

Sage CRM Essentials

A cloud-based solution, Sage CRM Essentials helps manage your sales pipeline and co-ordinate calendars, while giving you instant and transparent access to the information you need. Get up and running immediately, accelerate your sales performance, and analyse, manage and collaborate on all your opportunities with Sage CRM Essentials.

Get up and running immediately with our powerful, web-based Sage CRM solution

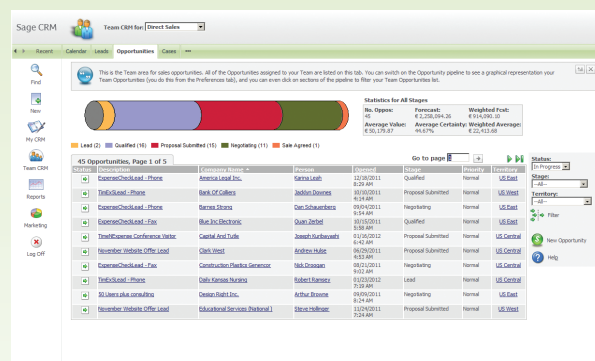
Sage CRM Essentials gives you a single source of sales information in a simple to deploy and administer cloud-based solution. Workflow and pipeline management capabilities help you to progress sales opportunities, while ensuring that data is can be accessed by anyone that needs it. By helping to drive sales productivity it can help you to protect margins, reduce your cost of sale and customer attrition while also eliminating process bottlenecks.

Sage CRM Essentials includes:

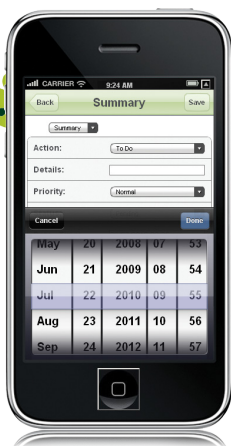
- Contact Management
- Opportunity Management
- Sales Forecasting
- Quotes & Orders
- Lead Management
- Interactive Dashboard
- Reporting
- Find/Advanced Find
- Group Management
- Outlook Integration (Lite)
- Mobile Device Support (Apple iPhone, Android™, Tablet)
- Twitter Integration
- Cross-Browser Compatibility
- Standard Customisations
- Data Import
- Essentials User Management

Perfect for:

- Tracking the sales process quickly and easily
- Focusing on the most profitable sales opportunities
- Getting the information you need in the office or on the move
- Maximising the value of each and every sales opportunity in your pipeline through accurate decisions based on valuable information
- Having a single shared view of every sale
- Developing a deeper understanding of your sales performance



- Sage CRM equips your mobile workforce with access to critical customer information while they are on the move through the Apple iPhone, Android™ and Tablet.



- With Sage CRM Essentials, opportunities can be tracked in real-time and assigned to members of the sales team to action accordingly

Experience the difference Sage CRM can make to your business with our free 30 day, no obligation trial – visit sagecrm.com/uk

Sage CRM Editions

Functionality	Essentials	Professional
Base Functionality		
Contact Management - Companies, People, Address, Phone number, E-mail	✓	✓
Calendar Feature	✓	✓
Document Management	✓	✓
Interactive Dashboard	✓	✓
Cross-Browser Compatibility	✓	✓
Export reports and lists to PDF	✓	✓
Export reports and lists to CSV	✓	✓
Group Management - Mass Tasks, Document Mail Merge, Group Email, Export	✓	✓
Advanced Find	✓	✓
Microsoft Outlook Lite	✓	
Classic Microsoft Outlook Plugin		✓
Mobile Device Management	✓	✓
Reporting	✓	✓
Multi-currency enabled	✓	✓
Sales Force Management		
Sales Opportunities	✓	✓
Opportunity Pipeline Management	✓	✓
Opportunity Tracking	✓	✓
Sales Forecasting	✓	✓
Quotes and Orders Management	✓	✓
Product Management	✓	✓
Lead to Opportunity Conversion	✓	✓
Web to Lead	✓	✓
Marketing & Customer Services		
Marketing Automation		
Campaign Management		✓
Campaign Group Actions - Email, Outbound Call List, Export to CSV, Mail Merge		✓
Outbound Call Handling		✓
Customer Care		
Case Management		✓
Knowledge Base/Solution Management		✓
Twitter Integration	✓	✓
User Management		
User Administration	✓	✓
Personal User Preferences	✓	✓
My CRM to manage my information	✓	✓
Team CRM to manage workgroup information	✓	✓
Preloaded themes to change the look and feel of the UI	✓	✓

Functionality	Essentials	Professional
Security		
Field Level Security to control data access	✓	✓
Territory Management		✓
Roles-based security		✓
Add, move, edit, merge, and rebalance territories		✓
Customisation Capabilities		
Screen/List Management	✓	✓
Field & Caption Management	✓	✓
View Management		✓
Notifications	✓	✓
Advanced Customisations		
Escalation rules (*Pre-Configured Only)	✓	✓
Edit Escalation rules (*Pre-Configured Only)		✓
Workflow Management		✓
Add Client Side actions to workflows		✓
Integrations		
Real Time SData Feeds	✓	✓
Developer Interfaces		
SOAP web services API		✓
Data Management		
Data Upload from CSV	✓	✓
Product List Management	✓	✓
De-Duplication		✓
Forecast Management	✓	✓
Database Export	✓	✓
Manage Relationship Types		✓
Key Attribute Data		✓
Email & Documents		
Spellchecking	✓	✓
Library Management	✓	✓

Sage CRM

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