SAGE ACCPAC CRM

software

sage
software

Sage Accpac CRM is an award-winning wireless and Internet-based CRM system that provides enterprise-wide access to vital customer, partner, and prospect information – anytime, anywhere.

Built to Perform

Sage Accpac CRM uses industry-leading technology to foster better business practices and effortless information exchange throughout your enterprise. With Sage Accpac CRM, you can quickly analyze, manage, and synchronize sales, marketing, and customer care activities across all points of contact. Regardless of how, when, or where your customers, partners, and prospects choose to interact with your company, Sage Accpac CRM gives you a decisive advantage by providing comprehensive, easy-to-use tools to successfully manage these relationships.

Unlike competitive CRM solutions, we've taken a no-compromise approach to ensure that Sage Accpac CRM is a true Web and wireless-based application. As a result, all you need is a single installation at a central location to support your entire organization. Everyone gets real-time access to the critical information they need via a personal computer, PDA, Tablet PC or, smart phone – immediately increasing productivity and reducing administrative costs.

Sage Accpac CRM offers a full range of hosted or on-premise deployment options, which means you get complete flexibility to run your business your way. As your business needs change, you can quickly and easily switch deployment environments (from hosted to on-premises deployment, or vice versa) and all your CRM customizations and data move with you. Sage Accpac CRM also gives you the ability to extend functionality and integrate with other systems using open Internet standards and traditional integration technologies.

Take a closer look at Sage Accpac CRM and you'll find a comprehensive, easy-to-use application that is great to work with, makes perfect technical and business sense, and provides cost-effective results for your company – today and tomorrow.

Freedom to Choose

Sage Accpac CRM provides your company with an award-winning product that fits your needs today and in the future. It comes in multiple editions and is rapidly deployable at your place of business or as a hosted service at sagecrm.com. As your company grows, Sage Accpac CRM can grow right along with it, providing scalable upgrades designed to keep pace with your expanding business.

Sage Accpac CRM is available in two editions (Sage Accpac CRM 100 and 200) for in-house deployment – providing affordable, value-based pricing no matter the size of your organization. It comes ready to install and use right out of the box, is rapidly deployable, and easily integrates with your back-office accounting application – saving you time and implementation costs.

Companies who want to get up and running without having to establish or maintain their own infrastructure can take advantage of the benefits of a fully hosted CRM service at sagecrm.com. When you choose sagecrm.com, you get secure, dependable access to the latest technology – for a fraction of what it would cost to purchase hardware and software and implement and maintain a network infrastructure.
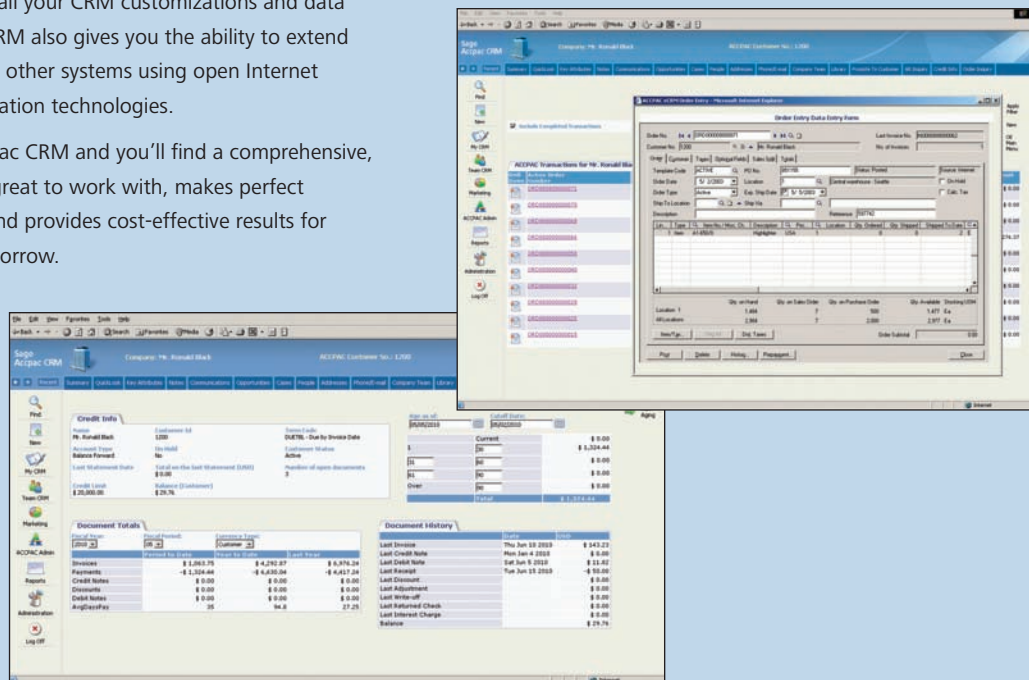
With real-time, bi-directional information flow, Sage Accpac CRM offers instant integration between your front-office and back-office systems, saving you valuable time.

