Sage ERP X3 CRM

Used in association with the sales management function, the CRM module for Sage ERP X3 enables the user to improve management of customer relations. The marketing function can use it to organise 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 organise 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 areas of Sage ERP X3. Relationships can be managed with normal business partners (prospects, customers, suppliers, and more) 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 area of the 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 presales 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 coworkers, 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 team can benefit from the Sage ERP X3 CRM management tools, global visualisation 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 knowledgebase is available for service personnel to shorten the time it takes to find solutions to requests. An automatic assignment process quickly selects 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 centres and work queues, and service employee work statistics. Customer support can be initiated and managed either internally or by authorised 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 personalised. Some examples are:

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

Microsoft® Office Integration

The seamless integration of Sage ERP X3 with Microsoft Office allows users to manipulate Office documents (images, video, Excel®, or Word documents, and more) within the context of CRM operations. For example, mailings may be stored in the system database in Microsoft 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 synchronise tasks, calendars, meetings, and contacts from their local folder.

Features and Functions

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 I 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 rescheduling when necessary

Resource reservations

Appointment address search

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 Ι Queue Ι Personnel Ι Redirect to sales rep

Automatic control over the coverage of a request

Solution search in a problem/solution knowledgebase

Request report history

Semiautomatic 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

Knowledgebase

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, and more)

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