

SageCRM integrated with Sage 100



Presented By:

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SageCRM Overview

- **SageCRM is a web-based mid-market CRM solution. It runs on a server in your environment or in your hosted environment**
- **Runs from a Browser (Chrome, Edge, etc.) No need to install software on every workstation.**

Core CRM Functionality

- **Manage your list of customers, prospects.**
- **Enter in important sales activities and attach emails**
- **Pull up Company and Person records in CRM and see who communicated with them last, and what was discussed. Emails are also attached.**
- **Schedule and manage follow-ups**
- **Integration with Outlook/Exchange**
- **Build a library of standard Email Templates**

Outlook Integration with SageCRM - Accelerator

- **We recommend a 3rd party tool called Accelerator to attach emails and integrate Outlook with SageCRM**
- **A separate SageCRM window opens up within your Outlook session**
- **A powerful tool to make your CRM users more efficient**

Accelerator addon for SageCRM

The screenshot displays the Microsoft Outlook interface with the Accelerator add-in window open. The Accelerator window shows a 'Person Summary' for Jeff Bonell, including his first and last names, company (Effective Solutions), title (Consultant), area code, phone number (414-377-4680), and business email (jeff@effsolutions.com). A red callout box is overlaid on the screen, pointing to the Accelerator icon in the Outlook ribbon and the Accelerator window. The callout box contains the following text:

Accelerator opens a mini SageCRM window in your Outlook Session.

With Accelerator you can:

- Confirm the contact is in SageCRM
- Quick add the contact to CRM
- Attach Outlook emails to CRM
- Create Opportunities from Emails
- Create Cases from Emails
- Tag emails to Opps and Cases so they auto reference the record in CRM
- And many more features

The Outlook interface shows an email from Jeff Bonell with the subject 'SDM UserSettings Table scripts'. The email body contains SQL scripts for adding records to the usersettings table. The Accelerator window is titled 'Accelerator' and has a search bar and a 'Details' tab. The 'Person Summary' section is expanded, showing the contact's information. The Outlook ribbon includes the Accelerator icon, which is highlighted by a red arrow.

Base Integration with Sage 100

- **Pull all Sage 100 customers into CRM**
- **Convert prospect records in CRM to Customers in Sage100**
- **Customer record updates sync between systems (address, phone, salesrep)**
- **Generate Quotes and Orders from CRM**
- **Use CRM Opportunities for Quote Follow-up**


Advanced Sage100 Integration

- **We have written scripts to bring over additional key info from Sage100**
 - **Key sales data (Last Inv Date, YTD Sales, etc)**
 - **Quotes**
 - **Open Orders**
 - **Sales Orders**
 - **Invoices**
 - **Items Purchased**
- **You are also able to perform lookups on key sales data fields**

Display Key Sales Fields in CRM

sage CRM My CRM ▾ Team CRM ▾ Reports ▾ Marketing ▾ Search ▾

Summary Quick Look Dashboard Marketing Notes Communications Documents Opportunities Cases People Quotes Open Orders Invoices Item Summary PL Summary Items Purchased
Tradeshows ---

Company:  **Maverick Papers**
Phone: 312 861-1200 **Sage 100 Company:** ABC
E-mail: info@sage-sample.com **Company Name:** ABC Distribution and Service Corp. **Sage 100 Customer No:** MAVRK

Company ▶

Company Name: Maverick Papers	Status: Active	Type: Customer	Account Manager: Deb Taylor	Territory: Worldwide
Lead Source: Web	Lead Details:	Market Segment: Distribution	Record Type:	Website: http://www.maverickpapers.com
Parent Company: -None selected-	Link to Referring Company: ABC Bakery ☎ 444 555-5555	New Customer Status: Waiting for Approval	Credit App Received: <input type="checkbox"/>	W9 Received: <input type="checkbox"/>
Business Description: Largest paper supplier in the Midwest test.	Competitor Info: Currently uses ABC Supplier as well, trying to get more of their biz.	No Comm 60 days: False	No Comm 90 days: False	
Last Comm Date: 11/08/2018	No Comm 30 days: False	ShipTo Cust#:	ShipTo Code:	ShipTo Salesperson #:
ShipTo Parent: None selected.	ShipTo Division:			
Sage 100 ARDivision No: 01	Sage 100 Customer No: 01-MAVRK	Customer Type: T	Price Level:	Default Payment Type: CHECK
Terms Code Description: 2% Ten Days, Net 30 Days	Tax Schedule Description: Milwaukee	Salesperson Number: 01-0300	Customer Status Description: Active	
Last Inv Date: 06/20/2018	Last Payment Date: 07/31/2018	Avg Days to Pay: 42	Credit Limit: \$ 10,000.00	Credit Hold: N
YTD Sales: \$ 2,378.75	PYTD Sales: \$ 0.00	YTD B(W): \$ 2,378.75	PY Sales: \$ 1,535.00	PY2 Sales: \$ 2,246.00
Current Balance 0-29: \$ 2,531.42	Balance 30-59: \$ 0.00	Balance 60-89: \$ 0.00	Balance 90-119: \$ 0.00	Balance 120+: \$ 0.00

Advanced Sage100 Integration - Transactions

Review Quote, Order and Invoice Transactions from within SageCRM

sage CRM My CRM Team CRM Reports Marketing Search 1 ☆

Summary Quick Look Dashboard Marketing Notes Communications Documents Opportunities Cases People **Quotes** Open Orders Invoices Item Summary

Items Purchased Addresses Phone/E-mail Tradeshows ...

