info Newsletter
For SageCRM

Volume 4
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## What's Inside



## Headline News

For the fifth consecutive year, SageCRM/SageCRM.com has been selected by ISM Inc., Customer Relationship Management (CRM) and eCustomer strategic advisors, as a Top 15 CRM Small & Medium Business Software Award winner for 2007. ISM awards have been considered the industry benchmark since their inception in 1990.

# Front Office/Back Office Systems Integration

How many software applications store customer information in your organization? If your company is like most, different types of customer information are kept in two or more applications. No doubt your chief financial officer wanted the best possible accounting application with excellent audit trails, built-in controls, and flexible reporting options. He or she likely did not check with the sales department when selecting this application. Your sales executives, seeking greater visibility into sales pipelines and ways to make the sales team more effective, went looking for the ideal customer relationship management (CRM) and sales force automation tool to implement. Again, they probably didn't check in with finance when making their selection.

Each department now has the best-of-breed solution for their needs and can live happily ever after, right? The problem is that both systems contain customer information that the other system needs, resulting in duplicate data entry and inefficient workflow for both your front and back-office staff.

Connecting your front and back-office data can contribute to a harmonious workplace.

## Reasons To Integrate Your Systems

There are many reasons to integrate your front and back-office systems. Here we look a just a few.

### Impact On Staff Productivity

When information exists in systems that don't communicate with each other, it is likely that your staff is operating without the information they need to be most effective in their jobs. Sales representatives may work on new opportunities without realizing the customer has exceeded their credit limit or has an invoice seriously past due. When the sales team closes a deal, the order must be rekeyed into the back-office system by the accounting staff, incurring both the unnecessary overhead of duplicate data entry and the possibility of errors.

### Internal Conflict

The lack of a centralized view of all customer information in an organization is often a source of conflict between staff members. Back-office staff may have concerns about access to confidential accounting information, and may believe that customer-facing staff ignore internal procedures. Conversely, front-office staff may see back-office

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**Sage Accpac Integration**
See page 4 for more info!

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staff as creating unnecessary bottlenecks in the sales process. It is important to recognize these common attitudes and address them directly when you integrate front and back-office systems.

### Impact On Customer Satisfaction

Imagine the annoyance of a customer who places an order with his sales representative, only to find out a week later that the order is on hold in the accounting department awaiting additional information. When the order is finally released, an entry error results in the wrong product being sent. This is a serious problem in the current highly-competitive business environment, in which customer satisfaction is critical.

### Benefits Of Integration

By integrating the front and back-office systems, you can provide a complete view of customer information to everyone in the organization. Not only will team members have the information they need to be productive in their roles, relationships between departments inevitably improve because everyone is operating with the same information pertaining to customers and orders. When executed properly, integration can result in increased productivity and company-wide efficiency. Customer satisfaction improves because customers get faster and more efficient service. Ultimately, the organization realizes greater profitability as internal productivity soars and satisfied customers return again and again.

## Systems Integration Basics

The precise needs of individual organizations will vary according to industry-specific requirements, but a base level of functionality is useful to virtually every organization.

### Front Office Information Needs

Your sales and customer-facing teams are most effective when they can handle all a customer's needs right away, without having to check with accounting and call back later. When a sales representative calls to close a sale, the chances of closing are greatly improved if the customer's other questions regarding the status of an earlier order, available credit, or past due amounts can be answered up front.

In order to provide customers with accurate product pricing and availability, your sales team also needs access to invoice history, open invoices and payments, open orders, return orders, item prices, contract prices, price codes, and quantities available by warehouse.

With most accounting information, the customer-facing teams only need inquiry access, without the need to change information. However, updates to billing and shipping addresses and contact information are likely to arrive in the customer service department first, and it may make sense to automate the transfer of this type of information to the back office.

### Back Office Information Needs

If orders generated by the sales team are then keyed into the accounting system by back-office personnel, an opportunity for error is introduced into the process.

For increased efficiency, orders generated by the front office need to flow automatically into the open order file in the back office. Not only is the potential for error reduced, you will realize greater productivity as duplicate data entry is eliminated. Automatic updates to customer information such as new contacts, new addresses, and telephone numbers will save the accounting department time as well.

### Create The Win/Win

With a well-integrated system, everybody wins. Customer-facing staff win by having all the data to answer customer questions at their fingertips. They can quickly get past the current order or invoice status questions and move on to closing the next sale. Accounting staff win with the elimination of duplicate work re-keying orders and reduction of the time spent answering questions from the sales team. Customers win by receiving faster and more accurate service. The organization wins by the resulting increased profitability.

