



SAGE ACCPAC CRM

FOR

SAGE TIMBERLINE OFFICE



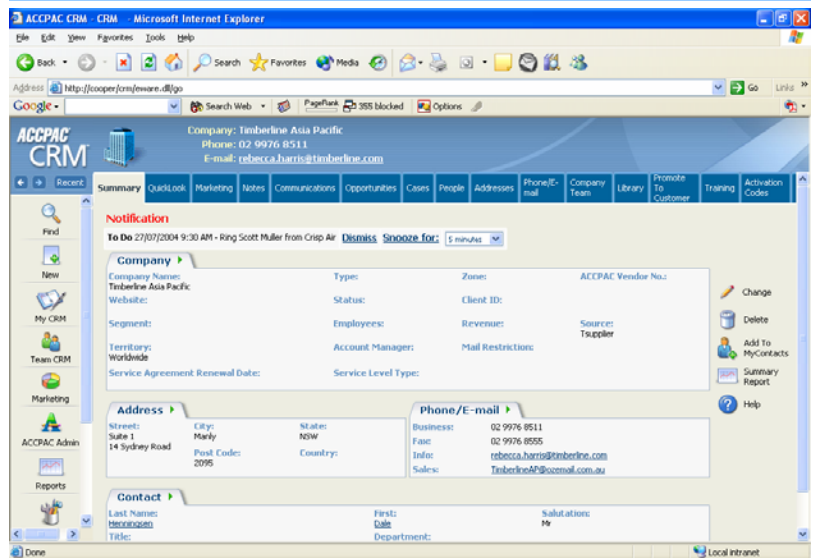
CONTACT RELATIONSHIP MANAGEMENT

Sage Accpac CRM™ provides your marketing, sales, project and customer service teams with the tools they need to find new customers, close sales faster, and build lasting, more profitable relationships across all channels.

With Sage Accpac CRM, you can:

- Empower your staff with enterprise-wide access to vital customer, partner and prospect information.
- Build long-lasting customer loyalty and generate repeat sales from your best customers.
- Integrate with Sage Timberline® Office for efficient access to customer, partner and transactional data.
- Analyze, forecast and report on key sales data.
- Assign, schedule and track marketing campaign activities, and measure the performance of every campaign.
- Identify, execute and replicate effective marketing initiatives across your sales channels.
- Access relevant customer data in real time, including purchases, call and escalation history, interactions, multiple contacts, support cases, e-mail and documents sent and received, and sales opportunities.
- And much more!

Experience the power of Sage Accpac CRM
Sign up today for a 30-day FREE trial.
<http://www.sageaccpac.com>.



Sage Accpac CRM offers instant integration between your front- and back-office systems.

Sage Accpac CRM™ is an award winning, wireless and Internet based CRM system that provides enterprise-wide access to vital customer, partner and prospect information—anytime, anywhere—and now it works with Sage Timberline® Office.

Sage Accpac CRM uses industry-leading technology to foster better business practices and effortless information exchange throughout your enterprise. With Sage Accpac CRM, you can quickly analyze, manage and synchronize sales, marketing and customer care activities across all points of contact. Regardless of how, when or where your customers, partners and prospects choose to interact with your company, Sage Accpac CRM gives you a decisive advantage by providing comprehensive, easy-to-use tools to successfully manage these relationships.

Sage Accpac CRM offers a full range of hosted or onsite deployment options, which means you get complete flexibility to run your business your way. As your business needs change, you can quickly and easily switch deployment environments (from hosted to on-premises deployment, or vice versa), and all your CRM customization and data move with you.

For companies that only need sales force automation, Sage Accpac CRM SalesTeam™ is the perfect answer, providing a robust and cost-effective sales force automation application that is built on the same underlying architecture used for Sage Accpac CRM.



"We were blown away by what we saw in the product demo. Sage Accpac CRM offered everything we were looking for ... We've been using it like crazy and loving it. We're getting an immediate ROI and realizing big productivity gains."

*Eric Robichaud, CEO
Mediaweave*



CUSTOMER RELATIONSHIP MANAGEMENT

Flexible, Adaptable CRM

Sage Accpac CRM offers unmatched flexibility and performance with advanced features, industry-leading technology and a robust architecture built to stand the test of time. It integrates seamlessly with industry-leading ACCPAC® business management applications, and also works with applications from other vendors.

