Sage Accpac Extended Enterprise Suite

SageCRM for Finance:

Five Ways SageCRM Delivers Value to the Accounting Team

Your accounting department has big-picture goals—and everyday tasks. It's a balancing act that doesn't always balance out. SageCRM can help. It's a powerful customer relationship management system that is available with your Sage Accpac ERP software in the Sage Accpac Extended Enterprise Suite.

Together, SageCRM and Sage Accpac make your team members' jobs easier and goals more attainable—like no other solution out there. Take a look at five of the many ways SageCRM can bring value to your accounting team.

For more information

CALL 13 SAGE (Australia)
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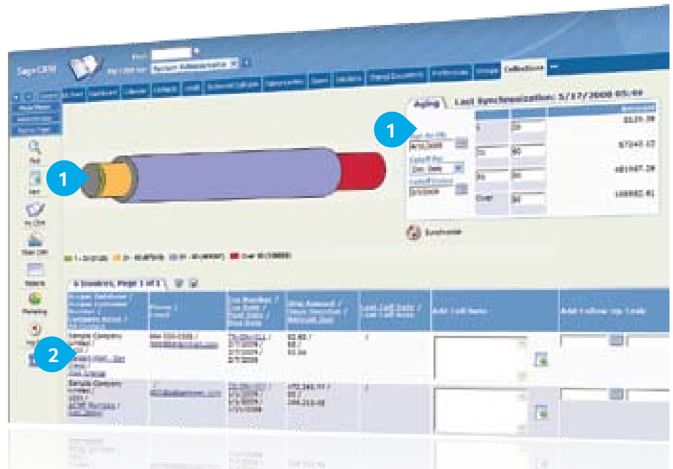
VISIT www.sagebusiness.com.au

1. Shorten AR time and have more cash available for your business.

In business, cash is oxygen. With the SageCRM AR cash collection system, you can prioritize and manage collections more proactively, efficiently—and successfully. Now you can get your cash off the AR books and into the business, faster.



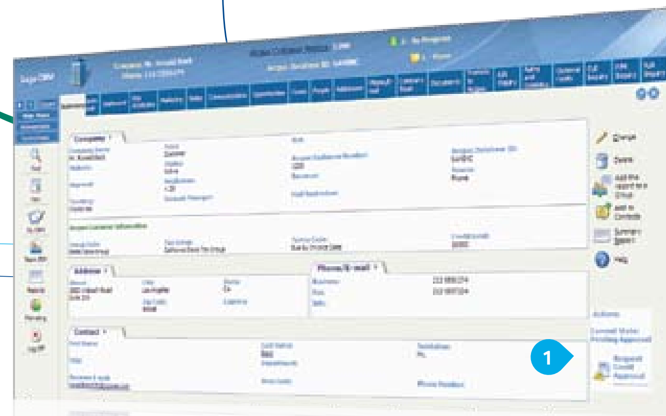
1–View receivables as a chart or table to quickly assess the big picture
2–Drill down to the invoice details without jumping to a new screen

SageCRM offers:	So your accounting team can:
AR Collections Manager	• Easily access all relevant information regarding each outstanding account in one location. • Stay on top of the AR collections process. • Eliminate steps in the collections process. • Prioritize follow-up collections calls. • Flag potential risks or trends early enough to be able to take corrective action.
Alerts and notifications	• Be proactive and send e-mails to both the customer and sales rep before the invoice is due. • Set automatic follow-up reminders as needed with customers and internal sales people to keep the collection process moving.
Back-office integration	• Allow front-line staff to enter invoices directly into the accounting system (if permitted). • Get the invoices out days earlier by removing the need to double-enter invoices. • Get the invoices out correctly the first time to avoid troubleshooting later.
Calendaring and task management	• Go beyond the printed aging report and use more sophisticated calendar tools to prioritize collection calls, make sure follow-up occurs, escalate accounts, send automatic e-mails, and more.
Centralized access to all customer contact and interaction information	• Be fully informed when talking to the customer, with all transaction and contact history ready and accessible. Avoid duplicating efforts already made by colleagues and sales people—and ensure customers aren't bothered twice.
Communication management	• Document collection communications (e-mail, phone calls, notes, letters) efficiently in one central location to maximize effectiveness and allow colleagues to easily pick up where the last person left off.

Example: A company bills about $10 million annually. Its average AR balance is $1 million—for a days sales outstanding (DSO) of 36.5. Collecting bills 10 days earlier allows the company to reduce the AR balance to $700,000 (reduction of $300,000). At an annual rate of 5% return on invested funds, this gives the company a $15,000 increase in profit. Alternatively, this cash can be used to reinvest in the business or pay down debt.