Enterprise-Wide CRM

Sage Accpac CRM offers the advanced functionality needed for effective sales force automation, marketing, customer care, and call center support across industries, all accessible through a Web browser or wireless handheld device. With Sage Accpac CRM, key personnel have easy access to common, client-focused information, enabling them to provide better, more personalized service to help foster customer loyalty.

Sales Force Automation

From first contact to order fulfillment and delivery, Sage Accpac CRM Sales Force Automation maintains a single source of information that is shared across the enterprise. Fully customizable with workflow, opportunity management, sales cycle analysis, forecasting, and easy-to-use reporting features, Sage Accpac CRM makes it easy to understand and respond to prospects and customers – all the time.

Marketing Automation

Sage Accpac CRM marketing automation helps you maximize revenue opportunities and return on investment (ROI) by enabling you to respond quickly to your customers through cost-effective, highly personalized, and targeted marketing programs. It's easy to develop, target, implement, manage, and analyze campaigns. Sage Accpac CRM automates the process, from concept to lead distribution and every step in between, cutting costs and improving the effectiveness of your marketing initiatives.

Customer Care Automation

Sage Accpac CRM customer care provides complete workflow, incident tracking, case management, and service status to help you create a reliable knowledge base for consistent, efficient customer service. Your knowledge base is built through traditional channels, such as phone and e-mail, or via Web self-service, which allows customers to enter, resolve, and track their own service requests. You can also access complete case histories at the touch of a button, resolve queries and support issues faster, and ultimately serve your customers better.

Hosted CRM at sagecrm.com

Sagecrm.com is the only hosted CRM application with the combined advantages of seamless migration to an on-site CRM system plus out-of-the-box accounting integration.

Seamless Platform Flexibility

As your business expands and process integration becomes critical, you can simply migrate your ACCPACcrm.com system to an in-house CRM system without extensive customization or the high cost typically associated with transferring data from an online to on-site system.

Out-of-the-box Accounting Integration

Sagecrm.com integrates off-the-shelf with your hosted back-office ACCPAC accounting system. You can view and share accurate, real-time data, increase collaboration, and boost productivity.

Easy and Affordable Hosting

Sagecrm.com is a hosted solution that significantly reduces your cost of ownership. One low price gets you everything you need – your CRM application, support, training, backups, updates, and more – without large upfront software and hardware investments or a dedicated system administrator.

Fast Deployment

Sagecrm.com can be rapidly deployed – as quickly as the same day you sign up for service. The result is a fast return on investment, a minimal impact on business operations, zero slowdown in IT department productivity, and immediate use of capabilities.

Secure Data Protection

Sagecrm.com provides multiple security layers to protect your data from possible sources of loss. Together, these security levels maximize the safeguarding of your valuable data. To protect customers' data and to authenticate the validity of user logons, we use the same 128-bit SSL encryption technology that is used to protect sensitive financial data in an online environment.
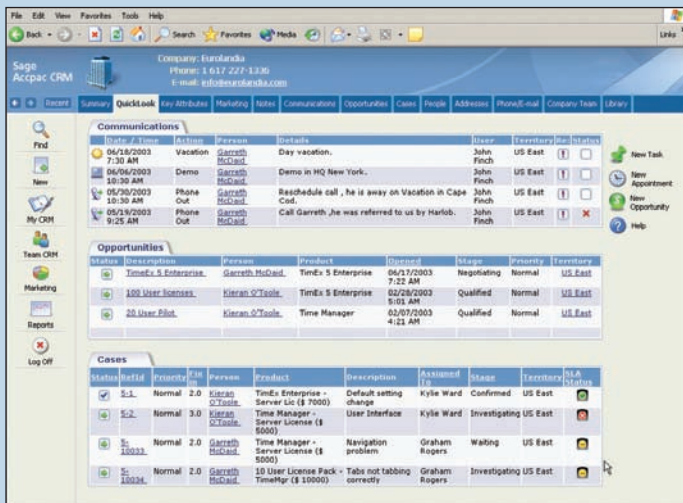
Sage Accpac CRM QuickLook gives you an instant view of customer communications, sales opportunities and cases, for quick access to the information you need most.

