



## SAGE CRM SALESLOGIX

## CRM and Back-Office Integration

### CRM AND BACK-OFFICE INTEGRATION

Sage CRM SalesLogix is an integrated customer relationship management (CRM) suite that includes Sales, Marketing, Customer Service, Support, and Mobile 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
- Pricing
- Groups and Reports
- Orders and Quotes

The screenshot displays the Sage CRM SalesLogix interface for an account named 'Abbott Limited'. The top section shows contact details such as phone numbers, fax, and address. Below this is a 'Customer Information' section with fields for credit limit, on order amount, and various aging periods. At the bottom, there is a table with the following data:

Invoice Number	Invoice Date	Invoice Type	Bill To/Vendor Name	PO Number	Net Invoice	Sales Tax	Invoice Total
0000002513-IN	1/10/2006	Invoice	Abbott Limited		\$50,000.00	\$3,900.00	\$53,900.00
0000001212-IN	1/17/2006	Invoice	Abbott Limited		\$181,500.00	\$11,797.50	\$193,297.50
0000001444-IN	6/7/2006	Invoice	Abbott Limited		\$943,500.00	\$61,327.50	\$1,004,827.50
0000001100-IN	6/13/2006	Invoice	Abbott Limited		\$62,000.00	\$5,300.00	\$67,300.00
0000001165-IN	7/3/2006	Invoice	Abbott Limited		\$950,000.00	\$65,250.00	\$1,015,250.00
0000001200-IN	7/13/2006	Invoice	Abbott Limited		\$80,000.00	\$5,200.00	\$85,200.00
0000001102-IN	7/13/2006	Invoice	Abbott Limited		\$125,000.00	\$8,125.00	\$133,125.00
0000001101-IN	7/13/2006	Invoice	Abbott Limited		\$420,000.00	\$27,300.00	\$447,300.00
0000001105-IN	8/2/2006	Invoice	Abbott Limited	11438	\$170,000.00	\$11,050.00	\$181,050.00
0000001115-IN	8/2/2006	Invoice	Abbott Limited	23145	\$63,600.00	\$4,134.00	\$67,734.00
0000001345-IN	8/9/2006	Invoice	Abbott Limited		\$54,800.27	\$4,212.02	\$59,012.29
0000001456-IN	8/9/2006	Invoice	Abbott Limited		\$84,600.00	\$5,496.00	\$90,096.00

Sage CRM SalesLogix integration with back-office applications enables you to view critical information such as invoice history, 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 and your back-office accounting application provides your sales professionals access to the most current product information and pricing 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 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.
- Create a list of customers with past due balances.

#### Historical Invoices and Orders

- View invoice number, date, type, and vendor.
- Reference PO numbers, amounts, tax, and freight information.
- View a list of unprocessed orders.
- View order date, number, type, and ship-to information.

#### Payments/Receipts

- View check date, invoice number, check number, transaction amount, and status.
- Use Mail Merge capabilities to send account past due reminders.

#### Product Information

- View product name, part number, family, group and type.
- Access pricing, substitute products, units, and costs.
- Enable greater control over product pricing.

#### Quotes and Orders

- Generate accurate, complete quotes and orders and associate with customer record.

#### Cross-Sell/Up-Sell

- Plan cross-sell marketing campaigns using past product purchasing history.
- Announce new products and releases to existing customers.

### About Sage CRM SalesLogix

Sage CRM SalesLogix is the customer relationship management solution that enables small to midsized 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 midsized businesses, Sage CRM SalesLogix delivers integrated Sales, Marketing, Customer Service, Support, and Mobile 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 7,300 customers worldwide, is part of the Sage Software family of integrated business management solutions.

### About Sage Software

Sage Software supports the needs, challenges, and dreams of more than 2.6 million small and midsized customers in North America through easy-to-use, scalable, and customizable software and services. Our products support accounting, operations, customer relationship management, human resources, time tracking, merchant services, and the specialized needs of the construction, distribution, healthcare, manufacturing, nonprofit, and real estate industries. Sage Software is a subsidiary of The Sage Group plc, a leading international supplier of accounting and business management software solutions and related product and services for small to midsized businesses. Formed in 1981, Sage was floated on the London Stock Exchange in 1989 and the Group now has 5.0 million customers and employes over 10,500 people worldwide.

For more information, please visit the Web site at [www.sagesoftware.com/moreinfo](http://www.sagesoftware.com/moreinfo) or call **866-308-2378**.

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

Or contact your certified Sage CRM SalesLogix Business Partner. To find a Business Partner in your area, call **800-643-6400**.



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