Sage Accpac CRM includes:

Sales Force Automation – Sage Accpac CRM puts you in complete control of your sales pipeline, allowing sales teams to effectively manage, forecast and report on all phases of the sales cycle. With Sage Accpac CRM, you can easily manage and analyze all current and historical account details and activities, manage multiple accounts and opportunities and automatically distribute leads to sales professionals around the world.

Point-and-click reporting and graphs offer sales teams access to real-time data, for on-the-spot analysis and evaluation. By analyzing the information available, you can recruit new clients and resell to existing ones.

Marketing Automation – Sage Accpac CRM provides a single source of customer information to help you better manage your marketing efforts and make sound decisions based on the needs of your customers and prospects. With Sage Accpac CRM Marketing, you can target the right customer at the right time, eliminate guesswork and put your company's marketing resources to their best use. You can schedule and track marketing activities within a campaign – and view every detail of each campaign.

Customer Care Automation – With Sage Accpac CRM, you can make the most of every customer interaction, maximizing business opportunities and customer satisfaction. It empowers your organization with critical information to build and support long-term customer satisfaction and loyalty. With Sage Accpac CRM Customer Care, you can build and effectively manage lasting customer relationships by providing the professional level of service your customers expect. Sage Accpac CRM provides real-time access to relevant customer data including purchases, call and escalation history, interactions, multiple contacts, support cases, e-mail and documents sent and received, sales opportunities and more.

Web and Wireless Access

Access Sage Accpac CRM anytime, anywhere using a standard Web browser, cell phone or wireless PDA. Even when not connected to a network, mobile users can work offline and later synchronize with the central server, using the optional Solo Server.

Web Self Service

Sage Accpac CRM Web Self Service allows customers to access information or request services and support over the Web whenever they want. Customers receive information based on their preferences, requests and history through customized customer and partner portals.

Microsoft Outlook and Lotus Domino Integration

Sage Accpac CRM integrates with today's most popular e-mail and calendar management systems, such as Microsoft® Outlook® and IBM® Lotus® Domino™.

Automated Workflow

Integrating business rules across all channels, departments and employees is easy with Sage Accpac CRM automated workflows. In combination with e-mail integration, Sage Accpac CRM ensures that actions requiring attention or escalation are automatically routed to the appropriate employees or partners.

True Customizability

Sage Accpac CRM provides customization tools such as Enterprise Integration Server (EIS) to rapidly modify all aspects of the system. You can create functional components that query ODBC-compliant databases and third-party software and extend your Sage Accpac CRM system out to different devices. Its open architecture reduces development and maintenance costs and allows seamless integration with other applications.

Computer Telephony Integration (CTI)

Sage Accpac CRM CTI links your Sage Accpac CRM system to TAPI phone switches and expands upon some of the basic functions to optimize call centre efficiency and meet the needs of your particular call centre.

CRM TIMBERLINE INTEGRATION

Enabling's CRM Integration for Sage Timberline® Office gives access to all essential Sage Timberline information anywhere that CRM access is available. There are integration components available for Core modules (Accounts receivable, Accounts Payable and Address Book), Job Cost and Project Management, Purchasing and Inventory, Service Management, Property Management, Payroll, Equipment Cost. Additional components are available for Job Cost Forecasting and Time Sheet Entry.



The Sage Timberline Integration components automatically synchronize your Sage Timberline Office® information from Address Book, Payroll and Property Management seamlessly through to the Company and People tables in CRM. All contact information stored in Sage Timberline is automatically uploaded into the CRM database and then made available for easy tracking of all correspondence and the association of different correspondence with Projects, Equipment and Properties.

CRM presents data in similar formats to Sage Timberline's thick client software with improved drill-down in many areas. All on-screen lists and form designs can be modified to suit your companies needs via a simple customization interface that you can make available to selected users using CRM's advanced security system.

Views are available for all the modules in the Sage Timberline® Office suite and they all feature powerful communication and management tools provided by CRM. You simply choose which components you require.

Your AR customers for example, are accessible using CRM search functions. The CRM Integration can be customized to allow users to drill-down to view customer invoices and receipts via hyperlinks on customers' current

and aged account balances.

Another CRM feature, the management Dashboard, shows a customizable set of content relating to you, the user. You decide what data will be shown. For instance, it could include a list of your most recently viewed companies or color charts that give a snapshot view of key accounting data from Sage Timberline®.