Company: **Maverick Papers** Sage 100 Company: **ABC**
Phone: 312 861-1200 Company Name: **ABC Distribution and Service Corp.** Sage 100 Customer No: **MAVRK**
E-mail: info@sage.sample.com

6 RecordsFound, Page 1 of 1

Company Name	SalesOrderNo	PO Num	Order Date	Order Status	SalespersonNo	Non-Taxable Amt	Taxable Amt
Maverick Papers	0000202		11/12/2018	N	0300	0.00	262.00
Maverick Papers	0000201		11/08/2018	N	0300	0.00	427.95
Maverick Papers	0000194		10/15/2018	N	0300	0.00	393.00
Maverick Papers	0000193		10/15/2018	N	0300	0.00	135.00

Click on an Order Number and see the line items from within CRM

2 RecordsFound, Page 1 of 1

SalesOrderNo	Sequence No	Item Code	Item Code Desc	Comment	Qty Ordered Revised	Qty Backordered	Qty Shipped	Unit Price	Extension Amt
0000201	00000100000000	1001-HON-H254	HON 4 DRAWER LETTER FLE W/O LK		3.00	0.00	0.00	131.00	393.00
0000201	00000200000000	2480-8-50	DESK FILE 8" CAP 50		1.00	0.00	0.00	34.95	34.95

Advanced Sage100 Integration – Item Info

Item Summary, PL Summary and Items Purchased tabs

Purchases by Item Code									
Item Code	Item Code Desc	Product Line	YTD Count	YTD Sales	Prev YTD Count	Prev YTD Sales	YTD SALES DIFF	Previous Year Total	
VOG-CM-MSC	STORAGE CUBE	WF&A	4	\$1,100.00	0	\$0.00	\$1,100.00	\$0.00	
1001-HON-H252	HON 2 DRAWER LETTER FLE W/O LK	WF&A	5	\$407.40	0	\$0.00	\$407.40	\$0.00	
ARS-9301	ART SPECIALTY BRONZE LAMP	WF&A	3	\$359.85	0	\$0.00	\$359.85	\$0.00	
6655	PRINTER STAND W/ BASKET	PS&A	1	\$179.00	0	\$0.00	\$179.00	\$0.00	

Purchases by Product Line							
Product Line	YTD Count	YTD Sales	Prev YTD Count	Prev YTD Sales	YTD SALES DIFF	Previous Year Total	
WF&A	4	\$1,998.25	0	\$0.00	\$1,998.25	\$0.00	
PS&A	1	\$179.00	0	\$0.00	\$179.00	\$0.00	
FD&A	2	\$171.50	0	\$0.00	\$171.50	\$0.00	

Items Purchased

Export to Excel CSV

Column

Item #	Item Desc	Product Line	Inv Date	Inv #	Qty	Unit Price	Ext Amt
1001-HON-H254	HON 4 DRAWER LETTER FLE W/O LK	WF&A	03-01-2015	0100078	2	\$131.00	\$262.00
2551-3-50	DESK FILE 3 1/2" CAP 50	FD&A	03-01-2015	0100078	10	\$21.95	\$219.50
1001-HON-H252	HON 2 DRAWER LETTER FLE W/O LK	WF&A	02-11-2015	0100074	3	\$84.00	\$252.00

Quoting/Opportunity/Sales Forecasting

- **May be a fit for your business if you generate quotes and need a system to follow up on those quotes**
- **Best fit when deals are larger and take longer to close**
- **Quickly review what deals are expected to close this quarter and dollars associated.**
- **Track Won and Lost deals**
- **Track why deals were lost, look for trends**
- **Calculate Conversion Rates**
- **You can create Quotes for Prospects (not in Sage 100)**

Key Components of the Sales Opportunity

sage CRM My CRM Team CRM Reports Marketing Search [dropdown] [notification] [star] [clock]

Summary Quotes Orders Notes Communications Documents DocImages Tracking Relationships Residential Survey ...

Opportunity: Office Remodel **Phone:** 312 861-1200 Mobile
Company: [Maverick Papers](#) **E-mail:** don@effsolutions.com **Sage 100 Company:** ABC
Person: Annette O'Toole-Smith **Company Name:** ABC Distribution and Service Corp.