Experience the power of sagecrm.com

Sign up today for a 30-day FREE trial at

www.sagecrm.com

Flexible, Adaptable CRM

Sage Accpac CRM has a proven, built-in ability to adapt to a wide range of business applications including financials, human resources, Enterprise Resource Planning (ERP), supply chain management, and document management, among others. Furthermore, Sage Accpac CRM offers seamless, out-of-the-box integration with industry-leading ACCPAC business management applications – and also integrates with applications from other manufacturers.

Thin-Client Architecture

Sage Accpac CRM is Web-based and built on true thin-client technology, providing rapid deployment, efficiency, speed, and cost-effectiveness. Sage Accpac CRM offers pure "server-side" deployment, eliminating the need for difficult-to-manage and costly client installations, configurations, upgrades, and customizations. Sage Accpac CRM Web pages and graphics files are considerably more compact than standard Web pages, allowing faster downloads (even over slow connections). With Sage Accpac CRM, a Web browser and Internet access are all that you need to access your entire CRM system.

Automated Workflow

With Sage Accpac CRM automated workflow, you can integrate business rules across all channels, departments, and employees. To help assess and design workflow, Sage Accpac CRM provides graphical views of the process and its development patterns. In combination with e-mail integration, Sage Accpac CRM ensures that actions requiring attention or escalation are automatically routed to the appropriate employees or partners.

Industry-Standard Integration

Offering a strong Web services interface and support for XML, SOAP, and other integration technologies, Sage Accpac CRM is open for easy integration into other applications you count on to run your business. This level of systems integration allows Sage Accpac CRM to become more than just about customers, sales, marketing and support – it becomes a uniform platform upon which to process and deliver true company-wide intelligence.

Instant Integration

Sage Accpac CRM is built to integrate with the technologies that you choose to run your business, without dictating your technology choices. It provides out-of-the-box, instant bi-directional integration with ACCPAC accounting solutions like nothing else available today, so that CRM users always have real-time access to the most up-to-date information. And, if you're using other accounting or legacy systems, Sage Accpac CRM has the built-in ability to integrate with virtually any database or system.

True Customizability

Sage Accpac CRM provides customization tools that allow businesses to rapidly modify all aspects of the system. Its open architecture greatly reduces development and maintenance costs and allows seamless integration with other mission-critical applications across your enterprise. With easy-to-use onscreen tools, managers and administrators can create and modify fields, screens, tabs, tables, views, scripts, workflow, and security settings on the fly. Sage Accpac CRM's customization functionality makes user-specific modifications to interfaces and data quick and easy, ensuring that Sage Accpac CRM easily adapts to your business requirements.

French

German

Spanish

Sage Accpac CRM fully supports global business with advanced multicurrency and multilingual capabilities.

Global Business

Sage Accpac CRM provides multicurrency and multilingual support from a single code base for English (U.S. and U.K.), French, German, Spanish, Dutch, and Japanese, making it a logical choice for businesses around the world. Additionally, you can easily modify these language sets to incorporate "company-specific" terminology. The single-server installation, Web browser, and wireless handheld access provided by Sage Accpac CRM allow employees, partners, and customers to view the information they need any time, from anywhere in the world.
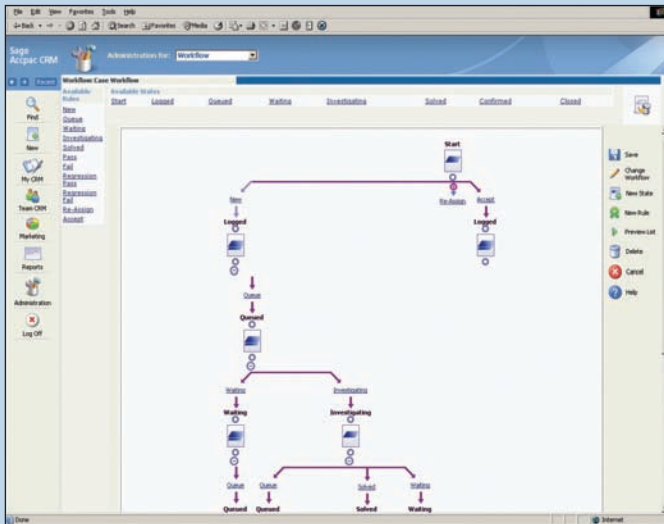
Powerful workflow capabilities allow you to automate, monitor, and alert your staff of critical action items.

Web and Wireless Access

Using a standard Web browser, you can access the full functionality of Sage Accpac CRM anywhere – in your office or on the road. And for those times when a desktop browser isn't handy, you can access the system with your cell phone or wireless PDA. Sage Accpac CRM also provides full support for mobile users even when they are not connected to a network, allowing them to work offline and later synchronize with the central server.

