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

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

Email and Letter Templates

- **Build standard email and letter templates to make your SageCRM users more efficient**

- **Great for prospecting and repetitive communications**

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

Advanced Sage100 Integration - Transactions

Review Quote, Order and Invoice Transactions from within SageCRM

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

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

Generate Sage 100 quotes from SageCRM

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

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

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

Subject: Effective Solutions Quote: 0000424

☐ **Do not file this communication**

Attachments: EffectiveSolutionsPartsAndService-Quote 0000424.pdf 🗑

Send E-mail

Cancel

Help

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

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
Company:	Maverick Papers
Person:	Annette O'Toole-Smith

Phone: 312 861-1200 Mobile
E-mail: don@effsolutions.com
ClickAddress:

For

Company:
Maverick Papers ☎ 312 861-1200

Person:
Annette O'Toole-Smith ☎ 312 861-1200
Mobile

Change

Continue

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

Summary Report

Add to Group

Help

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: Investi

▸ Waiting

▸ Queue

▸ Solved

Manage your Open Cases (TeamCRM)

Team CRM for: All Teams

29 Cases

| 25 Logged | 3 Queued | 1 Investigating | 0 Waiting | 0 Solved | 0 Confirmed |

29 Cases, Page 1 of 2

Go to page 1

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:
In Progress

Stage:
--All--

Priority:
--All--

Territory:
--All--

Filter

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
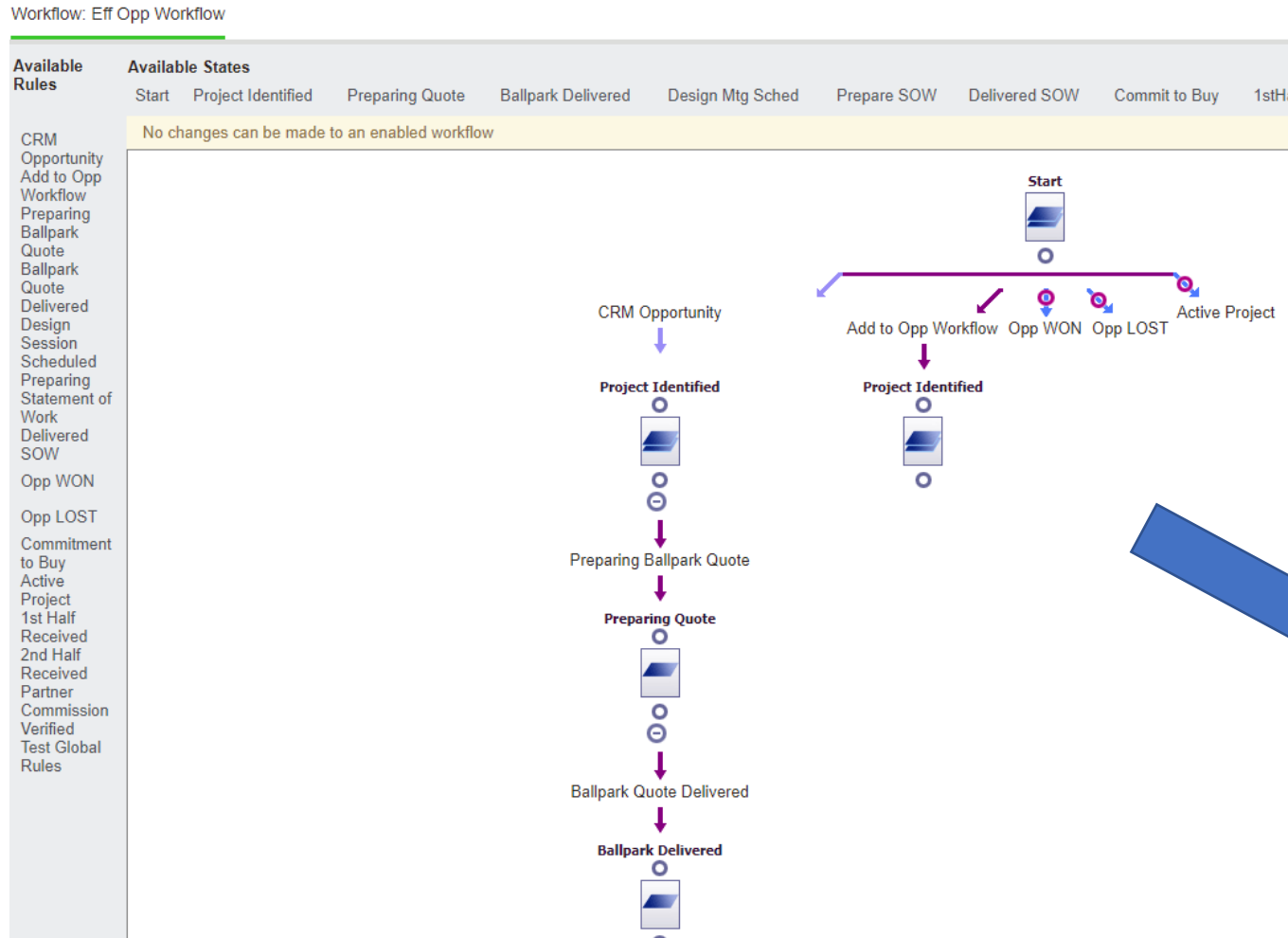
Each workflow rule can:

- Update Fields

- Prompt to update fields

- Send email notifications

- Create Tasks

- Run scripts, and so much more
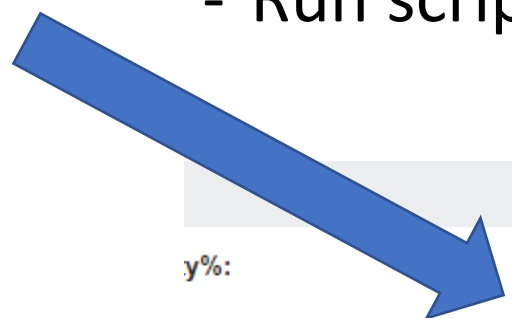
Measure and Report on CRM Activities

- **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							
Mona Janes		1	10							
Laurie Dely	1	3								
Wendy Skemer		12	14							
Stacey Kuzniasz										
Britt Blakeley			6	1						
Jon-Michael Whiteman			1							
Michele Jacoby			1							

Leads Generated by Source
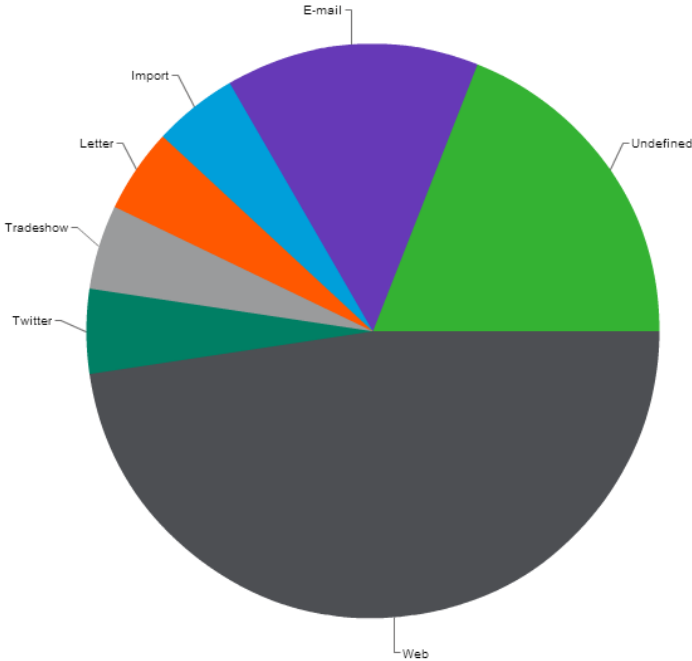
Robust Dashboards and Reports

- **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

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

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 %
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%
InSinkErator	Deb Taylor	$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%
A To Z Carpet Supply	Ron Jackson	$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%
Custom Craft Products	System Administrator	$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%
Jellco Packing	System Administrator	$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%
Culver's Corporate	System Administrator	$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 > Items Sales by Month Example

Item Sales by Month 2022

Item Code	Item Description	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2022 Sales	2022 YTD Sales	2021 YTD Sales	YTD Diff $	YTD Diff %
Search...	Search...	Search	Search...	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search...	Search...	Search...	Search...	Search.
1001-HON-H252LK	HON 2 DRAWER LETTER FLE W/ LCK	$0	$435	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$435	$435	$1,231	-$796	-64.66%
1001-HON-H254	HON 4 DRAWER LETTER FLE W/O LK	$0	$393	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$393	$393	$762	-$369	-48.45%
1001-HON-H254LK	HON 4 DRAWER LETTER FLE W/ LCK	$0	$270	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$270	$270	$1,910	-$1,640	-85.87%
2481-5-50	DESK FILE 5 1/4" CAP 50	$0	$230	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$230	$230	$847	-$617	-72.81%
2551-3-50	DESK FILE 3 1/2" CAP 50	$0	$91	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$91	$91	$0	$91	100%
2568-3-25	DESK FILE 3 1/2" CAP 25	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$843	-$843	-100.00%
4886-18-14-3	PAPER CADDY 18"W 14"D 3"H	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$1,822	-$1,822	-100.00%
6650-26-16-11	SOUND CVR 26"W 16"D 11"H DM	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$2,331	-$2,331	-100.00%
6657-24-20-12	SOUND CVR 24.5"W 20"D 12"H LQ	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	0%
8971	UNIVERSAL 5 1/4" SSDD FLEX DSK	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	0%
8972	UNIVERSAL 5 1/4" DSDD FLEX DSK	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	0%

