



# CRM

## Integrating Sage CRM with Sage MMS

Implementing a series of integrated systems is the simplest way to realise the hidden value in your IT investment. Sage has developed links between its leading Sage CRM and Sage MMS products that allow you to do this. As a result a number of benefits can be obtained such as the removal of double entry of customer details and the provision of key financial information to those that need it allowing customer-facing staff to check immediately on credit status, to generate orders and quotes or to complete a transaction on the phone all through a single CRM system.

### Features

- Linked Accounts
- Accounting Information & Customer Turnover
- View Products, Stock & Prices
- Customer Price Enquiries
- Sales and Product Information
- Sales Orders and Quotes
- Order History
- Invoicing
- Wizard Driven Configuration
- Customisable

### Sales Advantages

Sales people have greater flexibility in managing their accounts and can respond more quickly to customer requests. As a result sales professionals have access to relevant information, without having to leave their CRM screen, they can view customer data such as credit status, account balance, aged debtors, order history and turnover.

### Eliminate Duplication of Effort

Businesses that integrate their Sage CRM systems with their Sage back-office solutions will experience a number of benefits. One of the most obvious is 'once-only' data entry, whereby a customer's details are input only once through your CRM system and then automatically updated across the accounting and CRM system. It also works the other way round, with new or amended entries in the accounting system automatically updating the CRM database. Not only does this save time by reducing duplication of effort, it also means that potential mistakes and conflicting data are minimised.

In Sage CRM view key financial information from Sage MMS at the click of a button.

The screenshot displays the Sage CRM interface for a customer account. Key sections include:

- Account Information:** Shows account reference (AB001), account name (Abbey Retail Ltd), account balance (£20,000.00), and credit limit (£20,000.00).
- Customer:** Lists salesperson (JFK Jack Powers), region (SCOT/Scotland), and analysis codes.
- Aged Balances:** A table showing debtors aged by days (Over 30 days, Over 60 days, Over 90 days, Over 120 days) with a total of 9,533.07.
- Customer Turnover:** A table with columns: Order No, Start Date, End Date, Invoices, Credit Notes, Receipts / Payments. It lists 12 orders from 1/1/2005 to 1/12/2009.

In Sage CRM you can view, drill down to, and create quotes/sales orders that sit in the Sage MMS system

The screenshot displays the Sage CRM interface for an order. Key sections include:

- Order Details:** Shows order number (000000AB01), customer order number, and order status (04/04/2004).
- Address:** Lists the customer's address (Abbey Retail Ltd, 14 Church Lane, Leithvale, Edinburgh, Midlothian, EH12 1JH).
- Line Items:** A table with columns: Description, Quantity, Unit Price, Total Price, Tax %, Line Status, and Net. It lists three items: Beech Base Double Cabinet H80cm (20.00 units, 234.00 total), Beech Base Single Cabinet H80cm (14.00 units, 143.20 total), and Beech Wall Cabinet H70cm (14.00 units, 152.10 total).
- Totals:** Shows a net total of 11,975.30, tax total of 2,404.07, and a grand total of 14,379.37.

## The following features are available to users of the integrated solution

### Accounting Information

- Give customer-facing personnel the information they need to deliver excellent customer service
- Display credit limit, current balance, aged debtors and other information directly in your CRM application
- Drill down to see open sales orders, quotations and invoice turnover history

### Order History

- View all sales orders and quotations
- View despatch information
- Reference PO numbers, prices, tax, discount, quantities and freight information
- View order date, number, and status etc
- Drill down to product details

### Sales & Product Information

- View year/month-to-date sales
- View sales by product quantity, price and total value
- View by last purchase date
- Customer Price Enquiries
- Stock Lookups

### Sales Orders and Quotes

- Allows front office staff to enter sales orders, quotations and invoices into the accounting system using MMS screens directly through Sage CRM
- Orders are validated with current pricing, shipping and tax information in MMS and available to view in CRM
- Avoids duplication of back office pricing and discount mechanisms

### Linking Accounts

- Avoids replication of data, deploys a 'smart link' strategy
- Users can create and link accounts or can link to existing accounts
- Changes are submitted and synchronised automatically

### View Products, Stock and Prices

- View your accounting system products into your CRM system
- Check stock at different warehouses
- View product purchase history by customer

### Wizard-Driven Configuration

- Reduces the time and complexity of deployment
- Utilises industry technical standards providing a familiar working environment
- Delivers out of the box integration

### Customisable

- Replicate manual business functions with automated workflow processes
- Can be tailored to accommodate individual end-user requirements
- Works with existing Business Partner customisations



Call Sage on **0845 111 9988** for further information

### About Sage

Sage is a global provider of end-to-end business management applications for small to mid-size businesses. Look to Sage for fully integrated software that delivers high performance, advanced functionality, cross-product integration and unmatched freedom of choice. Sage provides companies with the solutions they need to enhance competitive advantage and increase profitability. For more information, visit [www.sage.co.uk](http://www.sage.co.uk) or contact us on 0845 111 9988.

### Sage Application Integration Server

Sage's Application Integration Technologies is the standardised framework for the integration of Sage's products. It utilises industry leading technology to make the links between products secure, stable and dynamic meaning the user need only be concerned with what it does and not how it does it.

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