



SAGE CRM

EXTENDED PROFILE



OVERVIEW

Sage CRM is a CRM solution aimed at small, medium and large businesses. It is offered as a stand-alone solution or can be integrated with other Sage products.

An interactive dashboard acts as a central hub for Sage CRM's sales features, allowing users to monitor and manage opportunities, reports, and forecasting from one place. Managers and directors can access KPIs and evaluate progress reports in the business accelerators suite and territory management features break down performance into regions and sub-regions.

A key feature of the Sage CRM package is the detail in which it allows users to create and evaluate marketing campaigns. Every element of a campaign can be tracked, evaluated and the results shared via actionable reports with the wider sales team.

Sage CRM is offered as both cloud and on-premise solutions; the cloud subscription pricing is based on a per-user, per month basis while the on-premise pricing is billed per-server and per-user. The software can be accessed on a PC or via one of the Sage mobile apps for Android, iPhone and Windows 8.

FEATURE OVERVIEW

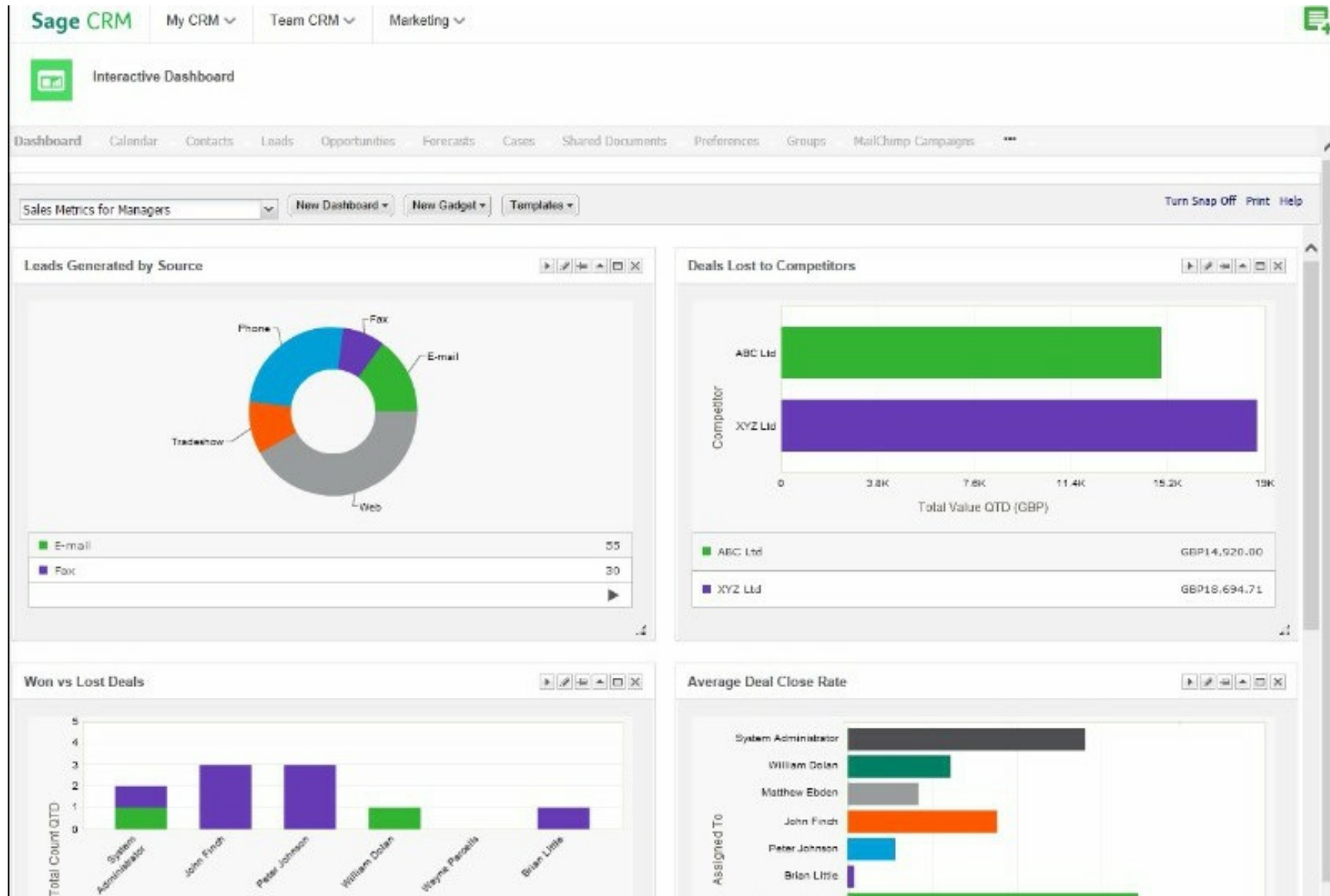
SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	Sage CRM
SOFTWARE FEATURES	
API ACCESS	✓
CADENCE	✓
CONTACT MANAGEMENT	✓
CONTRACT MANAGEMENT	✗
DATABASE MANAGEMENT	✓
FUNNEL REPORTING	✗
INTEGRATIONS	✓
PARTNER TRACKING	✗
PERFORMANCE REPORTING	✓
PIPELINE MANAGEMENT	✓
PRODUCT & PRICE CONTROL	✗
SALES GAMIFICATION	✗
QUOTATION HANDLING	✓