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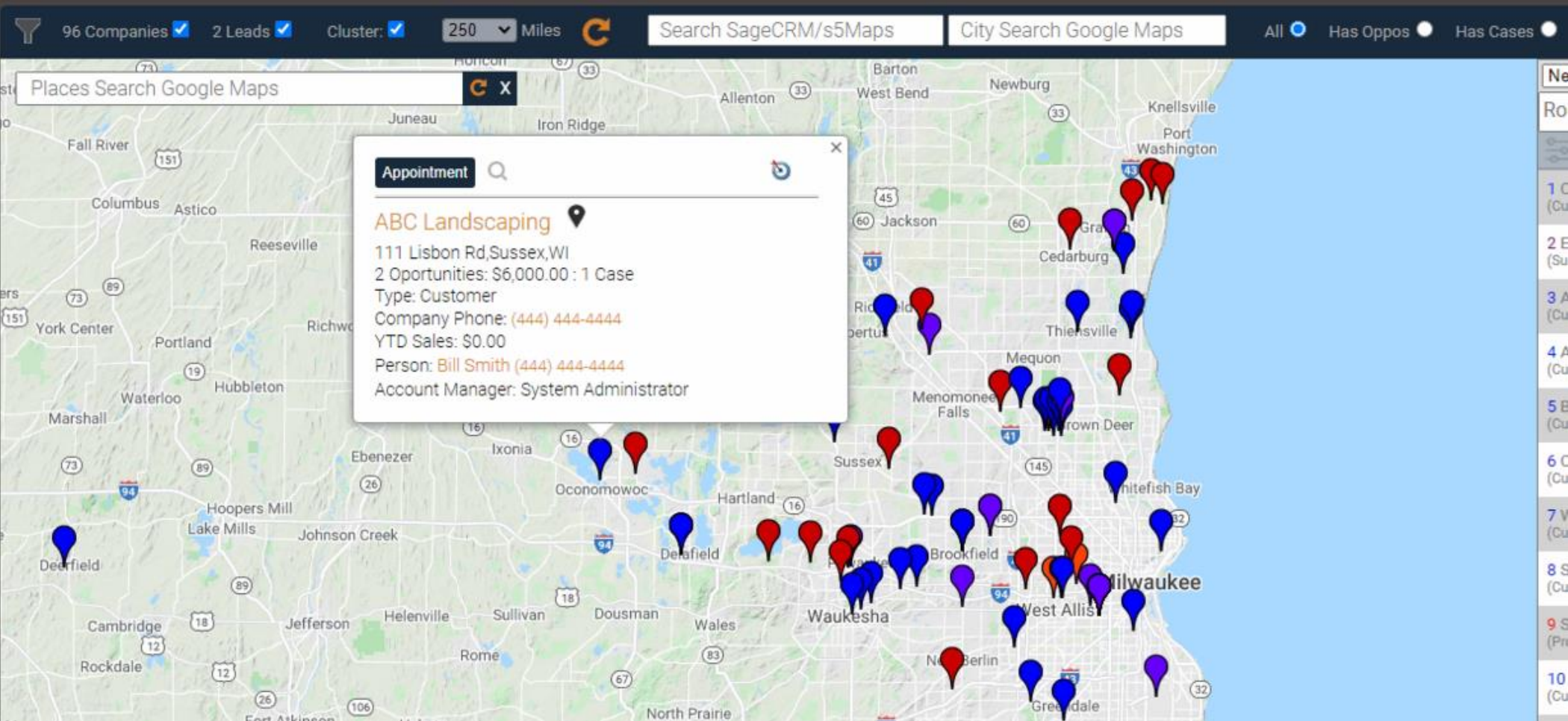
Pull up a company in SageCRM and click on a MAP TOOL to display all of the CRM companies in the area on a Google Map

GoogleMaps Integration with CRM – Routing Addon

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.

Don Grubor

President

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