Document Library

The Sage Accpac CRM document library provides a central repository for key files, allowing enterprise-wide access anytime. With Sage Accpac CRM, you store proposals, white papers, FAQs, marketing materials, letters, thank-you notes, quotes – whatever your team needs – in the document library for immediate access to support resources. Even off-line and remotely connected users benefit by having access to the most current versions of library content through remote sychronization capabilities.

Computer Telephony Integration

Sage Accpac CRM combines a fully integrated CRM system with interactive inbound and outbound telephony automation. When a customer calls in, automatic screen pop-up functionality provides key customer information, enabling you to quickly access a complete customer history. Integration with a telephony-enabled network allows users to simply click phone numbers on the screen for fast auto-dialing. You can also forward calls to other CRM users and update client records.

Web Self Service

Sage Accpac CRM Web self-service allows customers to access information or request services and support over the Web whenever they want. Customers receive information based on their preferences, requests, and history through customized partner and customer portals, which provide a single point of contact for information about your products and company. By deploying our integrated knowledge base and taking advantage of its fusion into these Web self-service capabilities, your clients even have the ability to search through your database of support issues and resolutions, achieving a level of self support previously unavailable.

Microsoft Outlook and Lotus Domino Integration

Sage Accpac CRM integrates with today's most popular e-mail and calendar management systems, such as Microsoft Outlook and IBM Lotus Domino. Using Outlook, e-mail can be sent directly from within Sage Accpac CRM or Outlook and all communications can be captured by Sage Accpac CRM and filed appropriately inside your CRM database. You can even access your entire CRM system from within Outlook and retrieve desired information instantly.

When integrated with Lotus Domino, Sage Accpac CRM provides hands-free server-level calendar synchronization to help keep you on track and up to date.
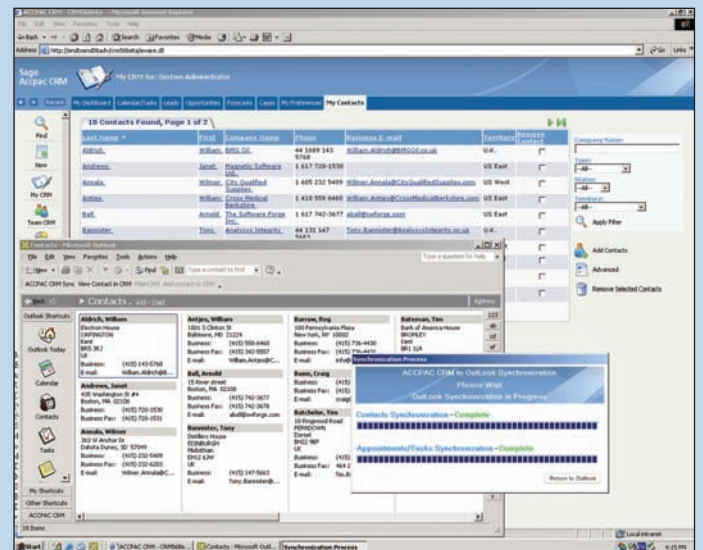
Bi-directional synchronization of contacts, tasks, and appointments between Sage Accpac CRM and Outlook ensures that the information you need is always close at hand.

Sage Accpac CRM puts you in complete control of your sales pipeline with the right tools to effectively manage, forecast, and report through all phases of the sales cycle.

Sales Force Automation

What factors influence why customers purchase your goods and services? Who are your most profitable clients? Being able to answer these questions helps set companies apart and gives them the competitive edge. To succeed, you must have complete control over your sales processes and resources, and access to critical real-time sales information whenever and wherever you need it. Sage Accpac CRM delivers on all fronts.

Sales Forecasting

Sage Accpac CRM includes sales forecasting as a standard feature, allowing sales users to provide forecasts and historical reports to their managers on an as-needed basis. Forecasts roll up throughout the organization and managers have the ability to add their own assessments to the forecasts of their direct reports.

Sage Accpac CRM ensures that leads acquired from your marketing initiatives are distributed and handled immediately.

Account and Activity Management

Sage Accpac CRM provides the tools to manage and analyze all current and historical account details – enabling you to easily identify and recruit new clients and resell to existing ones. Easily manage multiple accounts and opportunities, and automatically distribute leads to sales professionals around the world. Sophisticated workflow features provide automated sales processes to guide salespeople through proven selling methods. Additionally, Sage Accpac CRM is easily configured to routinely trigger literature fulfillment, follow-up appointments, callbacks, daily tasks, and much more!

