

Sage CRM is an easy-to-use, fast to deploy, feature rich, low cost of ownership internet-based CRM solution designed to introduce the real benefits of CRM to mid-sized companies.

Sage CRM, is built to enhance and expand on these principles bringing the productivity and connectivity tools that will allow companies to sell to and service their markets better and faster and allow companies to stretch their CRM system further.

## Features

### Enhanced Offline/Laptop Client

- Benefit from an offline client, designed to be used with our CRM system when using an unconnected laptop
- The Offline Client is easy to install, simply download the CRM Offline Client Installer and install the Offline Client on your laptop
- Offline Client is compatible with all databases supported by CRM

### Global Document Library

- Utilize the new Global Document Library to make corporate documents more accessible to all users
- Documents can be easily created and uploaded to the Global Document Library
- Users can perform document merges for templates they have saved locally, or they can merge Global Templates
- Access documents in the central library and send them as email attachments

### Quotes & Order Entry

- Sage CRM adds a stand-alone quoting and order entry module, for customers who do not wish to integrate to their existing accounting system
- Produce and save multiple quotes per opportunity, promote quotes within Sage CRM
- View quotes and order information in pre-defined templates

### Product Line Information

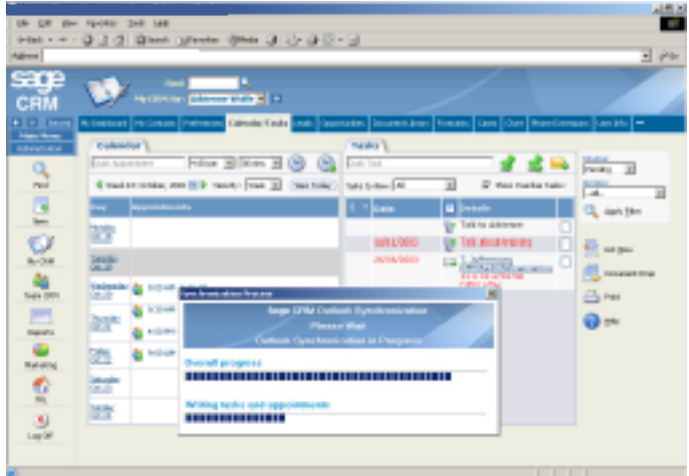
- Benefit from the upgraded Product Line Data Entry that allows for full pricing and product information to be held, changed and outputted within the Sage CRM system
- View multi-currency pricing, region-specific pricing, units of measure, product families - all a sales team needs to quote and invoice within the CRM system itself

### Enhanced Outlook Integration

- Continue to run your email, diary and contacts through Outlook with auto-sync recording all interactions in CRM
- All contacts, tasks, appointments, can be shared between systems to allow this information to be used throughout the organization
- View CRM entirely through Outlook, using CRM to enhance the quality and retention of information available to the user

### Online Help

- Receive enhanced online help to provide a better user experience
- Improved context sensitivity, easier navigation and an enhanced user interface
- Increased useful hyperlinks to help you find the information you need quickly



Automated syncing of contacts, tasks, appointments. Syncing occurs on login or logout, or can be manually initiated by the user as needed

### Web Services

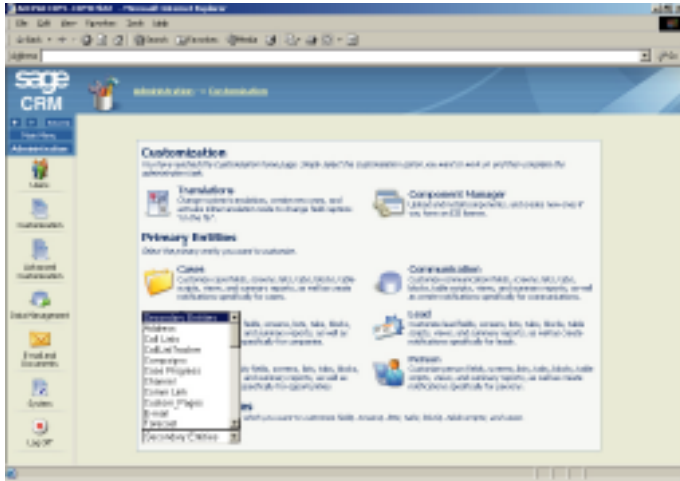
- The Web Service API (application programming interface) enables developers to securely access and manipulate CRM records remotely with SOAP (Simple Object Access Protocol) over HTTP using XML (Extensible Markup Language).
- It is possible to access a CRM server from another machine (typically another server) in order to read CRM data, add new data into the CRM system, and to update CRM records such as Companies, People, Opportunities, Cases or other exposed entities in the system.

### Escalation & Notifications

- All notification and escalation records will be stored on a dedicated Escalations Table. A new escalation service has been developed for polling to the Escalations Table
- Separate notification intervals are available to be set for each escalation rule
- System Administrators will have the ability to specify the number of on-screen reminders that are to be displayed on a user's screen at any one time

### More Features

- Calendar Printing – Daily and Weekly options
- Improved Date and Time Selection options
- Revised Administrator Menu for easier feature access
- New functionality to create Saved Searches via the Find area of the system



System Administration new features include the ability to toggle between the Main Menu and the Administration Menu.

**Call Sage on 480-368-3700 for further information**

### Sage CRM Solutions

Sage CRM provides CRM Solutions to mid-sized organizations. With 16 years experience in the development of products that provide businesses with the ability to manage and report on all customer-centred activity. There are over four million users of our CRM solutions, which can either stand alone or be fully integrated into existing systems, to give a single view of all customer and contact activity.

Sage CRM is an easy-to-use, fast to deploy, feature rich, low cost of ownership CRM solution designed to introduce the real benefits of CRM to middle-sized companies.

Sage CRM aggregates individual and group efforts across sales, marketing and support teams making people and companies more efficient at their roles.

Sage CRM delivers the tools entirely through a browser to take advantage of the huge efficiencies that the Internet offers in delivering business applications whether the system is hosted on the user's premises or by us.

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