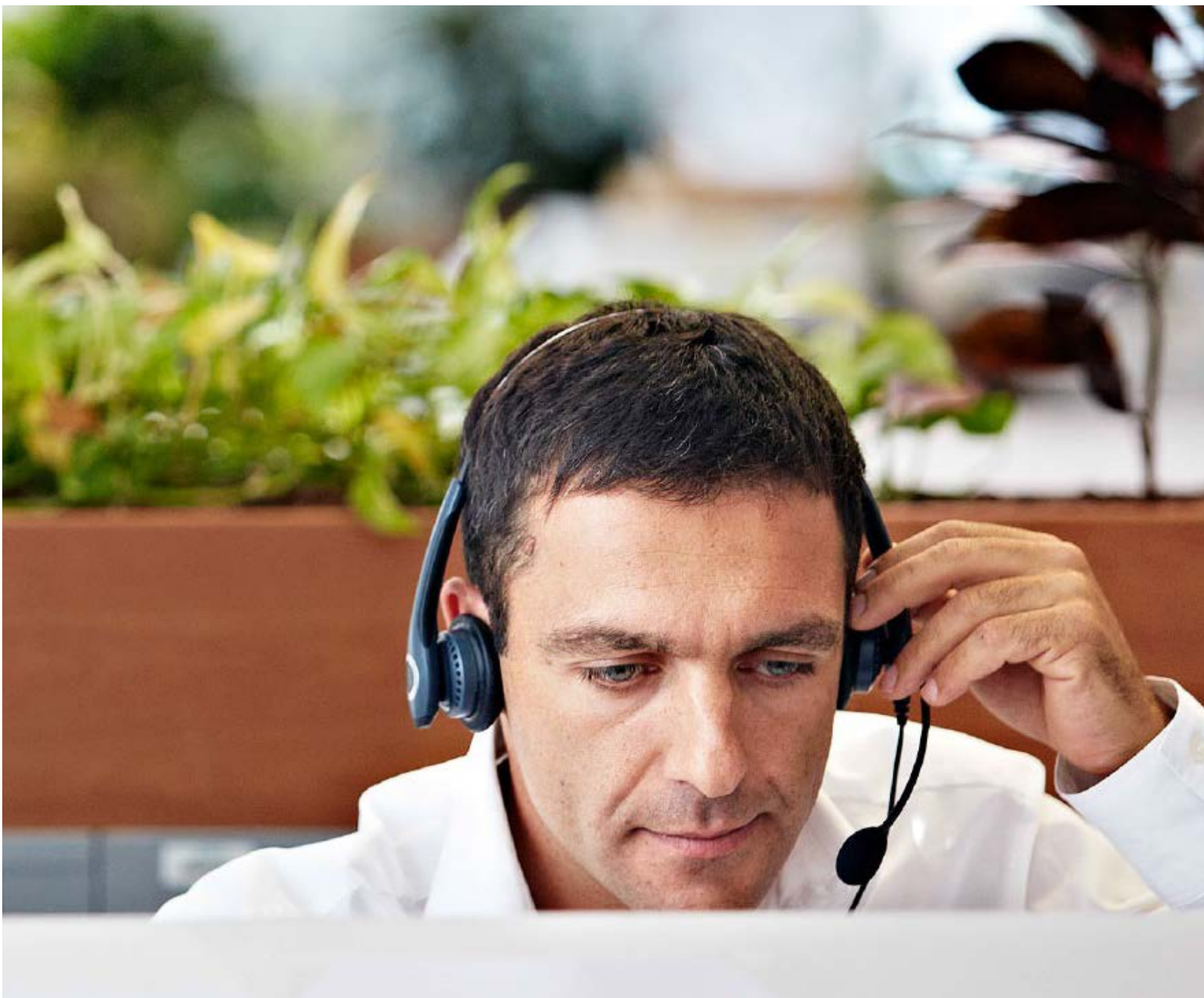


Sage ERP X3 Customer Service



877-496-5350
sales@goism.com
goism.com



Sage ERP X3

Customer Service

Sage ERP X3 Customer Service enables users to improve management of customer relations.