TASK ASSIGNMENT	✓
TERRITORY/QUOTA MANAGEMENT	✗
SUPPLEMENTARY FEATURES	
CPQ	✗
CUSTOMER SERVICE AUTOMATION	✓
MARKETING AUTOMATION	✓
SOCIAL RELATIONSHIP MANAGEMENT	✓
CUSTOMER SIZE	
SMALL (1-50 USERS)	✓
MEDIUM (51-200 USERS)	✓
ENTERPRISE (201+ USERS)	✓
OTHER FEATURES	
MULTIPLE LOCATIONS	✓
MULTIPLE CURRENCY	✓
CUSTOMIZABLE	✓
MOBILE FEATURES	
IOS APP	✓
ANDROID APP	✓
NATIVE WEB APP	✓
HOSTING METHOD	

CLOUD	✓
ON-PREMISE	✓
FURTHER INFORMATION	
PRICING	Not Available

SOFTWARE SCREENSHOTS



Sage CRM Interactive Dashboard

Service Desk Dashboard

My Dashboard Task List

Incident No.	Name	Status	Created Date	Ass.
12	new task...	Accepted	15/04/2012	...
1-10102	Phase re...	Logged	15/04/2012	...
1-10104	Phase re...	Logged	15/04/2012	...
1-10104	Look into it	Logged	15/04/2012	...
1-10105	IMMEDIATE	Logged	15/04/2012	...

Incidents by SLA Severity

Current Problems

6 Records in Total

Legend: Logged (2), Investigating (1), Active (3)

Sage CRM Dashboard

My CRM for: William Cohen

Statistics for All Users

Number of Opportunities: Forecast: Weighted Forecast
 Average Value: GBP 435,811.64 Average Certainty: 65.07% Weighted Average: GBP 33,324.71

7 Opportunities, Page 1 of 1

Opportunity	Description	Contact Name	Owner	Created	Signal	Priority	Territory
10 User pilot consulting	Design Right Inc.	Annae Irvine	3/20/2016	8:22 AM	Negotiating	Normal	US East
100 User Screens	Euroband	Kelvin O'Toole	11/29/2016	8:11 AM	Qualified	Normal	US East
Training course	Galecom Ltd	Simon Yelley	8/11/2017	12:29 PM	Proposal Submitted	High	US West
20 User Deal	Harold Controls Limited	Tony Smith	11/21/2016	7:21 AM	Qualified	Normal	US East
100 User Global Lead	Marevic Pipers	Annette O'Toole	11/29/2016	8:23 AM	Proposal Submitted	Normal	US Central
10 User Pilot	Marevic Pipers	Annette O'Toole	10/27/2016	8:41 AM	Sale Agreed	Normal	US Central
Phase 2: 30 User rollout	Marevic Pipers	Annette O'Toole	10/27/2016	8:47 AM	Proposal Submitted	Normal	US Central

Sage CRM Windows Internet Explorer

35 Opportunities, Page 4 of 4

Opportunity	Description	Contact Name	Created	Signal	Priority	Territory	Forecast	Weighted Forecast
Bank Case	GD	William Cohen	10/26/2016	1:20 PM	2	US East	1,200.00	1,200.00
Bank Case	GD	William Cohen	10/26/2016	1:20 PM	2	US East	200.00	200.00
Bank Case	GD	William Cohen	10/26/2016	1:20 PM	2	US East	200.00	200.00
Bank Case	GD	William Cohen	10/26/2016	1:20 PM	2	US East	200.00	200.00
Bank Case	GD	William Cohen	10/26/2016	1:20 PM	2	US East	200.00	200.00

Sage CRM Dashboard

Interactive Dashboard

Current Issues

0 Cases, 12 Opportunities, 27 Comments/Alerts

My Opps

Oppo Details

Activities