Sales Cycle Management

Sage Accpac CRM gives you a snapshot of your sales cycle from first contact to final sale, allowing you to effectively analyze and manage the sales pipeline. As a result, you're able to assign a probability of closing the sale at each stage of your business sales cycle; by defining each stage, sales staff and management are provided with real-time rolling forecasts and pipeline analysis. Detailed reporting ensures that time and energy are spent on the deals most likely to close. With Sage Accpac CRM, you can automate the escalation and reassignment of communications and tasks at any stage of the process, so that the employee most qualified to handle the situation addresses your clients' needs. By providing detailed information at every stage of the sales cycle, Sage Accpac CRM is designed to get the right information to the right people, right away.


Sage Accpac CRM provides alerts, follow-up tasks, and territory assignments through lead workflow, guaranteeing your prospects do not fall through the cracks.

Time Management

Sage Accpac CRM has a positive impact on time management and business performance. Onscreen reminder notifications alert you about pending tasks while filter and sort options allow you to manipulate onscreen data to individual preferences, thereby enabling efficient delivery of information.

Sales Force Automation

Keeping mobile sales professionals connected and "in the know" is one of the greatest challenges for companies. With Sage Accpac CRM, you have on-the-spot access to the resources you need to close every sale. While traveling, you can access all aspects of the CRM system from PDAs, WAP-enabled cellular phones, laptops, or other mobile devices. And when you're online, the Web client provides a real-time link to Sage Accpac CRM data for up-to-the-second information about your customers and business.
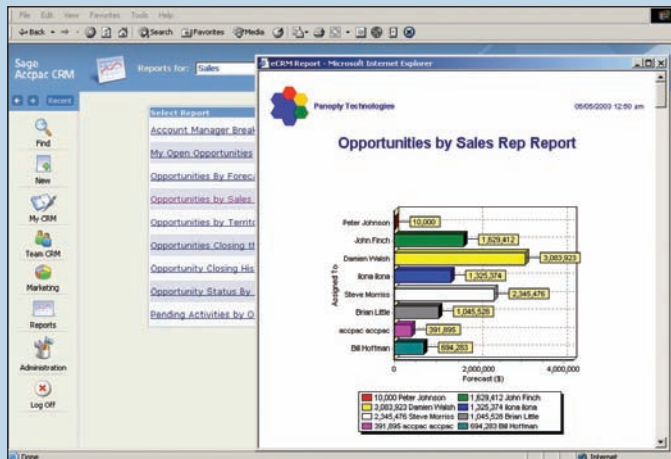
With Sage Accpac CRM sales force automation, you'll always have instant access to real-time sales opportunity analysis.

Solo Server

Sage Accpac CRM Solo Server lets you exploit the benefits of CRM even when you are offline. Easily set up and maintained from within Sage Accpac CRM, the Solo utility provides full support for mobile users, including secure synchronization of laptop computers with data from the central database at the office or via the Internet. Changes made to mobile copies of the database are immediately synchronized back to the main database the next time you're online.

Graphical Analysis and Reporting

Sage Accpac CRM provides point-and-click reporting and graphs for sales teams to access data when making on-the-spot analysis and decisions. With Sage Accpac CRM, you'll always have the real-time information you need, in the format you want (for example, HTML, Adobe Acrobat, Comma Separated Values or Microsoft Excel). Start by evaluating new leads, quoted clients, demographics, and potential deals in the pipeline, then analyze your sales efforts and use that knowledge to refine your strategy.

Graphical forecasting and reporting features filter data any way you choose. Use system default reports or easily create new reports with a reporting wizard that walks you through the process, prompting you to select where and how you would like to see the data. Now you can analyze trends and evaluate historical data to see what's working and adjust what's not.
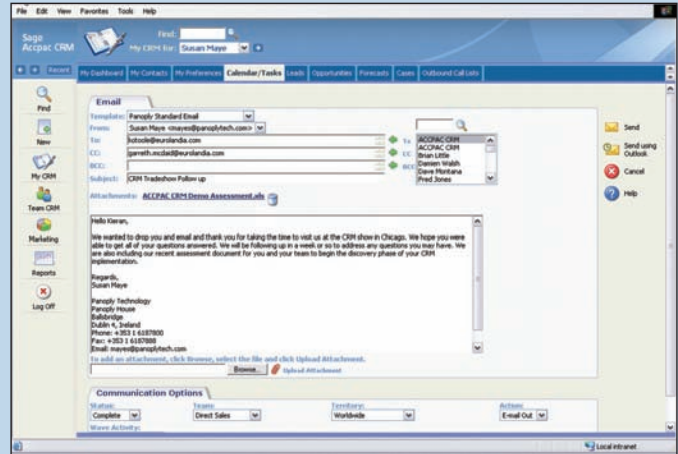

Sage Accpac CRM provides users a calendar of tasks and appointments conveniently integrated with their Microsoft Outlook calendars.

