



Used in association with the sales management function, the CRM module enables the user to improve management of customer relations. Upstream, it is used to organize and monitor marketing campaigns, manage direct mailing and telemarketing and set up trade shows and press campaigns.

This module is used by the sales force on a daily basis to monitor jobs and organize tasks (customer job monitoring, management of incoming and outgoing calls, tasks, meetings and contacts). The CRM module is used in particular for comprehensive management of equipment populations and customer service operations.

### A Broad and Integrated Approach

While most CRM packages were developed to interface with legacy business systems, Sage ERP X3 CRM was designed from the start as a fully integrated module within the Sage ERP X3 enterprise suite. The sales support functions are linked directly to Sage ERP X3 Sales features such as quotation management and sales order entry, saving significant entry time and fostering an error-free environment.

Finished goods shipped on customer orders are automatically available to be serviced in the customer support area of Sage ERP X3 CRM. This inherent integration results in significant time and cost savings, lowering the total cost of ownership for the Sage ERP X3 application.

### A Flexible Database of Business Partners and Contacts

Sage ERP X3 CRM shares critical data with other portions of Sage ERP X3. Relationships can be managed with normal business partners (prospects, customers, suppliers, etc.) or directly with independent contacts, with whom no relationship yet exists. Business partners may have an unlimited number of contacts, each of whom may play different roles, and contacts may be associated with several different business partners. A portal calendar provides easy visual access to events.

### Sales Support

This portion of Sage ERP X3 CRM module can result in significant benefits to a company's sales department by providing a range of tools for managing customer relations and activities. Using a set of pre-sales actions, the sales staff can schedule appointments, log both inbound and outbound phone calls, assign critical tasks, check on late actions that need to be done by co-workers and obtain an overall view of the activities on a particular prospect or customer. Sales opportunities can be registered and the key pre- and post-sales steps set up so that the entire sales process can be controlled up to the creation of a sales quote, which can be tied directly to the opportunity defined in Sage ERP X3 CRM.

Sales objectives can be defined so that management can easily determine sales performance (actual revenue versus forecast) by sales rep and/or other important criteria.

### Marketing Campaigns

A company's marketing group can benefit from the Sage ERP X3 CRM management tools, global visualization screens and functional control over marketing campaigns. A marketing manager can easily follow the activities that are in progress and can quickly compare their projected costs to the overall campaign budget. "Assistants" are provided to facilitate the creation of mailing and phone campaigns, and to record media and trade show events.

### Customer Support

Sage ERP X3 CRM also provides means for managing the customer base after sales are made by tracking service contracts and information about units installed at customer sites. From this set of data, service requests can be processed for fault diagnosis, repair and advice. Responsibility and control are established by the service contracts, which specify the terms and conditions of the warranties and maintenance agreements, and the level of service to be delivered. A dynamic service "knowledge base" is available for service personnel to shorten the time it takes to find solutions to requests. An automatic assignment process will quickly select the most qualified employees for a particular service problem.

A service "workbench" is available with which to view all service requests in the queue (in process or late), responses pending, status of service centers and work queues and service employee work statistics. Customer support can be initiated and managed either internally or by authorized customer personnel.

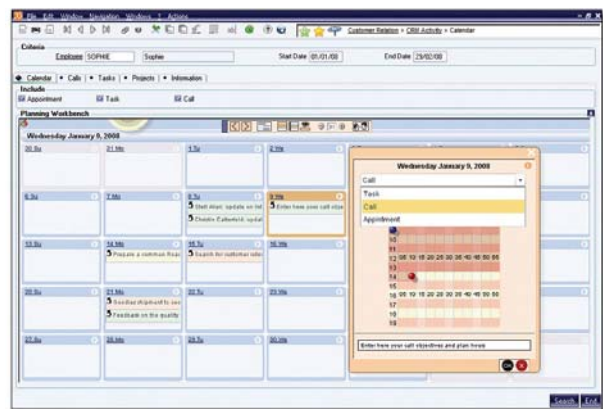
### Management Reports

Sage X3 CRM provides a set of summary reports, created using Crystal Reports™, which support activities in three main areas – Marketing, Sales and Service. All reports can be easily personalized. Some examples are:

- Activity analysis by sales rep
- Sales opportunity analysis
- Late service requests
- Expiring contract listing
- Effect of marketing activities

### Microsoft Office Integration

Sage ERP X3's seamless integration with Microsoft Office allows users to manipulate Office documents (images, video, Excel or Word documents, etc.) within the context of CRM operations. For example, mailings may be stored in the system database in MS Word format as part of marketing campaign data. More importantly, the CRM functions of Sage ERP X3 may be set up to work in sync with Microsoft Outlook, allowing users to synchronize tasks, calendars, meetings and contacts from their local folder.



CRM Calendar

# Functions and Features

## Sales Support

### Prospects/Customers

- Automatic update of the steps in a sales cycle
- Secondary sales reps (possible by product groups)
- Inquiry on the entire pre- and post-sale history
- Automatic control over converting a prospect into a customer

### Contacts

- Managed independently from business partners
- Multiple relationships with companies, sites and business partners
- Inquiry on the entire pre- and post-sale history

### Sales Objectives

- Forecast entry
- Definitions of objectives
- Calculation of the variances of actual results to forecasts
  - Accumulated per month
  - Expressed as an amount and percentage
- Breakdown of the objectives according to multiple criteria
  - Month by month for a fiscal year

### Appointments, Calls and Tasks

- May be managed using approximate dates
- Control over employees' scheduling conflicts with direct re-scheduling when necessary
- Resource reservations
- Appointment address search
- May be managed using approximate dates
- Automated call reporting
- Call attempts
- Phone number search
- Late warnings to the requester of the task
- Interfaces to Microsoft Outlook

### Opportunities/Projects

- Competitive information
- Pre- and post-sale steps
- Associated projects
- Flow control to create sales quotes
- Quotes by opportunity and project
- Double expected value weightings on revenues

### Sales Workbench

- Global view of pending and late sales activities
- Quick search on the contact who is calling

## Customer Support

### Customer Database

- Units installed at customer sites
- Specific physical location
- Associated service contract history
- Successive installation history

### Products

- Associated warranties
- Service contract templates
- Warranty tickets

### Service Contractors

- Partner contractor skills
- Service response fields
- Collaborative financial conditions

## Service Callers and Requests

- Several service callers per customer
- Dynamic service caller parameters and information
- Service caller assignment by user
- Automatic assignment of requests by skill groups
- Assignment possible on:
  - Service site
  - Personnel
  - Queue
  - Redirect to sales rep
- Automatic control over the coverage of a request
- Solution search in a problem/solution knowledge base
- Request report history
- Semi-automatic creation of sales quote and customer appointment
- Creation of solution record when service is complete
- Warranty requests

## Service Contracts

- Automatic creation of service contract templates
- Service contract invoicing
- Contract renewal
- Indexing databases
- Automatic contract revaluation
- Contract service constraints
- Skill groups covered
- Products and services covered
- Maintenance and warranty contracts

## Service Responses

- Automatic search for most qualified service employees
- Automatic search for service contractors who are qualified in the service response domain
- Schedule conflict control

## Knowledge Base

- Search by skill group
- Search on content
- Quick search on multiple keywords

## Service Workbench

- Requests for overdue and pending services
- View of late service responses and pending responses
- Dispatching content
- Statistics on personnel and queue workload
- List of service contracts to be renewed

## Marketing

### Competing Products

- Competitors
- Average sell prices
- Strengths and weaknesses

### Marketing Campaigns

- Planned and actual budget used by a campaign
- Creation of the marketing activities
- Automatic return tracking

### Marketing Plan

- Tree-structure view of the campaigns and ongoing activities

### Mass Mail Assistant

- Recipient selection
- Combining lists (merge, intersect, etc.)
- Message design
- Creation of the mailing history

### Phone Campaign Assistant

- Definition or recall of phone call targets
- Distribution of calls to tele-reps by various user-defined methods
- Definition of call scripts

### Trade Show Assistant

- Entry of booth characteristics and cost

