CRM) and then be rekeyed into the accounting system by the accounting staff.

Sage Software has released a powerful new integration link between Sage MAS 90 ERP and SageCRM. It can spare you the unnecessary overhead cost of redundant data entry and help you reduce errors and keep information consistent between systems.

SageCRM is an award-winning customer relationship management solution that is flexible, customizable, and easy to learn. Here is a brief overview of SageCRM and details of how the new integration can benefit your company.

### About SageCRM

SageCRM is an on-site CRM solution that is both easy to use and fast to deploy with out-of-the-box but configurable business processes. It provides enterprise-wide access to vital customer information anytime so you can manage your business with an integrated approach to sales automation, customer care, and marketing.

### Sales Automation

SageCRM puts you in complete control of your sales pipeline, allowing sales team members to effectively manage, forecast, and report on all phases of the sales cycle. You can easily view and analyze all current and historical account details and activities, manage multiple accounts and opportunities, and automatically distribute leads to sales professionals—around the office or around the world.



Create sales orders and quotes within a familiar interface while tracking the opportunities within SageCRM.

SageCRM provides your sales team members with instant access to vital customer data, including reports and graphs, quotes, forecasts, and historical account details. They will be able to perform on-the-spot analysis, make informed decisions with the data to back them up, and eliminate bottlenecks that typically lengthen the sales cycle.

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# New SageCRM Integration Link For Sage MAS 90 CONTINUED

## Marketing Automation

Use SageCRM to plan, schedule, launch, and track marketing activities within a campaign. With full visibility into your marketing activities, you can evaluate which campaigns are most successful, ensuring the best use of your marketing resources.

## Customer Care Automation

SageCRM helps you build and maintain lasting relationships by delivering real-time access to the relevant customer data your staff needs to provide effective support. Imagine the power of having purchase, call, and escalation history, interactions, support cases, e-mail communications, and documents all centrally located and available to your support team. Build a knowledge base of problems and associated resolutions to speed call handling and improve your overall service levels.

## Web Self Service

Use SageCRM to allow your customers to log cases, access information, and request your firm's services and support over the Web at any time. You can create customized customer and partner portals to deliver information based on preferences, requests, and history.

## Integration With Sage MAS 90

The new SageCRM integration with Sage MAS 90 is seamless; you can look up customer contact information, enter a sales order, perform customer maintenance, and access other Sage MAS 90 information directly from SageCRM. The data between the two systems is synchronized automatically according to various parameters you specify.

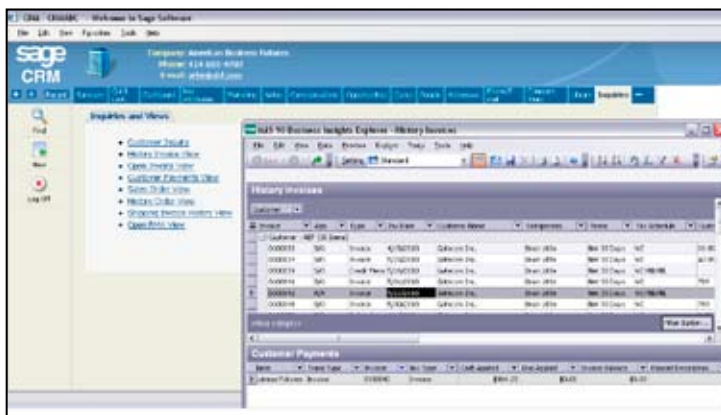
## Generating Accurate Quotes

Empower your sales team to work within SageCRM and generate accurate and detailed quotes and orders. There's no need for staff to learn a new order entry system, they will work in the familiar Sage MAS 90 Sales Order screens to generate orders and quotes.

From within SageCRM, staff can launch the Sage MAS 90 Sales Order Entry task and create quotes and orders as if they were working directly in Sage MAS 90. Orders and quotes will

use the customer-specific pricing you've established in Sage MAS 90. Inventory availability is displayed and updated just as it would be if the order were created in Sage MAS 90.

The advantages of performing this task from SageCRM are significant. As a quote or an order is generated, SageCRM records the activity allowing staff to schedule follow up meetings and track that opportunity as it turns into a sale. The order can be tagged to a specific marketing opportunity in SageCRM, allowing you to track the sales resulting from various campaigns, for example.



Launch Business Insights Explorer from within SageCRM to uncover detailed customer account information.

## Keeping Information Current

As your sales team members are speaking with a customer, they can record an address change, add a new contact, update an e-mail address—essentially anything they could do from within Sage MAS 90 Customer Maintenance. The advantage is that the two systems are automatically synchronized. This means the information is updated in both Sage MAS 90 and SageCRM.

## Insightful Queries

In an earlier issue of this newsletter, we introduced you to the powerful new Business Insights Explorer (BIE) tool that is now part of Sage MAS 90 version 4.2. You'll have access to BIE within SageCRM, allowing you to navigate, sort, query, and drill down into Sage MAS 90 from within SageCRM.

From the Inquiries tab in SageCRM, you can launch various BIE views. And just as you could if you were working within Sage MAS 90, you can customize each BIE view, drill down into related underlying data, and even create new views.

With this integration link you can deliver selected back office data to your front office workers. Now your sales staff can answer customer questions without delay and without troubling your accounting staff.

## Business Rules And Security

The business rules you've established in Sage MAS 90 are honored within SageCRM. For example when creating a sales order, users will be notified if a customer is on credit hold or has exceeded the credit limit.

The role-based security established in Sage MAS 90 is enforced within SageCRM.

## Fearless CRM

You may have heard horror stories about long, expensive CRM implementations. No such worries with SageCRM. You'll find SageCRM easy to deploy, easy to learn, and easy to use. It's easily customizable to the way you do business, so your team can be productive right from the start. The innovative Training and Coaching tool within SageCRM assists users in getting started quickly using quick tips, videos, and wizards.

## Availability

SageCRM is available for Sage MAS 90 and 200 version 4.2 and higher. Call us for details and a demonstration of the power of SageCRM.

With the addition of this latest integration, you now have three CRM integration options available for your Sage MAS 90 solution: SageCRM, Sage SalesLogix, and ACT! by Sage. Call us to discuss how you can increase your efficiency by integrating your front and back office systems. ☆