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For Your Information

CMP Media LLC's *Network Computing* magazine has awarded SageCRM.com its 2006 Well-Connected Award for On-Demand CRM Service in the Enterprise Applications category. The Well-Connected Award honors outstanding technology products featured in head-to-head product evaluations conducted by the publication during the past year, and builds upon SageCRM.com being named its Editor's Choice in a hosted-CRM solution comparison.



**Have You Outgrown Contact Management?
 Sage CRM—The Next Logical Step**

If you're using contact management software, but find that it isn't fully addressing the needs of your growing business, we'd like to introduce you to Sage CRM. Sage CRM is an award-winning Customer Relationship Management solution from Sage Software. Its capabilities provide you with the added functionality you need to acquire, maintain, and support profitable customer relationships. Here's a quick list of some of the significant benefits Sage CRM delivers.



Empower your team with the tools they need to provide quality customer service.

Internet Architecture

Sage CRM is powered purely by Internet architecture that has many advantages over typical client/server technology. System administration is simplified. You can access Sage CRM via an Internet browser, whether you are a local or remote user. Secure access using PDAs and WAP-enabled devices is also supported.

If you prefer a hosted CRM solution, SageCRM.com offers virtually the same functionality as Sage CRM, with the benefits of rapid deployment, fixed monthly costs, and a minimal demand on your IT resource.

Marketing Tools

Sage CRM provides robust marketing automation tools that allow you to target customers and

prospects, automate campaign activity scheduling and follow-up activities, and track response rates. You can set up workflow processes to ensure each lead is worked.

Sales Engine

With Sage CRM you can effectively manage all aspects of your organization's sales cycle, from opportunity to close. Automate activities such as calls, letters, and literature fulfillment based on processes you define.

Customization

Sage CRM provides extensive customiza-

tion capabilities. You can expand and customize screens, and add new data elements to mold the software to address your specific business needs.

Integration

Sage CRM supports integration to the products your organization uses every day, providing management with a comprehensive view of operations and staff with an efficient workflow.

Service And Support

With Sage CRM, you can track and resolve customer questions, issues, and technical support inquiries for a high-quality customer experience.

We'd be pleased to help you determine if Sage CRM might be the next logical step for your organization — please give us a call. ★



305 N. Heaton St
 Knox, IN 46534
 (574) 772-6100
 (574) 772-6500 fax
 (866) 745-0386 toll free
 info@dquest.com
 www.dquest.com

Sage CRM Customer Care

Sage CRM allows you to provide quality customer service and maintain customer relationships. By managing and tracking your open cases, and maintaining a library of solutions to common problems, Sage CRM Customer Care is an ideal tool to help you maintain or increase customer satisfaction. Let's learn more.

Overview Of Customer Care

Sage CRM Customer Care is based on cases. A Case is typically a customer incident or a request by a customer for technical assistance. You can add new cases, track them as they move toward resolution, receive notification when a case appears stalled in the process, and mark it as resolved.

You can customize the workflow to match your organization's processes. Powerful reports and inquiries ensure you always have up to date details of the open cases. The KnowledgeBase Solutions feature allows you to maintain a library of resolutions and support articles for reference.

Workflow

Establishing a workflow that your cases typically follow enhances your company's level of customer service by ensuring adherence to the steps you have defined.

You define the workflow that works best for your organization, but typical statuses or steps in case resolution workflow might be: Logged, Investigating, Waiting, and Resolved. A case moves from one step to the next as your service representatives indicate completion of a step. If the case remains inactive longer than the predefined period of time, Sage CRM will escalate the case, sending an e-mail notification to the support manager or other individuals alerting them to the condition.

Service Level Agreements

Service Level Agreements, or SLAs, allow you to set up and maintain various service levels. These agreements between you and your customer spell out the timeframe in which a case must be resolved. Depending on your business needs, you may define multiple service levels, each with its own resolution time frame.

When setting up an SLA, you'll have access to a business calendar unique to your organi-

zation that defines work hours, work days, and accounts for holidays. The time frames you define here are then used as part of the Sage CRM Workflow to escalate a case when it lingers too long in a particular status.

View Open Cases

It's easy to view all open cases from the My CRM tab. The cases pipeline and all open cases are displayed for you. The pipeline is a graphical representation of your cases, color coded by the current status. The total number of cases in each status is displayed, along with the total number of open cases. The on-screen listing of each open case shows pertinent information such as the severity, responsible person, product, description, stage, and SLA Status.

You can sort the listing by any column displayed by simply clicking on the column header. The SLA Status is color coded as green, yellow, or red to indicate whether the case is on target, approaching deadline, or overdue, respectively.

Creating New Cases

Creating a new Case is simple. Just click on the New Case action button, find the appropriate person or company, and enter the details of the case.

This screen can be modified to suit your business needs, gathering the data you need to quickly resolve your customer issues. At minimum, you will record the SLA, severity of the problem, and notes detailing the problem.

As you save the case, Sage CRM assigns a Case ID. Depending on the workflow you have defined, workflow action buttons will appear allowing you to advance the case to the first status, reassign it to another consultant, and enter additional tracking notes.

As you work your way through the steps to case resolution, the Tracking tab is a helpful tool that displays your open cases, the stage each is in, and the duration. You can change the case's status from here and record tracking notes to follow the case to the next step.

KnowledgeBase Solutions

The KnowledgeBase holds a library of resolutions to common problems as well as general articles of interest to support personnel. Once a case is resolved, you can link the solution or

KnowledgeBase article to the case.

New findings can be documented and saved as a new solution, adding to the library. Once approved, they are available to all users of the system. If appropriate, you can link multiple solutions to a single case.

Customer Communication

It's important to communicate with your customers as you work toward a resolution of their case. Using the same tools available to your sales and marketing departments, your support team can communicate with customers and ensure that a record of those communications is stored within Sage CRM. You can schedule calls, record notes of conversations, and send e-mail updates—Sage CRM will record those communications and make them available to all users.

Reporting

Sage CRM delivers comprehensive reporting tools that show you how well you're taking care of your customers. Several predefined reports are available, or you can create new ones following an easy step-by-step tutorial. Each report can be printed to a PDF file, viewed as an on-screen report, or exported to a CSV (comma separated value) file.

The Cases Tracking report provides a breakdown by support representative with the total number of cases and their duration. The Cases Open By Company report lists all the open cases for the company, and includes a graphical depiction of the open cases by customer. All reports include hyperlinks where appropriate, allowing you to drill down to uncover further details about a case.

Call us for more information on managing your customer support with Sage CRM. ☆

Today's Tip

Did you know that to quickly set the date in any date field in Sage CRM to "TODAY" you can simply type <CONTROL + T>?