The Sage Timberline integration components also provide facilities for securing your data. Job and Equipment records can be assigned to individuals and teams and these assignments can be used to secure which records can be seen and reported on by which operators.

Security for Sage Timberline information is controlled on a by module security matrix. Individual users can be excluded from specific types of information such as AP vendor invoices or AR customer Invoices and aging.

The CRM Integration components available are: **Core Modules (AR, AP & Address Book), Job Cost & Project Management, Purchasing and Inventory, Service Management, Property Management, Equipment Cost. Additional components are available for Job Cost**

ACCPAC CRM Company: Grocer's Association Phone: (503)987-5687

Recent Summary QuickLook Marketing Notes Communications Opportunities Cases People Addresses Phone/E-mail **Billings** Company Team Library

Find New My CRM Team CRM Marketing Job Info Reports Administration

Customer Summary

Total Billings: 889,064.30	Total Billings YTD: 889,064.30	Last Invoice Amount: 2,937.87	Last Invoice Date: 5/23/2001	Last Cash Receipt Amount: 200,000.00	Last Cash Receipt Date: 5/20/2001	Avg Outstanding Balance: 353,670.00
Average Days To Pay: 24	Highest Balance: 797,220.00	Last Aging Date: 5/31/2001				
Current Amount: 123,447.87	30 - 60 Days: 233,160.00	60 - 90 Days: 0.00	90 - 120 Days: 0.00	Retainage Balance: 88,906.43		

Customer Billings

12 Records Found, Page 1 of 2

Activity Type	Invoice	Invoice Date	Contract	Description	Amount	Job	Cost Code	Retention Held	Retention Billed
Cash receipt		28/02/2001	0100100	March Payment	-117,000.00	01-001		0.00	0.00
Cash receipt		31/03/2001	0100100	May Payment	-114,740.00	01-001		0.00	0.00
Cash receipt		30/04/2001	0100100	May Payment	-85,260.00	01-001		0.00	0.00
Cash receipt	010010000001	31/01/2001	0100100	March Payment	-50.00	01-001		0.00	0.00
Invoice	010010000001	31/01/2001	0100100	January Billing	29,500.00	01-001		-2,950.00	0.00
Cash receipt	010010000001	31/01/2001	0100100	Jan Payment	-26,500.00	01-001		0.00	0.00
Invoice	010010000002	28/02/2001	0100100	February Billing	130,000.00	01-001		-13,000.00	0.00
Cash receipt	010010000003	31/03/2001	0100100	April Payment	-100,000.00	01-001		0.00	0.00
Invoice	010010000003	31/03/2001	0100100	March Billing	238,600.00	01-001		-23,860.00	0.00
Invoice	010010000004	30/04/2001	0100100	April Billing	353,800.00	01-001		-35,380.00	0.00

The screen above is an example of some of the information which can be provided on the Customer Summary Screen

The following screenshots provide just a few more examples of how the CRM Integration can provide instant access to data stored in any of the modules across the Sage Timberline® Office suite.

Vendor invoices

CRM's powerful search capabilities make it a simple matter to view vendor invoices in a few clicks without even having to open up a separate AP module.

Simply enter the first few letters of the vendor's name in the Company Search field to view a list of all companies that fit your search criteria. From a table showing summary contact information, it's easy to find your vendor and bring up their complete record via a hyperlink.

Finally, just select the Vendor Invoices tab to view a complete list of the vendor's invoices. Select an invoice to view invoice summary information and distribution details in the same view.

Additional drill down is supplied via a hyperlink on the Amount Paid for each distribution to view payment details.

Job Information

The CRM Integration components for Job Cost allows you to simply select a Job from the Find Jobs function access to job data. As well as job summary information, additional tables in the same view present all the extras attached to the job.

Drill down functionality is provided via Hyperlinks on the Cost Codes so that users can access the details of transactions comprising Total Estimates, Revised Commitments and Job to Date Costs.

Property Management

The CRM Integration components for Property Management allows

Tenant information from Property Management to automatically synchronize into the CRM dataset making CRM the idea environment to follow-up outstanding charges and track maintenance issues.

Service Management

The CRM Integration components for Service Management provide direct access to Service Management Work orders and invoices from the company record.