### Making It Happen

Sage Software understands the benefits to be gained through front-office to back-office integration and has designed SageCRM to integrate readily with back-office systems. On page 4 of this newsletter, we highlight the new integration between SageCRM and Sage MAS 90 ERP, and we also cover the enhancements to the integration with Sage Accpac ERP scheduled to be available this summer.

If you already own one of these ERP solutions, you have the ability to quickly implement a very powerful integration. If you are in the process of selecting a new accounting or ERP system, the available integration options can be a powerful factor in the decision-making process.

Give us a call to discuss your front-office to back-office integration needs. ☆

## Tips & Tricks

Here are the steps for creating a New Mail Merge Template in SageCRM:

1. Determine the entity to be associated with the template. This will determine which fields will be available for the template. Entities that can be used for mail merges are: Company, Person, Lead, Opportunity, Case, Quote, and Order.
2. Open a record of the chosen entity. For example, if using the Case entity, find a case record and open it.
3. Right-click or hover over the New icon and select Document. Doing so will display the *Choose Letter Options* screen.
4. Select the *Create New Local Template* option. Click *Continue.* The *MergeBlankDoc.doc* file will open in Microsoft Word.
   If this document does not open, search for the MergeBlankDoc.doc file. This file can be found in the __\DocTemplates\Letters-A4\US directory (version 5.7) or __\Library\Global Templates\US (version 5.8).
5. To add the merge fields to the document, click the *Insert Merge Fields* icon.
6. Click *Insert* to add merge fields to the document. ☆

# Make Certain Your CRM System Is Used

Customer relationship management (CRM) software contains powerful tools to manage all of your customer-facing activities, with enormous potential to increase customer satisfaction, accelerate sales cycles, and make sales teams tremendously effective.

However, for a CRM solution to be effective it must be used. Because salespeople are usually highly people oriented, they are generally much more comfortable picking up the phone to get answers to questions than looking it up in the software. What will win them over? If the CRM system truly makes an individual's job easier and rewards them with increased sales, it will be enthusiastically adopted.

Whether you are planning to purchase CRM, or are in the implementation phase with your solution, or even already using one, it is important to understand how salespeople currently work and determine how the CRM software is going to both mesh with and enhance current methodologies. Let's take a look at some specific areas on which to focus.

### Sales Productivity

An intuitive interface for the salesperson is perhaps the most underestimated aspect of a technology decision. A salesperson should be able to quickly begin using the sales tools with very little training. They should be able to relate the new software to current tasks and see how it reduces their administrative work.

Often the most comfortable interface comes from using the tools already in use. E-mail, word processing, and contact management are already being used to keep busy salespeople in touch with their customers. A CRM solution that expands on the power of these familiar tools is more likely to be adopted by your sales team. For example, most businesses rely on Microsoft Outlook. Make sure you implement your CRM system to make the interface with Outlook as seamless as possible.

### Access To Information

Customer satisfaction relies on good communication. When speaking with a customer, it is critical your sales team have access to accurate and up-to-date customer and product information—customer history and notes, product inventory in the regional warehouse, product pricing, invoice and order history, and credit status of the customer, among others. Access to this information must be transparent to the salesperson and accessible faster than a phone call to their inside sales representative or sales support team. This seamless integration is essential to salesperson effectiveness because the less time a salesperson has to wait for answers, the more time they have to sell.

If instead of searching through sent e-mail to recycle a three-month-old word processed proposal, a salesperson can instead access a proposal template, generate a proposal tailored for this customer, and send it in an email in a few clicks, they will willingly adopt the CRM system.

### Fit CRM To The User

Since software is easier to change than your business, your CRM system must adapt to the needs of your company and your salespeople. It should enforce and reinforce your particular business procedures. It must relate the information to the salesperson in the terminology they expect. Workflow should be customized to match existing processes.

Flexibility is crucial to winning over users. A salesperson should be able to create their own lists or groups of customers and prospects, they should be able to personalize their sales letters for customers, and even choose to skip a step or two in their sales process to meet real-world needs. They will reject a rigid CRM system that enforces its own idea of efficiency and strict process.