"By automating workflows and providing management oversight, Sage Accpac CRM empowers us with the ability to promptly complete all actions required to make and keep customers satisfied."

Jean-Marc Pigeon, president
Inortech

Sage Accpac CRM provides a single source of customer information to help you better manage your marketing efforts and make sound decisions.
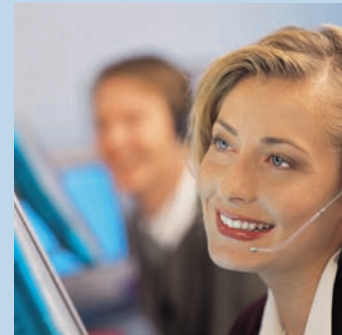
Marketing Automation

In an era where people have virtually unlimited choices regarding how, where, and when they will do business, your challenge is not just to find new customers – but also to understand and retain your current ones. With Sage Accpac CRM Marketing, you can target the right customer at the right time, eliminate guesswork, and put your company's marketing resources to their best use.

Campaign Management

Building lasting and profitable customer relationships means identifying, executing and replicating effective marketing initiatives across all your sales channels. With Sage Accpac CRM, marketing teams can analyze unlimited demographic information with customer-specific direct marketing campaigns. Assign, schedule, and track marketing activities within a campaign – and view every detail at a glance.
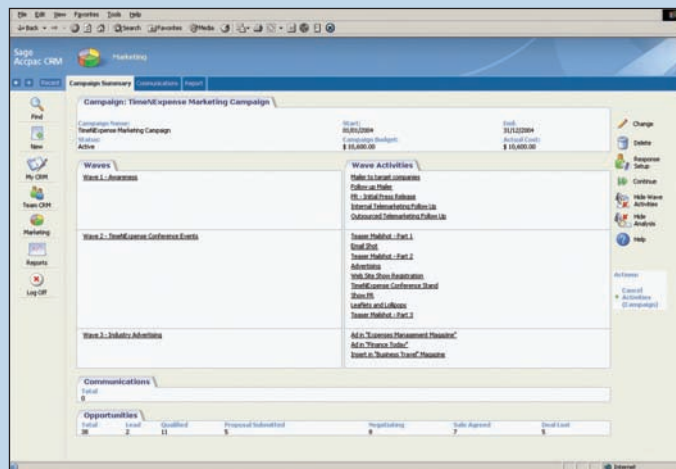

With Sage Accpac CRM, you can track every phase of your marketing campaigns – from lead tracking to win/loss analysis to complete campaign budget management and more – and provide meaningful analysis.

E-mail Management

Sage Accpac CRM makes it easy to distribute mass e-mail, and provides the ability to send HTML e-mail, create e-mail templates, and send attachments to bulk e-mail messages. The actual communication is stored in each client's history, ensuring that you can easily look up the specific e-mail message when clients call or write about a particular campaign.

List Management

Sage Accpac CRM provides the tools for marketing teams to easily create new target lists from selected criteria, re-use successful campaign lists, or import mail-house lists. An integrated mail-merge function merges documents with customer lists. Once these lists are created, Sage Accpac CRM automatically creates a record in the customer account, attaching the marketing piece to the account for later viewing by sales, marketing, and customer service staff.
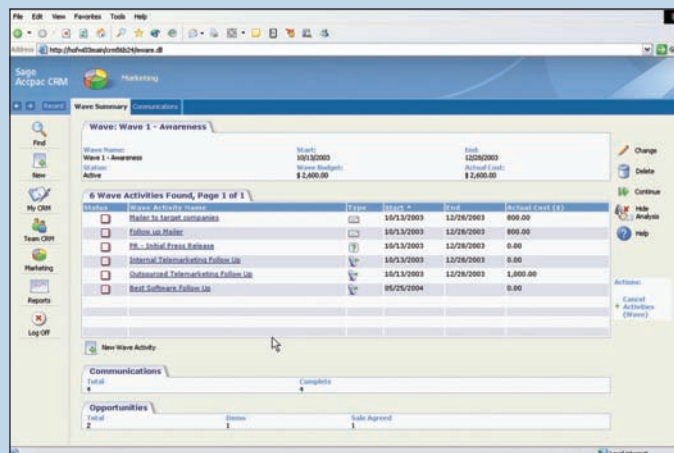
Sage Accpac CRM establishes enhanced contact lists through simple point-and-click management so you can start using them quickly.

