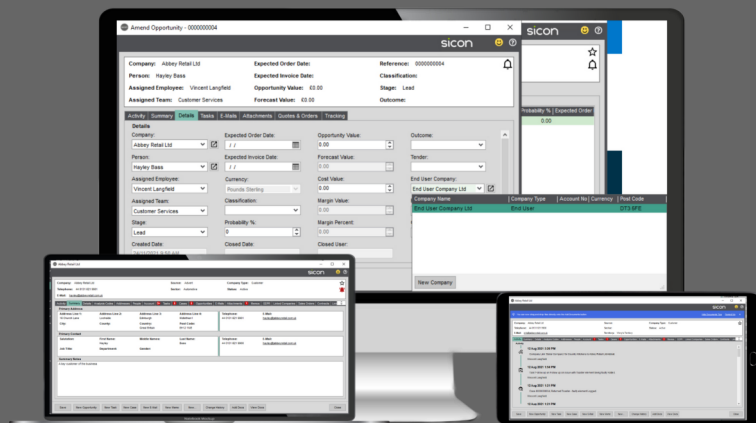




A CRM solution built entirely within Sage 200 providing company, contact, task, case, opportunity and reminders. plus a web portal creating a single data source, ensuring both Sage and non Sage users are always connected.



CRM for Sage 200

Key Product Functionality

- Migrate & link all existing Sage 200 customers, suppliers and contacts into CRM.
- Create Company and Contact records for prospects, engineers, admin contacts or prospective suppliers without creating sales or purchase ledger accounts in Sage 200.
- Option to create sales and purchase ledger accounts later and link the contact record details to them.
- Create additional contacts against sales and purchase accounts where the CRM users have no access to the Sage 200 ledgers.
- Create opportunities from Sage 200 quotes and track quotes through to orders with lost / won statistics.
- Manage Project based opportunities where multiple clients may request the same quote for a single project.
- Use CRM Contacts in Sicon Hire and Service Manager for end user details.
- Keep notes and actions completed or set task and reminders for yourself or other users on sales orders, purchase orders, stock item or other Sage 200 modules.
- A Sage 200 Desktop list provides a list of task, actions and reminders assigned to the user.
- Pop-up reminders are provided for tasks and notes with due dates & times.
- A Web Portal is provided for external sales personnel including access to accounts data and products/sales history plus client visit reports.
- Data security maintained between allocated sales staff and customer sales data via territory controls.
- Notification to salesperson of accounts that have falling sales activity based on configurable rules.
- Notification to sales people of reminders set for them in Sage 200 against orders and accounts.
- Notification of overdue activities.
- Filter contacts based on user definable criteria to produce e-marketing lists.
- Simple 'per named user' licensing for both Sage 200 and mobile users.
- Activity reports available for any user on all activities completed or scheduled to be complete.
- Reports available in Sage 200 report designer to allow simple amenability and new report creation.

Licensing Summary

Installed and maintained within Sage 200, using Sage 200 user licences with no Sicon specific user licences required.

Reports are designed within Sage 200 using the built in Sage 200 report designer, meaning they can be amended to provide custom versions of the reports.

Written within the Sage 200 development environment using the Sage business objects and utilising the latest Microsoft technologies for user interface.

When Sicon CRM is installed, the Sage features are updated and these can be added to the Sage user menu's using the Sage System Administration tools.

Requires a licence for the Sicon CRM module, plus named Sage 200 and external App users. For more information, please refer to our website for licencing and pricing.

Find out more....

To find out more about Sicon CRM, please contact your Sage Business Partner or contact Sicon direct on **01284 722850**.