2. Speed up customer credit approvals.

Processing the paperwork involved in getting new customers approved for credit can be a time drain for both your sales people and your accounting team. SageCRM automates credit approval workflow so the accounting team doesn't have to chase paperwork, the sale can close faster and, again, you can shorten order-to-cash time.



1–Speed up customer credit approvals by having front-office staff initiate the process in one simple step

SageCRM offers:	So your accounting team can:
Workflow automation	• Give the sales team a button to push in SageCRM that will trigger the credit approval process for the customer. • Send out the application automatically. • Send and receive calendar tasks and reminders to responsible parties at each stage of the application. • Centralize information about the application so that Sales can check in on behalf of the customer.

Example: By shaving three days off each customer's credit application approval process, a company invoices and collects revenue three days earlier. With 100 new customers a year, that adds up to 300 more days of money in the bank, earning interest, or available to re-invest in the business.

3. Save hours on the phone with front-office staff.

Sales and customer service representatives need to know things like what the status of a customer refund is, how much credit a customer has left, whether a payment was received, and when an order was shipped. SageCRM provides a window into your Sage Accpac ERP system. You maintain control of who gets to see what information. The front-office staff get faster answers so they can serve customers better. And your accounting team saves valuable work hours.

1-Give front-office staff the ability to view order line-item details
2-Allow front-office staff to enter orders directly into Sage Accpac ERP from the SageCRM desktop

SageCRM offers:	So your accounting team can:
Back-office integration Centralized access to all customer contact and interaction information	• Give Sales and customer service representatives permission-based access to the transactional and contact information they need including payment history, credit status, order status, discounts.

Example: A company has a full-time AR clerk who used to spend an average of 30 minutes a day answering requests for customer account information from sales representatives. That time is now better spent getting invoices sent and paid on time.

4. Save hours on data entry and troubleshooting.

When sales orders have to be entered in two different systems by two sets of people, you waste time and introduce more possibilities for error. The Sage Accpac Extended Enterprise Suite can help you reduce redundant data entry so that you can get invoices out faster, get them right the first time, and shorten order-to-cash time.

SageCRM offers:	So your accounting team can:
Back-office integration	• Give Sales and customer service representatives permission to input orders and RMAs at the source and pass it to the accounting system, reducing the risk for data error and eliminating the need for duplicate data entry.
Centralized access to all customer contact and interaction information	• Have customer address and phone number changes entered by the front-line staff, to ensure the information is accurate and up-to-date and that invoices are sent to the correct place. • Troubleshoot discrepancies easily by researching all transactions and communications—not just the ones that are normally visible to accounting.

Example: A company has an AR clerk who handles invoicing and an accounting manager who handles collections. By reducing time spent on invoice data entry and reallocating some of the AR clerk's time to collections, the accounting manager is now able to focus more on strategic and analytical tasks—and collections are more timely and effective. As the company grows, it avoids adding staff. The value of the reallocated time is the cost of an additional part-time employee—about $20,000.

5. Streamline vendor management and save on purchasing.

It pays to take good care of the people you pay. SageCRM can help you track and access all vendor-related information in one system. Now it's easier than ever to stay on top of vendor discounts, keep track of special contract arrangements, and process purchasing requests and quotes.

SageCRM offers:	So your accounting team can:
Calendaring and task management	• Keep track of each step in the purchasing process and set tasks in the calendar to make sure they get done. • Set tasks and reminders to ensure timely payment by AP and take advantage of any early payment discounts.
Communication management	• Document and access all communications—phone calls, letters, e-mails, RFQs, and service level agreements—in one place, so issues can be resolved quickly. • Keep an airtight history of communications so that requests don't fall through the cracks and quotes don't get inadvertently revised by vendors.
Contact management	• Nurture relationships with vendors by scheduling "relationship building" calls. • Facilitate communication by keeping track of the key members of your vendor's team, such as the AR clerk, the account manager, accounts manager's boss, technical support, fulfillment.

Example: A company's IT manager requests 10 computers from the purchasing manager. From the moment he puts in the request, to the moment his staff are working on those computers—a month passes, 50 e-mails are written, four staff are involved, and a dozen documents are exchanged. By putting all those transactions in a centralized location, and using workflow and calendar tools to streamline every step of the process, the purchasing manager is able to pay the vendor early and get a discount. The IT manager knows exactly when his computers are arriving and doesn't waste a day of downtime.

FOR MORE INFORMATION

To learn more about how SageCRM and Sage Accpac Extended Enterprise Suite can work for your accounting department, please call your business partner or call us at 13 SAGE in Australia or 0800 904 409 in NZ.

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