For

Company: [Maverick Papers](#) 312 861-1200 **Person:** [Annette O'Toole-Smith](#) 312 861-1200 Mobile

Details

Description: Office Remodel	Category: ReModel	Source: Phone	Architect: -None selected-
Details: Looking to remodel the front desk area and conference room	Opened: 06/20/2018 9:25 AM	Closed:	Initial Bid Contractors:
	Territory: Worldwide		

Status

Stage: Proposal Submitted	Status: In Progress	Forecast: \$ 25,000.00	Certainty%: 25
Assigned To: Deb Taylor	Team: Sales	Priority: Normal	Close By: 07/31/2018

Actions:
Current State: Quoted
▶ [Sold](#)
▶ [Reassign](#)

[Change](#)
[Continue](#)
[Next](#)
[Summary Report](#)
[Add to Group](#)
[Clone Opportunity](#)
[Help](#)


Generate Sage 100 quotes from SageCRM

The screenshot displays the Sage CRM interface. At the top, the navigation bar includes 'My CRM', 'Team CRM', 'Reports', and 'Marketing'. A search bar and notification icons are on the right. The main menu shows 'Quotes' highlighted with a red box. Below the menu, a summary card for an opportunity is shown, including details for 'Furniture', 'Maverick Papers', and 'Annette O'Toole-Smith'. The central window is titled 'Sales Order Entry (ABC) 11/8/2018' and contains a table with the following data:

	Item Code	Ordered	Back Ordered	Unit Price	Extension	Comment
1	1001-HON-H254	3.00	.00	131.000	393.00	
2	2480-8-50	4.00	.00	31.950	127.80	
3		.00	.00	.000	.00	

Below the table, there are fields for 'Description', 'Warehouse', 'Unit Of Measure', 'Shipped', 'Price Level', and 'Tax Class'. The 'Total Amount' is displayed as 520.80. On the right side of the window, a 'Status' dropdown is set to 'Active', and a 'Reference' field is present. A 'New Quote' button is highlighted with a red box, and a blue arrow points from it towards the table area. At the bottom of the window, there are buttons for 'Print Order...', 'Print Pick...', 'Recalc Price', 'Accept', 'Cancel', and 'Delete'.

Quote syncs down to SageCRM – Ready to Send


★
Quotes: Quote: 0000205: Last Updated: 11/13/18 03:33
Opportunity: Furniture
Company: Maverick Papers

Person: Annette O'Toole-Smith
Phone: 312 861-1200 Mobile
E-mail: don@effsolutions.com

Sage 100 Company: ABC
Company Name: ABC Distribution and Service Corp.

Quote Summary

Currency: \$ **Confirm To:** Annette O'Toole-Smith
Reference: Quote: 0000205 **Opened:** 11/13/2018 **Expiration Date:** 12/13/2018 12:00 AM **Status:** Active
Description: Last Updated: 11/13/18 03:33
Comment: **Include In Quotes Total:** **Billing Address:** Maverick Papers, 220 Michigan Ave., Suite 900, Chicago, IL 60601 **Shipping Address:** Maverick Papers, 220 Michigan Ave., Suite 900, Chicago, IL 60601 **Shipping Method:** SHIPPING FLAT
FOB:

- Continue
- View / Edit
- Promote to Order
- Merge to Word
- Merge to PDF
- Print Quote
- Send Quote
- Help

Line Items

Line number	Item Code	Description	UOM	Kit?	Comp?	Quantity	List Price (\$)	Quoted Price (\$)	Line Item Discount (\$)	Quoted Price Sum (\$)
1	1001-HON-H254	HON 4 DRAWER LETTER FLE W/O LK	EACH	N	N	3.00	131.00	131.00	0.00	393.00
2	2480-8-50	DESK FILE 8" CAP 50	EACH	N	N	4.00	34.95	31.95	0.00	127.80

TOTALS \$ 0.00 \$ 520.80
Discount Type: Percentage **Discount %:** 0.00 **Discount Amount:** \$ 0.00
Freight Amount: \$ 10.00



OEL WORLDWIDE INDUSTRIES, LLC
 PO BOX 445
 PALMER LAKE, CO 80133
 Phone: (719) 559-0951

Quote

Customer #	Quote #	Quote Date	Quote Expiration
00-2355556	0095178	08/09/2022	09/08/2022

Sold To:	Ship To:
JM TEST SYSTEMS 7323 Tom Dr. Baton Rouge, LA 70806 United States	JM TEST 7323 TOM DRIVE ATTN: PURCHASING DEPT. Baton Rouge, LA 70806 United States

PO Number	Ship Via	F.O.B.
MADDIE BOURGEOIS	FEDEX GROUND	
SalesRep Name	Entered By	Terms
Forrest Dyer	Zach Mills	Net 30

Item Code	Description	Qty	Price	Amount
AFW8-KFC-XL	8Cal-Coverall-HeadGear-XL-Khaki-Kit	1.00 EACH	328.00	328.00
/C	IN STOCK	0.00	0.00	0.00
Net Amount:				\$328.00
Less Discount:				0.00
Freight:				0.00
Sales Tax:				\$0.00
TOTAL:				\$328.00

Create a quote template in SageCRM to fit your needs.

