



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 customer details such as address (4206 North Grand Avenue, Chicago, IL 60643 USA), phone numbers, and contact information. Below this is a 'Customer Information' section with fields for External Account, Master Record, and various financial metrics like Credit Limit (\$10,000,000.00) and On Order Amount (\$1,548,120.00). At the bottom, there is a table with 'More Tabs' including Invoice History, Open Invoices, Open Orders, Payments and Receipts, Notes/History, Contacts, Activities, Attachments, Opportunities, Associations, and Summary. The 'Invoice History' tab is active, showing a table of invoices with columns for Invoice Number, Invoice Date, Invoice Type, Bill To/Vendor Name, PO Number, Net Invoice, Sales Tax, and Invoice Total.

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		\$850,000.00	\$65,250.00	\$915,250.00
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	\$5,499.00	\$90,099.00

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.

