



Sage CRM - 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 analyse all current and historical details and activities, manage opportunities, and automatically distribute leads to sales professionals around the world.

Using Sage CRM's user configurable dashboard means your sales team can have all their sales information at their fingertips ensuring their buy-in. Sage CRM enables your sales team to make more sales with less effort.

Sales Forecasting & Reporting

- Accurate, timely forecasts allow your sales people and managers to make their own assessment of all leads, ensuring no leads are dropped or lost
- Point-and-click reporting and graphs allow your sales teams to access data for on-the-spot analysis and decision-making

Management of Vital Opportunities & Leads

- Track leads from first contact to final sales, ensuring time and energy is spent on the deals that are most likely to close
- Manage and analyse all current and historical account details, making it easy for your sales team to identify and recruit new customers and resell to existing ones

Build & Maintain Profitable Customer Relationships

- Deliver superior customer service by having the most up-to-date and complete customer information at your fingertips
- Create more up-sell and cross-sell opportunities

Account & Activity Management

- Use escalation and reassignment of leads to ensure that the employee most qualified to handle the situation addresses your client's needs





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- Configure alerts to trigger literature fulfilment, follow-up appointments, call-backs, daily tasks and much more
- Use security level assignment to ensure that only the right people see information relevant to them

Territory Management

- Automatically route leads to the right sales person based on territory rules
- Easily create, merge and move territories and the data associated with them
- Gain insight into sales effectiveness and performance by territory

Graphical Reporting

- Filter data any way you choose with graphical forecasting and reporting features
- Use system default reports or easily create new reports with a reporting wizard that walks you through the process

Escalation & Notification Alerts

- Ensure business opportunities aren't missed by sending real time alerts to the right individuals based on the role you define for them
- Deliver periodic messages to sales managers, summarising critical opportunity and forecast information for their direct reports

Quotes & Order Entry

- Generate sales proposals, automatically reflecting local customer currency, customs charges and taxes
- Access current product information, integrate with our accounting or your existing legacy systems and deliver the most up-to-date quotes *

'Stay on Top' Time Management

- Improve on business and personal performance with onscreen reminders, notification alerts, automation of literature fulfilment and the simplification of other non-revenue generating activities
- Monitor data proactively and automatically notify management of key business indicators



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Access Anywhere Anytime

- Work offline or work online over a network or the Web, seamlessly synchronise between the two*

*** Unavailable or limited when using the software in an on-demand model.**