

## SAGE CRM SALESLOGIX

## CRM and Accounting Integration

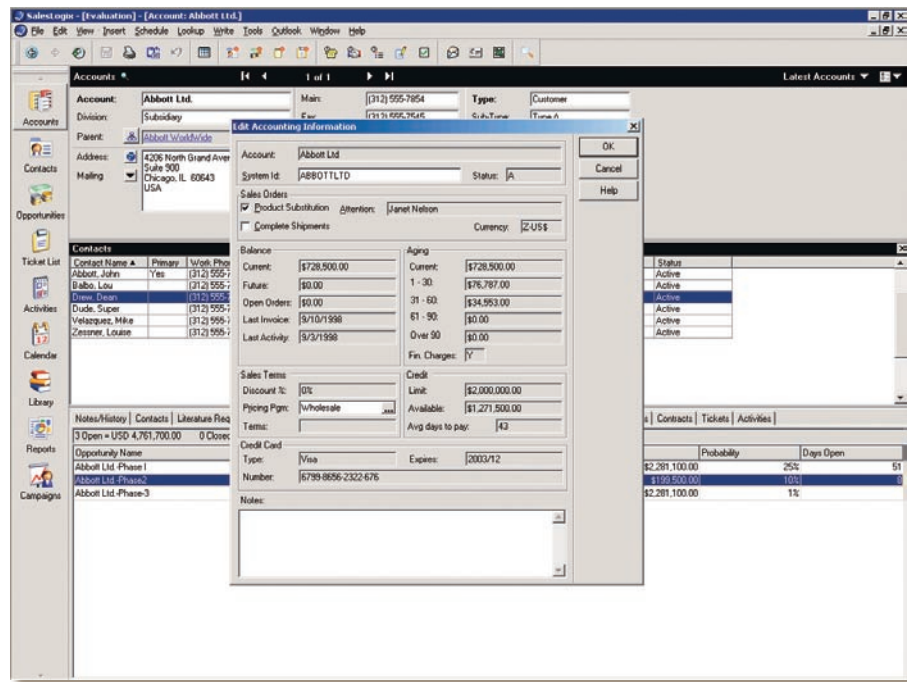
### CRM AND ACCOUNTING INTEGRATION

Sage CRM SalesLogix is an integrated customer relationship management (CRM) suite that includes Sales, Marketing, Customer Service, and Support solutions. Sage CRM SalesLogix offers integration with multiple back-office accounting and financial applications.

#### FEATURES

Integration between Sage CRM SalesLogix and back-office accounting and financial applications provides organizations with a complete view of all customer interactions for making more insightful business decisions.

- Accounting Information
- Invoice History
- Open Invoices
- Open Orders
- Payments/Receipts
- Product Information
- Inventory
- Pricing
- Groups and Reports
- Orders and Quotes



Sage CRM SalesLogix Accounting Integration enables you to view accounting information such as open orders, aging A/R, and credit limits from within the familiar Sage CRM SalesLogix interface.

#### Access to Critical Back-Office Customer Data

Integration between Sage CRM SalesLogix CRM and your back-office accounting application provides your sales professionals access to the most current product information, pricing, discounts, and inventory when creating quotes or taking orders. In addition, without having to leave Sage CRM SalesLogix, they can view all relevant customer data, such as credit status, terms, and account balance so they can better service customers.

#### Increased Efficiencies in Accounting

Integration reduces the time and resources required of Accounting to support your sales team. Integrated front and back-office systems reduce duplicate data and order entry. And, by driving current product pricing and discounts into Sage CRM SalesLogix from your back-office system, the number of inquiries from Sales regarding product, orders, invoices, and outstanding balances will be reduced.

#### Timely Customer Service

In the end, not only will your organization benefit from CRM and accounting integration, but so will your customers. Sales representatives have access to complete customer information when handling inquiries and placing orders. And because processes between your CRM and accounting systems are automated, orders move to accounting more quickly and customers receive product sooner, which will positively impact your organization's customer satisfaction.



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*"Sage CRM SalesLogix allows us to review orders from customers all over the world on a daily basis. We can review activity on a daily, weekly or monthly basis and see exactly which products have shipped and confirm that the shipments were on time. Our sales people have all the information they need when talking to customers."*

Kedar Murphy  
Cabot Corporation

### FEATURES

#### Accounting Information

- View credit limit, current balance, and aging A/R
- Access account type, status, tax schedule, and comments
- View last activity, sales YTD, and average days to pay

#### Historical Invoices and Orders

- View invoice number, date, type, and vendor
- Reference PO numbers, amounts, tax, discount, and freight information
- Evaluate open invoice due dates, balance, and status
- View order date, number, type, and ship-to information

#### Payments/Receipts

- View check date, invoice number, check number, transaction amount, and status

#### Product Information and Inventory

- View product name, part number, family, group and type
- Access pricing, discount schedules, substitute products, units, inventory, and costs
- View product inventory on hand, available, allocated, and on backorder

#### Quotes and Orders

- Generate quotes and orders and associate with customer record

### About Sage CRM SalesLogix

Sage CRM SalesLogix is the customer relationship management solution that enables small to medium-sized businesses to cultivate profitable customer relationships by increasing sales and marketing performance and maximizing customer satisfaction and loyalty. Designed to meet the distinct needs of small to medium-sized businesses, Sage CRM SalesLogix delivers integrated Sales, Marketing, Customer Service, and Support automation solutions that adapt to your unique customer acquisition, retention, and development processes.

Sage CRM SalesLogix provides a complete CRM solution with low cost of ownership, rapid time to productivity, and high return on investment. Flexible and easy to use, Sage CRM SalesLogix readily accommodates growth and changing business requirements.

Sage CRM SalesLogix, the SMB CRM leader with more than 7,000 customers worldwide, is part of the Sage Software family of integrated business management solutions.

### About Sage Software

Sage Software has been responding to the needs, challenges, and dreams of small and midsized businesses like yours for over 25 years. With a complete range of business management solutions and services, Sage Software helps companies improve customer relationships, reduce costs, and automate and integrate a variety of operational activities. Look to Sage Software for fully integrated business management applications that deliver high performance, advanced functionality, cross-product integration, and unmatched freedom of choice.

Sage Software solutions support the specialty needs of a broad scope of industry segments, including manufacturing, distribution, construction, real estate, nonprofit, and professional services. Today, over 2.4 million North American customers run Sage Software solutions. Its parent company, The Sage Group plc (London: SGE.L), supports 4.5 million customers worldwide and has revenues exceeding \$1 billion. Together, with its network of business partners, Sage Software provides the ongoing support and service small and midsized businesses need to achieve tangible business results.

For more information, please visit the Web site at .

For more information, go to:  
[www.shelko.com](http://www.shelko.com)

Or contact your certified  
Sage CRM SalesLogix Business  
Partner.



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