### Remote Connectivity

For many salespeople, a smart phone or BlackBerry is their lifeline to their sales prospects. Without an interface to your CRM system, customer communication that occurs on these devices is lost. An effective CRM application must provide all the same features and functions in both a connected or mobile environment with smart phones, PDAs, BlackBerrys, tablet PCs, and laptops. While on a plane, at the customer site, or even at the hotel in the evening, mobile salespeople are frequently disconnected from the office and the Web. During these times they often need access to customer information to be productive. There's no need to call the customer back when they have real-time access to critical sales information on their handheld device.

### Tools To Drive Adoption

Beginning with Version 6, SageCRM contains built-in training and coaching tools to help make sure sales teams know how to effectively use the software. These tools are designed to assist both new and existing users, ensuring that SageCRM is embraced and used across the organization.

By building these tools right into the software, SageCRM puts them at the fingertips of your staff as they are using the system. Easy learning is available in several different formats: coaching captions, videos, wizards, quick tips, and quick links.

Coaching Captions educate the user about the data they are viewing and ensure that users never get lost in the system. Administrators can customize and edit the content to match the terminology and business processes of their organization.

A suite of self-paced training videos are excellent for visual learners and cover the basic knowledge and skills required for navigating and working with SageCRM. The videos are easy to follow and are available to the user on an as-needed basis.

A Preferences Wizard provides users with the ability to set their own preferences easily, enhancing usability. Quick Tips provide answers to commonly asked how-to questions, and Quick Links provide instant access to SageCRM documentation for in-depth study.

With proper implementation and training, your CRM solution can be a powerful tool to increase profitability and customer satisfaction in your organization.

Give us a call, we'd be pleased to help you evaluate your CRM needs.

# In The Spotlight: SageCRM Integration

A powerful new integration link has just been released connecting Sage MAS 90 ERP and SageCRM, and a significant set of enhancements are coming this summer for the existing integration with Sage Accpac ERP. We've highlighted the capabilities of these integrations below.

## New SageCRM—Sage MAS 90 Integration

The new of release SageCRM integrates seamlessly with Sage MAS 90 and the data of the two systems is synchronized automatically.

### Generate Accurate Quotes

From within SageCRM, staff can launch the Sage MAS 90 Sales Order Entry task and create quotes and orders as if they were working directly in Sage MAS 90. Orders and quotes will use the customer-specific pricing you've established in Sage MAS 90. Inventory availability is displayed and updated just as it would be if the order were created directly in Sage MAS 90.

### Keep Information Current

As your sales staff speaks with a customer, they can record an address change, add a new contact, update an e-mail address—and Sage MAS 90 and SageCRM are automatically synchronized with the updated information.

### Insightful Queries

From within SageCRM, you can access the powerful Sage MAS 90 Business Insights Explorer (BIE) tool to query and drill down into Sage MAS 90 data. BIE views include Customer Inquiry, History and Open Invoice Views, Payments, Shipping History, and Open RMAs.

### Security Honored

To protect sensitive accounting data, the business rules and security established in Sage MAS 90 are honored within SageCRM. When creating an order, users will be notified that a customer is on credit hold or has exceeded their credit limit. With integrated SageCRM and Sage MAS 90, your sales staff can answer virtually any customer question without troubling your accounting staff.

## Sage Accpac Integration Enhancements

If you already integrate Sage Accpac with SageCRM, you are enjoying the benefits of a centralized view of customer and supplier information. With the release of Sage Accpac version 5.4 service pack 2, the integration is significantly enhanced.

### New And Enhanced Customer Views

From within the SageCRM Customer entity, you can now access Project Management information. View contracts, projects, and transactions and drill down to summary details. Access is provided to the Sage Accpac Contract Maintenance screen to add and edit contracts.

In coordination with the release of the new Sage Accpac RMA module, a new Return Authorization inquiry provides access to RMA documents. You can view Return Authorizations and the Credit Notes, replacement orders and vendor returns associated with it. From the inquiry you also can open the Sage Accpac Return Authorization entry screen to directly add or edit return authorizations.

### New Vendor Views

A new Purchase Order Inquiry tab has been added to Vendors; you can view open purchase orders and drill down to the details of the items on the purchase order, as well as inquire into PO Returns, Credit Notes, and Item Purchase History. Access is provided to the Sage Accpac Purchase Order entry screen, allowing the user to directly add or edit Purchase Orders. An RMA view provides access to the return authorizations assigned to the vendor and provides a drilldown to the details. A new Project Management view provides access to Project Management-related transactions for the vendor.

By choosing a Sage Software accounting and ERP product to integrate with your SageCRM solution, you can gain the benefit of working with a single vendor focused on front-office to back-office integration. Give us a call with your questions. ☆

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