

Improved productivity Stronger communications



When you integrate Sage CRM with Sage ERP X3, your business benefits from end-to-end visibility and a single view of the customer, where each department is working with the same information and communicating in the same way. The result is greater insight into business performance, more efficient processes, improved productivity, and more effective communications, all of which open up new opportunities for growth:

- **Use a single source for customer contacts.** Connect your sales, marketing teams, and customer service teams by organizing and consolidating your ERP and CRM customer information into one reliable source.
- **Increase visibility into your customers.** Sage CRM provides employees across departments the single source of information they need to answer any customer question. Using Sage CRM, you can easily gain visibility into areas such as customer call history, order status and quotes.
- **Eliminate duplicate data entry.** Increase efficiencies and eliminate errors by entering data once. For example, create new customers in Sage ERP X3 using the information already available in Sage CRM.
- **Maintain control and data integrity.** Keep data synchronized between Sage CRM and Sage ERP X3. Administrators define and control what each user can see or change within the ERP system and CRM—and what data is kept distinct versus shared between the two systems.
- **Streamline your processes.** Use Sage CRM to easily manage the required and unique activities for onboarding new customers and contact introductions. Customer updates are then available in both Sage CRM and Sage ERP X3.

X3 Quotes

Quote no. : QTENA0110009	Customer : NA009	Date : 18/03/2014
Reference : 032948	- tax : 8467.20	Tax included : 8467.20
Shipment site : NA011	Sales site : NA011	
Tax rule : NTX		

Change
Continue

Sub Items

Description	Product	Quote quantity	Gross price	Cost price	Line margin	Margin	Net price	Line amt -tax	Line amt +tax	Ship site
IPHONE 5	DI5013	12	720	0	8467.20	705.60	705.60	8467.20	8467.20	NA011

Quotes created in Sage CRM incorporate product information from Sage ERP X3. Then, new sales quotes are updated into Sage ERP X3 from Sage CRM.

Sage CRM and Sage ERP X3

Sell and deliver on your promises.

Create accurate quotes quickly. Gain more business with accurate quotes that you can provide quickly.

Better forecast customer demand. With Sage CRM and Sage ERP X3, you can more easily deliver on what you promise. Sales will be able to report on their near-term close activities so the purchasing department has the information they need to more accurately forecast and order inventory.

Place new orders with speed and confidence. Using Sage CRM, your sales team can place a new quote or order, and see a sale through to its completion. Sales or customer service team members can enter new orders or view orders by location, customer purchase history, or credit status—all without having to call someone or log onto another system. Know critical information before an order is placed.

Delight your customers with knowledgeable service.

Instantly resolve more customer inquiries. When Sage CRM is integrated with Sage ERP X3, each person across your business can access comprehensive and centralized customer information. Using Sage CRM, you can easily view real-time order status, past service call notes and credit status. When you repeatedly demonstrate how well-informed you are, your customers' trust and reliance on your business will only get stronger.

Provide more information through self-service. Sage CRM provides you tools to create your own company self-service web portal so that your customers or suppliers have quicker access to the information they need such as viewing their account profile, requesting a quote, or seeing a status on a service issue.

About Sage CRM

Sage CRM is designed to help businesses like yours. It is easy to use, adapt, configure, learn, and manage for companies that want to focus on their business, not on their software. And critically, it's affordable, offering you the best possible value. When integrating with Sage ERP X3, you can enjoy more business insights, greater efficiencies, and a single, customer-centric view across the entire business.

See why over 14,000 organizations worldwide use award-winning Sage CRM to make every business interaction count.

For more info, visit: na.sage.com/sage-crm
or contact us at 866-530-7243