Key Attribute Profiling

Sage Accpac CRM key attribute profiling enables you to build a detailed profile of your customers and prospects over the course of the relationship. These attributes are stored, reported on, and used as a basis for future marketing activities. Key attributes are user-defined and easily track the date and call-to-action for a campaign, while providing real-time budget/cost analysis for every level of your marketing effort.

"We were blown away by what we saw in the product demo. Sage Accpac CRM offered everything we were looking for. We're getting an immediate ROI and realizing big productivity gains."

Eric Robichaud, CEO
Mediaweave

Outbound Call Management

With Sage Accpac CRM, outbound calls are easily integrated into any marketing campaign. It's simple to set up target lists, and calls are dynamically allocated so they can be scheduled as CRM users become available. The system even allows you to schedule follow-up calls at times convenient for prospects or customers.
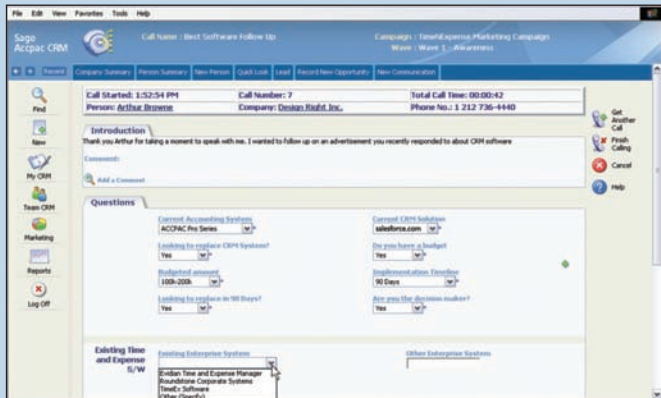

Sage Accpac CRM provides the tools to manage and analyze all current and historical account details and activities.

Marketing Evaluation Tools

View your campaign status any time and evaluate ROI. Analyze marketing campaigns by lead source or evaluate other important campaign details by using sophisticated tools and reports. Sage Accpac CRM not only tracks response rates, it also lets you match sales revenues to specific campaigns, providing immediate cost against sales analysis data.

Sage Accpac CRM allows you to analyze and modify campaigns, ensuring improved return results, quality responses, and increased sales opportunities. Drill down to specific activities within a campaign including communications, opportunities, responses, budget, actual cost, and target prospects. Determine what your customers and prospects want and retain that information to produce more effective marketing campaigns. Eliminate the guesswork in your marketing and put your company's marketing resources to their best use!
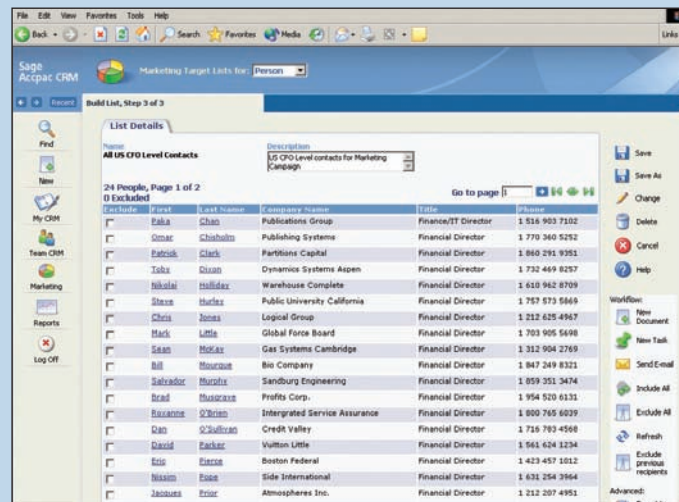
With Sage Accpac CRM, you get powerful and flexible profiling of your customers and prospects based on user-defined criteria, direct integration to mass e-mail, and other valuable tools to enhance your marketing strategy.

With Sage Accpac CRM, your field staff has instant access to the information they need most. All they need is a smart phone, PDA, or computer with Internet access. It's that simple!

"Sage Accpac CRM continues to meet our requirements by providing our entire enterprise access to the data needed to close sales, satisfy customers, and build long-lasting relationships."

Tim Baker, director of information systems
Source Technologies

Sage Accpac CRM empowers your organization with the information it needs to build and support long-term customer satisfaction and loyalty.

Customer Care Automation

Good sales and marketing efforts deliver customers to your business. But that's just the start. Your customer support department develops the relationships that create customer loyalty and generate repeat sales. With the cost of acquiring customers as much as seven times higher than retaining them, creating the ideal customer experience is the key to success. With Sage Accpac CRM customer care, you'll build and manage lasting customer relationships, providing the service your customers need and expect.