Used in association with the sales management function, Sage ERP X3 Customer Service is used to organize and monitor marketing campaigns, manage direct mailing and telemarketing, and set up trade shows and press campaigns. It is designed to be used by the sales force on a daily basis to monitor jobs and organize tasks including customer job monitoring, management of incoming and outgoing calls, tasks, meetings, and contacts. The sales support functions are linked directly to Sage ERP X3 sales features such as quotation management and sales order entry saving significant entry time and helping to create an error-free environment.

In addition, the customer service capabilities may be used for the management of equipment populations and customer service operations. Finished goods shipped on customer orders are automatically available to be serviced in the customer support area of Sage ERP X3 Customer Service.

A Flexible Database of Business Partners and Contacts

Sharing customer service data with other parts of your business is no problem with Sage ERP X3. Relationships can be managed with normal business partners (prospects, customers, suppliers, and more) or directly with independent contacts, with whom no relationship yet exists. Business partners may have an unlimited number of contacts, each of whom may play different roles, and contacts may be associated with several different business partners. A portal calendar within the customer service area of Sage ERP X3 provides easy visual access to events.

Sales Support

The sales support features can have significant benefits by providing a range of tools for managing customer relations and activities. Using a set of presales actions, your sales team can schedule appointments, log both inbound and outbound phone calls, assign critical tasks, check on late actions that need to be done by coworkers, and obtain an overall view of the activities on a particular prospect or customer. Sales opportunities can be registered and the key pre- and post-sales steps set up so that the entire sales process can be controlled up to the creation of a sales quote, which can be tied directly to the opportunity defined in Sage ERP X3. Sales objectives can be defined so that management can easily determine sales performance (actual revenue versus forecast) by sales rep and/or other important criteria.

Marketing Campaigns

Your marketing team can benefit from the Sage ERP X3 Customer Service management tools, global visualization screens, and functional control over marketing campaigns. Marketing managers can easily follow the activities that are in progress and can quickly compare their projected costs to the overall campaign budget. The customer service functionality can also assist your team in the creation of direct mail, email and phone campaigns as well as record media and trade show events.

Sage ERP X3 Customer Service

Customer Support

Sage ERP X3 Customer Service provides your team with the ability to manage the customer base after the sale is made by tracking service contracts and information about units installed at customer sites. From this set of data, service requests can be processed for fault diagnosis, repair, and advice. Responsibility and control are established by the service contracts, which specify the terms and conditions of the warranties and maintenance agreements, and the level of service to be delivered. A dynamic service knowledgebase is available for service personnel to shorten the time it takes to find solutions to requests. An automatic assignment process quickly selects the most qualified employees for a particular service problem.

A service workbench is available to view all service requests in the queue (in process or late), responses pending, status of service centers and work queues, and service employee work statistics. Customer support can be initiated and managed either internally or by authorized customer personnel.

Management Reports

The customer service functionality within Sage ERP X3 provides a set of summary reports, created using SAP Crystal Reports® that supports activities in three main areas—marketing, sales, and service. All reports can be easily personalized. Available reports include activity analysis by sales rep, sales opportunity analysis, late service requests, expiring contract listing, and effect of marketing activities.

Microsoft® Office Integration

The seamless integration with Microsoft Office allows users to manipulate Office documents within the context of customer service operations. For example, mailings may be stored in the system database in Microsoft Word format as part of marketing campaign data.

For a detailed listing of customer service functionality available with Sage ERP X3 please reference the Sage ERP X3 Solution-In-Detail.

About The Sage Group plc

We provide small and medium-sized organizations with a range of easy-to-use, secure, and efficient business management software and services—from accounting and payroll to enterprise resource planning, customer relationship management, and payments. Our customers receive continuous advice and support through our global network of local experts to help them solve their business problems, giving them the confidence to achieve their business ambitions. Formed in 1981, Sage was floated on the London Stock Exchange in 1989 and entered the FTSE 100 in 1999. Sage has over 6 million customers and more than 12,700 employees in 24 countries covering the UK & Ireland, mainland Europe, North America, South Africa, Australia, Asia, and Brazil.

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