Template is autogenerated when you click on SEND QUOTE

Quickly email the Quote – gets stored in CRM

Email

Template: Send Email Quote

From: System Administrator <sales@effsolutions.com>

To: don@effsolutions.com

To

CC:

CC

BCC:

BCC

Subject: Effective Solutions Quote: 0000424

Attachments: EffectiveSolutionsPartsAndService-Quote 0000424.pdf

Deb Taylor
Demo1 User
Harold Lloyd
Katie Oehler
Richard Krewson
System Administrator

Do not file this communication

Send E-mail

Cancel

Help

Source | | Styles | Format | Font | Size |

Dear Christopher,

Please find attached the quote as discussed. If you would like any further information, please contact me on or email me at sales@effsolutions.com.

Yours sincerely,

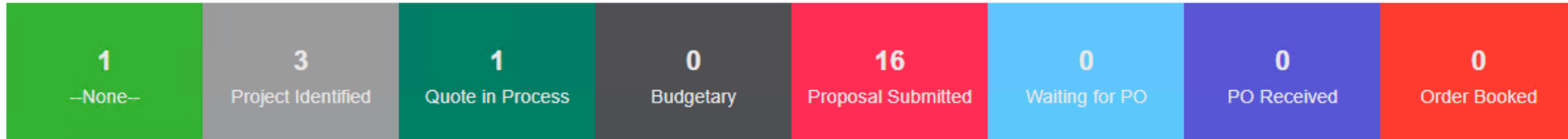
Don Grubor
Effective Solutions

TeamCRM Opportunity Pipeline



Team CRM for: Outside Sales ▾

21 Opportunities



Statistics for All Stages

Number of Opportunities: 23

Forecast: \$ 3,397,492.59

Weighted Forecast: \$ 925,996.34

Average Value: \$ 147,717.07

Average Certainty: 50.65%

Weighted Average: \$ 74,821.91

35 Opportunities, Page 1 of 2

Go to page ▶▶

Status	Company Name	Person	Description	Opened	Est Close Date	Stage	Forecast (\$)	Assigned To
↻	MHI-NSR	Darrell Lankford	USS San Antonio	08/31/2021		Project Identified	0.00	Ben Dore
↻	Acme Corporation	George Kramer	Office Furniture Upgrade	10/21/2016	10/28/2016	Proposal Submitted	25,000.00	Deb Taylor
↻	H&H Auto Parts	Winnie Spackman	New Conference Room	10/21/2016	10/31/2016	Project Identified	4,000.00	Deb Taylor
↻	Jones Industrial	Don Jones	New Furniture Project	10/25/2016	12/31/2016	Quote in Process	5,000.00	Deb Taylor

Status:
 ▾

Stage:
 ▾

Product Codes:
 ▾

Sales Culture / CRM Adoption

- **Companies that have the best CRM adoption rates incorporate Opportunities into their regular sales meetings**
- **CRM users are expected to update their sales opportunities before each sales meeting**
- **Opportunities closing this month/quarter are reviewed in the Sales Meetings**

Efficient Marketing – List Management

If you had a great new product or service that you wanted to let all of your customers and prospects know about, how quickly could you get that list together and send out a direct mail piece or email blast?

That is where CRM fits in. A single database of all of your Customers and Prospects with their contact information and key data points that let you target specific groups of contacts.

Case Management

- **Track issues as cases within the system**
- **Quickly see any open cases when you are looking at a customer record in CRM**
- **Use TeamCRM to manage all open cases**
- **Identify trends related to issues**
- **Build a knowledgebase of past issues**

Key Components of a Case Record

sage CRM My CRM ▾ Team CRM ▾ Reports ▾ Marketing ▾ Search ▾ 🔔 ☆ 🕒

Summary Notes Communications Documents Tracking Solutions Relationships ...

Case: 1-10097: Issue with Office Chair controls **Phone:** 312 861-1200 Mobile **ClickAddress:**
Company: [Maverick Papers](#) **E-mail:** don@effsolutions.com
Person: [Annette O'Toole-Smith](#)

For

Company: [Maverick Papers](#) 📞 312 861-1200 **Person:** [Annette O'Toole-Smith](#) 📞 312 861-1200 Mobile

Details

RefId: 1-10097	Description: Issue with Office Chair controls	Area: Install	Source: Phone
Customer Ref:	Territory: Worldwide	Created By: System Administrator	Created Date: 12/22/2016 2:19 PM

Status

Priority: Normal	Assigned To: Bob Smith	Team:
Stage: Investigating	Status: In Progress	
Problem Type: Setup/Installation	Solution Type: Replace component	
Problem Details: The height control on the chair is not working properly.	Solution Details:	Closed:

Actions:
Current State: Invest
▶ [Waiting](#)
▶ [Queue](#)
▶ [Solved](#)

[Change](#)
[Continue](#)
[Summary Report](#)
[Add to Group](#)
[Help](#)

Manage your Open Cases (TeamCRM)



Team CRM for:

29 Cases



29 Cases, Page 1 of 2

Go to page

Status	Created Date	RefId	Priority	Company Name	Person	Description	Stage	Assigned To
	11/21/2016 1:51 PM	1-10094	Normal	Maverick Papers	Annette O'Toole-Smith	Test Issue	Queued	System Administrator
	12/22/2016 2:19 PM	1-10097	Normal	Maverick Papers	Annette O'Toole-Smith	Issue with Office Chair controls	Investigating	Bob Smith
	01/06/2017 10:14 AM	1-10098	Low	Trustway Homes	Steve Clavette	Discoloration in Stone	Queued	Ron Jackson
	01/31/2017 3:09 PM	1-10099	Normal	Maverick Papers	Annette O'Toole-Smith	Work Injury	Queued	Deb Taylor
	02/02/2017 11:06 AM	1-10100	Normal	American Business Futures	Artie Johnson	Thingy not working	Logged	Ron Jackson
	04/13/2017 10:39 PM	1-10102	Normal	Effective Solutions	Bob Butcher	test case	Logged	Bob Smith

Status:

Stage:

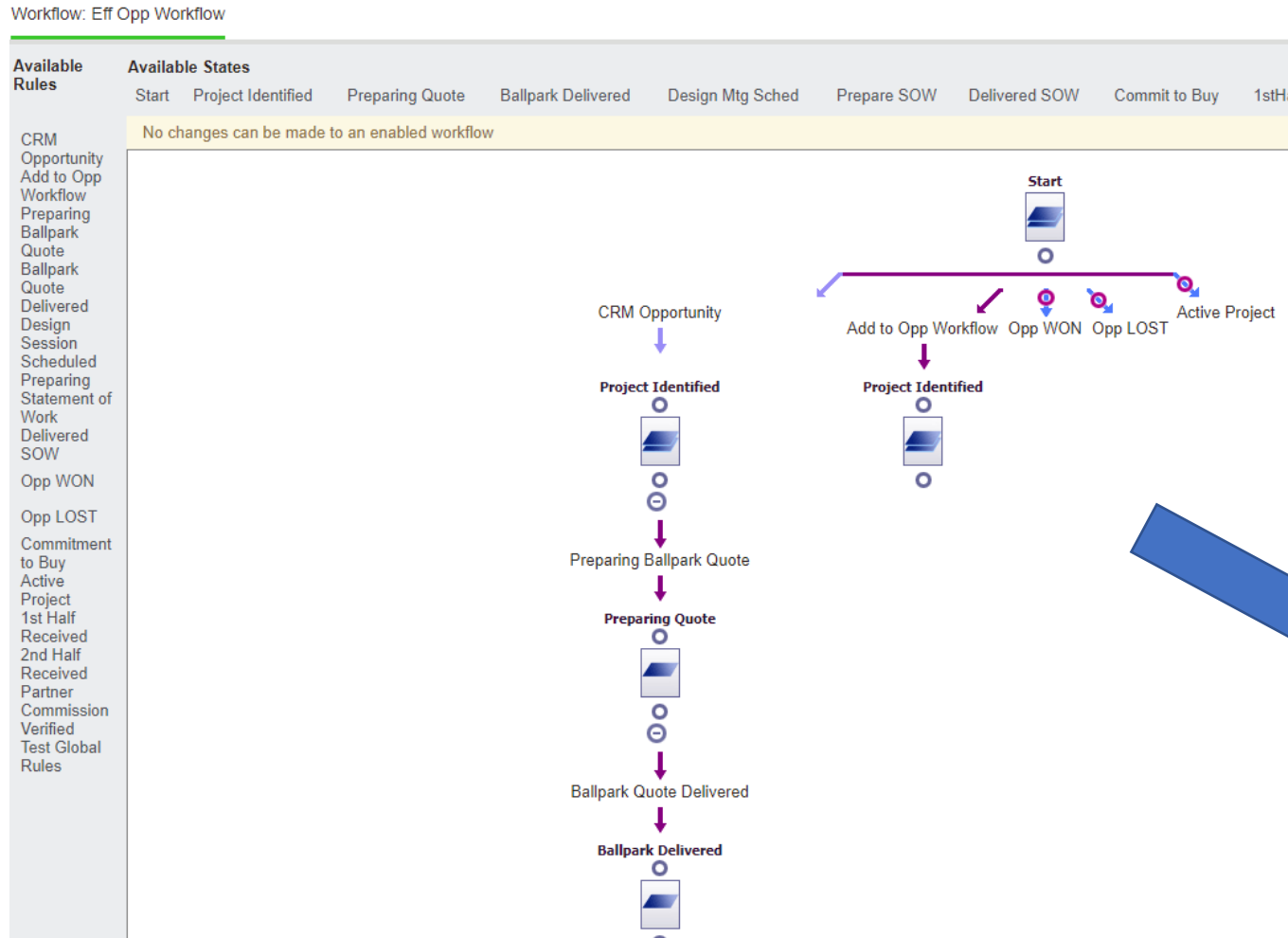
Priority:

Territory:

Workflows and Notifications

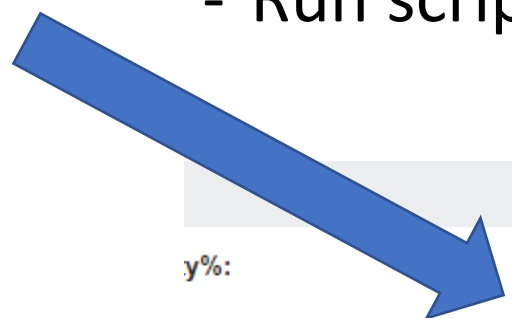
- SageCRM has robust Workflow capabilities.
- You can take manual processes within your organization, and make them electronic and flow through SageCRM.
- Commonly built for Opportunities, Cases and custom entities.

Workflow Example



Each workflow rule can:

- Update Fields
- Prompt to update fields
- Send email notifications
- Create Tasks
- Run scripts, and so much more



y%:

y:
118

Second Half Commission:

Actions:

- Current State: Project Identified
- ▶ Preparing Ballpark Quote
 - ▶ Active Project
 - ▶ Opp WON
 - ▶ Opp LOST

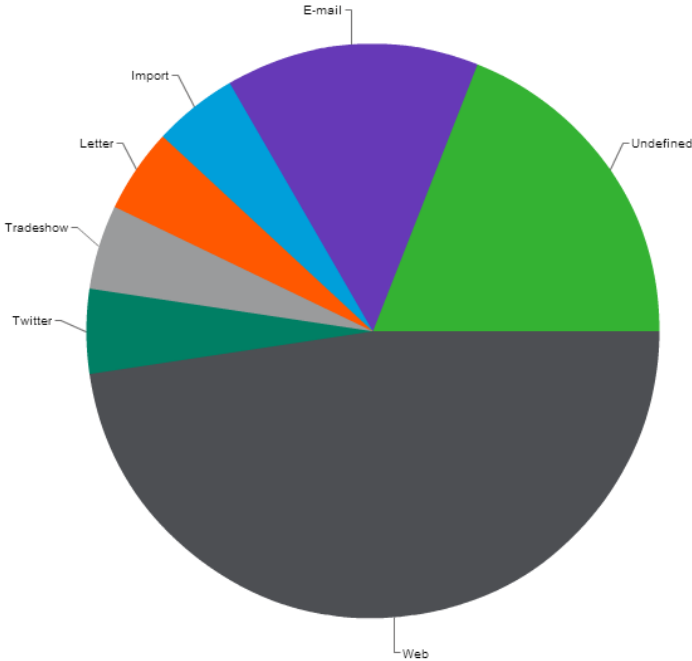
Measure and Report on CRM Activities

- **How many Leads came in?**
- **How many calls were made to Leads, Prospects and Customers?**
- **Who did my new salesperson talk to last week?**
- **How many new opportunities were generated?**
- **How many quotes were created this month, and how many were converted to orders?**
- **How many issues/cases were entered?**

Key Activity Report example

User ^	AddressChange	E-mail In	E-mail Out	Letter In	Meeting	Phone In	Phone Out	Referral Payment	To Do	Total
Dallas Kerley			1							1
Steve Stovall									4	4
Kathy Sergio		20	14		1		17			52
Tony Robinson	2	29	130			1	55		64	281
Elaine Panzeter		1								1
Kristen Gordon		3	3						1	7
Larry Carnell		10	57				28		1	96
Kimberly Graham		5	38				17			60
Mona Janes		1	10							11
Laurie Dely	1	3								4
Wendy Skemer		12	14							26
Stacey Kuzniasz										0
Britt Blakeley			6	1						7
Jon-Michael Whiteman			1							1
Michele Jacoby			1							1

Leads Generated by Source



Robust Dashboards and Reports

- **SageCRM has a robust Report and Dashboard engine**
- **Dashboards present key data to users as they go into CRM**
- **They are interactive, so you can jump to Company records from dashboard gadgets**

Interactive Dashboards

Eff Sales Dashboard Template New Dashboard Template Turn Sno Off Print H

Dashboard Template – you must be an Info Manager or Administrator to edit and save changes [Create a copy](#)

My Open Opps Chart

Stage	Count
Lead	11
Proposal Submitted	20
Sale Agreed	1

My Tasks

Status: Pending Due date: This year

Date / Time	Company Name	Person	Subject	Action	S
01/29/2021 12:40 PM	Maverick Papers	Annette O'Toole-S...	checkin call	Phone Out	F
01/08/2021 11:00 AM	Maverick Papers	Annette O'Toole-S...	Follow up on Invoice	Phone Out	F