Sage Accpac CRM enables you to effectively manage, analyze, and respond to support issues at all levels of your organization. With advanced e-mail and workflow integration, Sage Accpac CRM ensures that all customer cases are promptly resolved.

Contact Management

To deliver superior customer service and exceed your customer support performance goals, your staff must have the most up-to-date and complete customer data at its fingertips. With an enterprise-wide view of your customers, you can manage for profitability by effectively resolving service issues and creating cross-sell or up-sell opportunities. After all, customers interact with your support team more frequently than with anyone else in your company. Sage Accpac CRM provides real-time access to relevant customer data including purchases, call and escalation history, interactions, multiple contacts, support cases, e-mail, documents sent and received, and sales opportunities. With Sage Accpac CRM, you can make the most of every customer interaction, maximizing business opportunities and customer satisfaction.

Workflow Integration

Sage Accpac CRM makes building and retaining your customer base easier than ever by ensuring that customers receive flawless service at every step, whether they choose to interact with your company through e-mail, the telephone, or the Web. By implementing a structured workflow that automates predetermined business rules across all channels, departments, and employees, Sage Accpac CRM can effectively monitor every customer issue throughout its lifecycle. Actions requiring specialized attention are automatically routed to the appropriate employees or partners.

Service Level Agreements

The ability to track and meet service level agreements (SLAs) against your support cases is critical for maintaining loyal, dedicated customers. Sage Accpac CRM cases have a "traffic light" monitoring system, which indicates how close the case is to exceeding an SLA, and allows triggering of escalation events at predefined times in the process.

Call Center Accuracy

As a central repository for all customer data, Sage Accpac CRM provides easy-to-use, real-time access to information, enabling you to resolve customer issues quickly and efficiently, reducing call times and increasing the effectiveness of your call center. You can escalate and prioritize issues and reduce the amount of time required to resolve each call – for added customer loyalty and confidence. Through the user-friendly interface, recent history buttons, call and e-mail interaction logs, and hypertext search capabilities, Sage Accpac CRM keeps critical information at your fingertips – helping customer support professionals find what they need, when they need it.

Knowledge Base

With Sage Accpac CRM, you store support incidents and case resolutions in a central knowledge base. Resolutions are linked to multiple cases and automatically e-mailed to users and customers. The knowledge base is accessible to all Sage Accpac CRM users and to customers through the customer self-service area.

Enhanced Reporting

With Sage Accpac CRM, you can generate presentation-quality, device-independent reports in Adobe Acrobat format (PDF) on demand for every report within the system, making it easy to e-mail reports to staff who may not have access to your Sage Accpac CRM system. When you want quick, one-page overviews of key facts, summary reports provides at-a-glance coverage of what matters most.

About ACCPAC and Sage Software

ACCPAC International, Inc., a Sage Software company, provides small and midsized businesses with a broad range of end-to-end business management applications designed to help customers enhance their competitive advantage. Look to ACCPAC for fully integrated business management applications that deliver high performance, advanced functionality, cross-product integration and unmatched freedom of choice.

Sage Software offers leading business management products and services that support the needs, challenges, and dreams of more than 2.4 million small and midsized customers in North America. Its parent company, The Sage Group plc (London: SGE.L), supports 4.5 million customers worldwide. For more than 25 years, Sage Software has delivered easy-to-use, scalable, and customizable applications through its portfolio of leading brands, including Abra, ACCPAC, ACT!, BusinessWorks, CPASoftware, FAS, MAS 90, MAS 200, MAS 500, MIP, Peachtree, SalesLogix, and Timberline Office, among many others.

ACCPAC Offers Fully Integrated Business Management Applications

- Accounting and Operations
- Customer Relationship Management (CRM)
- Human Resource Management
- Warehouse Management
- Electronic Data Interchange (EDI)
- E-Commerce
- Point of Sale
- Project and Job Costing
- Fixed Assets
- Business Analytics
- Enterprise Reporting
- Hundreds of Industry-specific Solutions

ACCPAC Offers Unmatched Freedom of Choice

- True integration across applications
- Advanced Web and wireless access
- Flexible deployment and purchasing options
- Scalable, open architecture
- Advanced customization
- Microsoft Windows or Linux operating system support
- IBM DB2, Microsoft SQL Server, Oracle, Pervasive.SQL, and Sybase database support
- Full multilingual and multicurrency capabilities
- And much more!

Visit www.accpac.com or call 800-873-7282 today for more information about ACCPAC end-to-end business management applications.

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