



Sage CRM Sales

Sage CRM gives you the tools you need to sell more effectively. This easy to use application gives your sales users instant access to calendars, accounts, reports, pipelines, contacts and call lists – in short, Sage CRM empowers sales people to sell. All sales information is stored centrally and can be easily tracked and reported on, providing organisations with meaningful and up-to-date information on the performance of your sales team.

The screenshot shows the Sage CRM interface for user Susan Maye. It features a navigation menu with options like Recent, Quick Start, Dashboard, Calendar, Contacts, Leads, Opportunities, Forecasts, Cases, Shared Documents, Preferences, and Groups. A central bar chart displays the distribution of opportunities across stages: Qualified (2), Proposal Submitted (3), Negotiating (1), and Sale Agreed (1). Below the chart is a table titled '7 Opportunities, Page 1 of 1' with columns for Status, Description, Company Name, Person, Opened, Stage, Priority, and Territory. The table lists various deals such as '50 Users plus consulting', '100 User license', and '20 User Deal'. A 'Statistics for All Stages' box on the right provides summary metrics: No. Oppos: 7, Forecast: €690,372.00, Weighted Fcst: €237,418.40, Average Value: €98,624.57, Average Certainty: 53.57%, and Weighted Average: €52,634.59.

Sage CRM gives you a snapshot view of all opportunities within your sales pipeline, allowing you to effectively analyse and manage deals at every stage.

Features	Benefits
<p>Customer Awareness</p> <p>It's easy for everyone in your company to retrieve the most up-to-date and complete customer information within Sage CRM.</p>	<p>Helps organisations to have a better view of their customer and deliver superior customer service.</p>
<p>Pipeline Management</p> <p>The introduction of Sage CRM will allow your sales teams to effectively analyse and manage their sales pipeline, from first contact as a lead to final sales closure, with the ability to review the history of every account.</p>	<p>Purchase patterns and sales performance are clear with Sage CRM.</p>
<p>Sales Forecasting and Graphical Reporting</p> <p>Sage CRM provides Point and Click reporting and graphs, along with accurate and timely graphical forecasts which are accessible by your sales representatives and managers alike.</p> <p>You can use system default reports or easily create new reports with the aid of our reporting wizard.</p>	<p>Enables sales teams and management to access data for immediate analysis and decision making.</p> <p>Delivers on-demand reports and ensures effective communication and realistic forecasts.</p>
<p>Calendar Management</p> <p>Sage CRM provides sales users with a complete diary with daily, weekly and monthly views. In addition, you can make onscreen reminders and notification alerts available to all sales team members.</p>	<p>Increases efficiency, punctuality and convenience.</p>

Features	Benefits
<p>Workflow, Escalation and Notification Alerts</p> <p>Sage CRM includes easy-to-use point and click technology which makes it straightforward for you to organise the sales process, coordinate and fill diaries and schedule new tasks. You can introduce the in-built workflow out-of-the box or customise it to reflect your business process.</p> <p>Your sales managers can receive periodic messages summarising critical opportunity and forecast information for all staff that report to them.</p>	<p>Automates the sales process, enables sales to be more effectively managed and maximises sales effectiveness.</p> <p>Ensures business opportunities are always retained and worked on.</p>
<p>Complete Bidirectional Outlook Integration</p> <p>With Sage CRM, it's easy for you to access your CRM calendar and contacts through Microsoft Outlook. You can automatically synchronise all interactions with Sage CRM, meaning that contacts, tasks and appointments are automatically updated in both systems.</p>	<p>Encourages organisational transparency within the business and enhances the quality of information available to the user.</p>
<p>Account and Activity Management</p> <p>With Sage CRM, you can easily escalate and reassign leads and automate follow-up activities. We have also introduced simple and straightforward field-level security.</p>	<p>Guarantees that leads are handled by the most qualified people and allows the option of only allowing relevant parties to see certain information.</p>
<p>Quotes and Order Entry</p> <p>Sales users can automatically generate sales proposals using predefined templates. The most up to date quotes are delivered with access to the latest product information.</p>	<p>Maximises efficiency and reduces the margin for error.</p>
<p>Territory Management</p> <p>You can set up Sage CRM to automatically route leads to the relevant sales representatives based on territories. It is also easy to create new teams and re-assign ownership and view marketing campaigns, response rates and associated sales revenue by territory.</p>	<p>Gains insight into sales effectiveness and performance by territory.</p>
<p>Document Sharing</p> <p>Sage CRM automates and simplifies the process of sending out literature.</p>	<p>Decreases administrative and other non-revenue generating activities.</p>

About Sage CRM

Sage CRM is an easy-to-use, feature-rich Customer Relationship Management solution which is quick to deploy with out-of-the-box but configurable business process automation. Access methods include both hosted and deployed models through a web browser meaning Sage CRM takes advantage of the huge efficiencies that the Internet offers in delivering business applications.

About Sage

Sage is a global provider of end-to-end business management applications for small to mid-size businesses. Look to Sage for fully integrated software that delivers high performance, advanced functionality, cross-product integration and unmatched freedom of choice. Sage provides companies with the solutions they need to enhance competitive advantage and increase profitability. For more information, visit www.sage.co.uk or contact us on **0845 111 9988**.

If you would like this information in an alternative format please contact Customer Care on **0845 111 66 66** or email access@sage.com



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