Page 1 of 1 1 - 2 of 2 Quick Task

My Open Opps List

Description	Company Name	Person	Stage	Opened	Close By	Forecast
XYZ Print System	ABC Dealers	Jeff Bonell	Proposal Submitt...	07/16/2019 09:15 AM	2021-05-01 00:0...	\$ 250,000.00
New Induction F...	ABC Metals	Tiger Woods	Lead	05/20/2020 09:50 AM	2020-12-31 00:0...	\$ 100,000.00
Car Wash Equip...	ABC Dealers	Jeff Bonell	Lead	01/19/2021 02:30 PM	2021-04-30 00:0...	\$ 100,000.00
ABC Hospital fur...	Q-Tran Quotes	Quote Record	Proposal Submitt...	07/01/2020 09:40 AM	2020-12-31 00:0...	\$ 50,000.00

Companies not contacted in 60 Days

Company N...	Type	Sage 100 C...	No Comm 6...	City	State	YTD Sales	PY Sales	Last Inv Date	Last Comm ...	A
ABC Ortho	Customer		True	Chicago	IL	\$ 0.00	\$ 0.00			S
ABC Smiles	Customer	0000038	True	Brookfield	WI	\$ 0.00	\$ 0.00			S
ABC Test Co 2	Customer	0000036	True	Brookfield	WI	\$ 0.00	\$ 0.00			S
ABCD Trucki...	Customer	0000005	True	Milwaukee	WI	\$ 0.00	\$ 0.00			S
BOB HARLAN	Customer	0000037	True	Brookfield	WI	\$ 0.00	\$ 0.00			S
Bonell, Inc.	Customer		True	Waukesha	WI	\$ 0.00	\$ 0.00			S

Custom ASP Report Capabilities

- Having the integration to Sage 100 gives us the ability to create custom ASP pages in SageCRM that include sales data
 - Customer Sales by Month Reports
 - Item Sales by Month Reports
 - My Open Orders and My Invoices reports for Salesreps
 - Search Inventory levels from SageCRM
 - Pull up customers by the items they purchased for up-sell and cross-sell marketing
 - Monthly Sales Rankings by SalesRep
 - Opportunity Conversion Stats

MyCRM > Customer Sales by Month Example

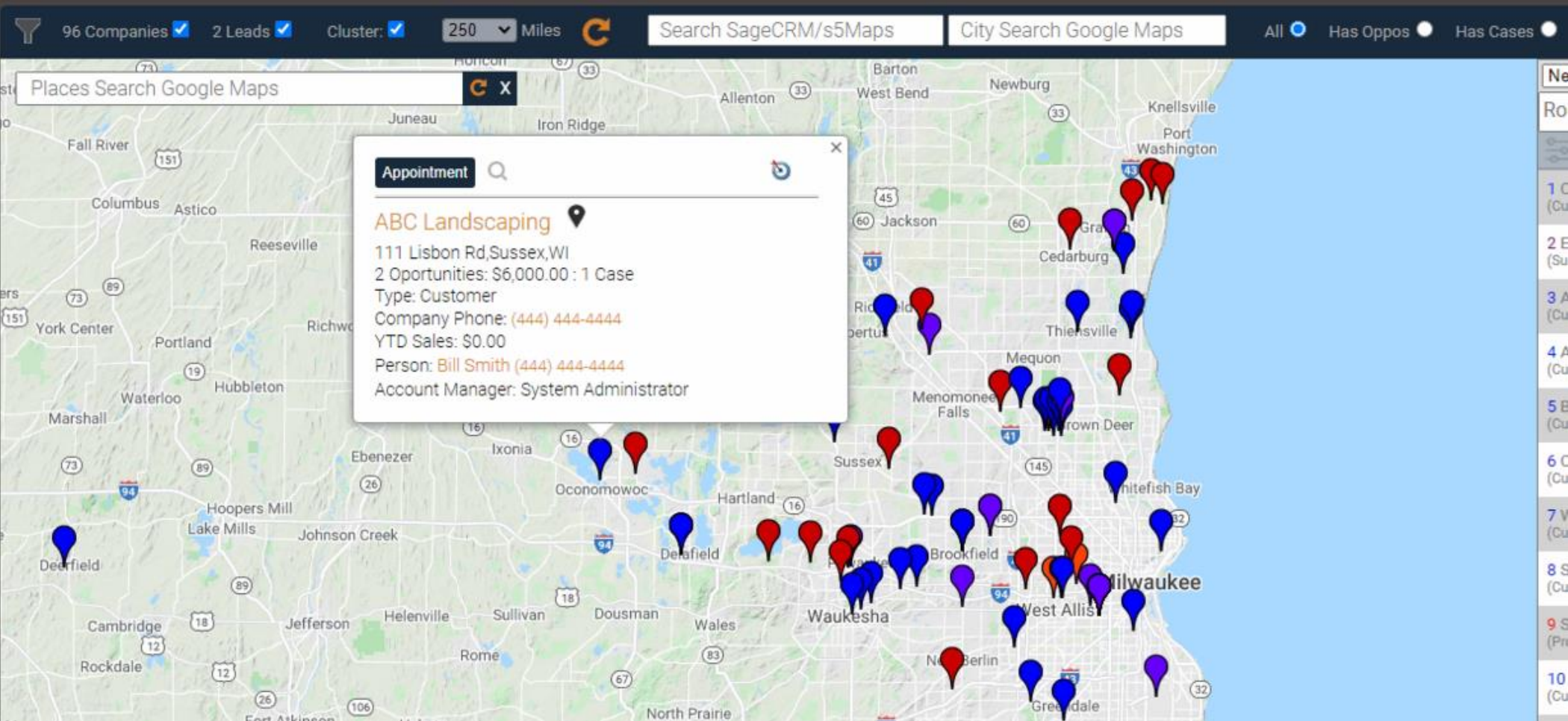
Enter 4-digit YEAR:

Customer Sales by Month 2022																			
Company	Acct Mgr	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2022 Sales	2022 YTD Sales	2021 YTD Sales	YTD Diff \$	YTD Diff %	
<input type="text" value="Search..."/>	<input type="text" value="Search..."/>	<input type="text" value="Search"/>	<input type="text" value="Search..."/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search..."/>	<input type="text" value="Search..."/>	<input type="text" value="Search..."/>	<input type="text" value="Search..."/>	<input type="text" value="Search"/>	
Maverick Papers	System Administrator	\$0	\$859	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$859	\$859	\$4,343	-\$3,483	-80.21%	
ABC Dealers	System Administrator	\$0	\$580	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$580	\$580	\$8,027	-\$7,446	-92.77%	
American Business Futures	Deb Taylor	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0%
InSinkErator	Deb Taylor	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0%
Shepard Motorworks	Deb Taylor	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0%
A To Z Carpet Supply	Ron Jackson	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0%
H&H Auto Parts	System Administrator	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0%
Custom Craft Products	System Administrator	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0%
Greater Alarm Company	System Administrator	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0%
Jellco Packing	System Administrator	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0%
Orange Door & Window Co.	System Administrator	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0%
Culver's Corporate	System Administrator	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0%
		\$0.00	\$1,439.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,439.00	\$1,439.00	\$12,370.00	-\$10,929.00		

MyCRM > Opportunity Stats

Opportunity/Quote Stats		MyCRM > Opportunity Stats										
Export to Excel		Start Date	1/1/2023	End Date	9/30/2023							
Username	Team	Created	Avg \$	In Progress	In Progress \$	In Progress %	Lost	Lost \$	Lost %	Won	Won \$	Won %
John Smith	Sales	47	\$ 3,700	27	\$ 99,900	57%	11	\$ 40,700	23%	9	\$ 33,300	19%
Sally Jones	Sales	35	\$ 4,200	15	\$ 63,000	43%	8	\$ 33,600	23%	12	\$ 50,400	34%
Amanda Clark	Sales	50	\$ 2,600	30	\$ 78,000	60%	14	\$ 36,400	28%	6	\$ 15,600	12%
Totals		132	\$ 10,500	72	\$ 240,900	55%	33	\$ 110,700	25%	27	\$ 99,300	20%

S5 Maps - GoogleMaps Integration with CRM



Pull up a company in SageCRM and click on a MAP TOOL to display all of the CRM companies in the area on a Google Map

GoogleMaps Integration with CRM – Routing Addon

Route: TestDGHoustonJan2017 : - Clone Delete

Add Day to Route: 2018-01-08 8:00 am Create Appointments

Total Distance: 26 miles.
Total Drive Time: 1 hour, 10 minutes!

1) Mon Jan 08, 2018 @ 8:00

Stop	Location	Lock	Start Time	Duration	Status
Stop 1	Houston Airport	<input type="checkbox"/>	8:00 AM	1:00	On Time!
Stop 2	Source/Guardian	<input type="checkbox"/>	8:15 AM	0:30	On Time!
Stop 3	Supply	<input type="checkbox"/>	10:00 AM	0:30	On Time!
Stop 4	Products	<input type="checkbox"/>	10:45 AM	1:00	On Time!
Stop 5	Co	<input checked="" type="checkbox"/>	1:30 PM	1:00	On Time!
Stop 6	Tools	<input type="checkbox"/>	2:45 PM	1:00	On Time!
Stop 7	Lumber Supply	<input type="checkbox"/>	4:00 PM	1:00	On Time!
Stop 8	Hotel Super 8	<input type="checkbox"/>	5:15 PM	1:00	On Time!

We can also implement a Routing feature into your Google Maps solution. This lets your salespeople create and save appointments to a route from the Google Map so they can plan out trips.

It will also let them save the route appointments to their CRM calendar.

Conclusion/Recap

- A successful CRM implementation can transform the productivity of your business
- The integration of SageCRM with Sage 100 brings you additional productivity options
 - Streamlined quoting and opportunity management
 - Key Sage 100 sales data right in SageCRM
 - Unlimited reporting capabilities come with having Sales Order and Invoice Data stored in SageCRM
- SageCRM product/platform that can grow with your business.

Effective Solutions

We are a team of consultants that specialize in helping companies implement SageCRM solutions. We have over 10 years of experience implementing integrated SageCRM and Sage 100 solutions.

The solutions we create become critical to the success of our customers.

Thank You for your time.



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