

Sage 300 ERP

Vertical Industries



Service, Financial, and Insurance Industries

Whether your business is in the service, financial, or insurance industry, you'll find the right solution in Sage 300 ERP (formerly Sage ERP Accpac).

Sage 300 ERP for Service-Based Businesses

Sage provides a completely integrated suite of applications to streamline your service and support processes at virtually any touchpoint. As the owner or manager of a service-based business, you know that the key to success is a streamlined and efficient call center that presents all the information quickly to your staff when they need it. And this information must flow throughout the business, from the call center to the technicians on the road and ultimately to the customer.

Sage 300 ERP for Financial Institutions

Sage CRM, part of the Sage 300 ERP solution, provides a complete solution for sales, marketing, and customer service for banking, institutional finance, wealth management, capital, and brokerage firms. In a world of decreasing commission revenues and no-fee self-serve transactions, financial institutions must understand and manage their customers' portfolios better in order to deliver a service that warrants solid return.

Core Financial Modules

Sage 300 ERP is renowned for its rock-solid financials and reporting. The transactional analysis capability of all modules gives you more in-depth costing information in the general ledger. Your chief financial officer (CFO) will be able to keep a concise general ledger with up to ten levels of analysis, including comprehensive information on additional cost centers or responsibility centers for dynamic reporting. Easily manage global commerce across multiple companies or subsidiaries. No matter where you do business, Sage 300 ERP helps you maximize your international insight and exchange information worldwide.

BENEFITS

- Rock-solid financials, reporting, and business intelligence. The transactional analysis capability of all modules gives you more in-depth costing information in the general ledger.
- A holistic view of all customer interactions from call logs to dispute resolution.
- Full job tracking and planning of resources and subcontractors.
- Integrated call center with escalations and alert management.
- Web and wireless access to information anywhere, anytime.
- Full capability for mobile sales force and mobile technicians, allowing them to receive and process jobs in the field.
- Award-winning integrated e-marketing solution for effective marketing communications.

The screenshot displays the Sage CRM Interactive Dashboard. At the top, it shows the 'Sage CRM' logo and 'Interactive Dashboard' title. Below this is a navigation bar with tabs for 'Recent', 'Dashboard', 'Calendar', 'Contacts', 'Leads', 'Opportunities', 'Forecasts', 'Cases', 'Shared Documents', 'Preferences', 'Groups', 'My Twitter', and 'E-marketing User Profile'. The main content area is divided into several sections:

- Companies by Type:** A table with columns for 'Company Name', 'Account Manager', and 'Type'. It lists various companies like 'A&W Services', 'Abyssinian', 'Accounting', etc.
- Company Cases:** A bar chart showing 'Company Name' on the x-axis and values on the y-axis (0.00 to 20.00). Companies include '3G Homes', 'A Midland & S...', 'A&W Services', etc.
- Opportunities by Sales...:** A bar chart showing 'Assigned To' on the x-axis and 'Forecast (\$)' on the y-axis (0.00 to 5.00M). Salespeople listed include 'System Administrator', 'William Dolan', 'Matthew Edden', etc.
- Company Contacts:** A table with columns for 'Last Name', 'Person', 'Title', and 'Phone'. It lists contacts like 'Allen Zack All...', 'Anderson Yauken...', 'Andrews Janet A...', etc.
- Quick View Items:** A section with two icons labeled 'Opportunity' and 'Marketing'.
- Sage CRM Ecosystem:** A section titled 'Sage CRM Community' with a link to 'www.SageCRM.com' and a 'User Community' link.

● Sage CRM helps you communicate, collaborate, and compete.



"It is easy to use and has all of the functionality our properties need. And thanks to its multiple language overlays and multicurrency features, it works in every country in which we operate."

David Beeby
Director of Financial Systems
FRHI

Small Investment. Big Return. Peace of Mind.

Discover the Sage 300 ERP technology difference! Get one unified solution on which to build your business—enabling more efficient processing, more productive people, and the ability to gain real insight into your business. Sage 300 ERP ensures your business is built on a solid foundation, providing superior architecture that gives you the power you need today with the flexibility to adapt tomorrow. Reap the rewards of a global reach solution with the breadth of functionality to support multitenancy and multinational organizations with the local touch needed for your business. Your newfound freedom of choice is supported by a collaborative ecosystem, ensuring success for the life of your business. And of course, with over 30 years of supporting businesses just like yours, Sage technology is proven, reliable, and experienced.

Sage 300 ERP for Service Industries

As your business looks for cost-effective ways to satisfy customer demands and increase the bottom line, Sage 300 ERP provides a highly adaptable solution that allows you to accelerate growth. Sage 300 ERP enables you to envision—and achieve—success with the ability to expand the number of locations and services you provide to effectively meet customer expectations. You'll also improve productivity and keep your costs low with a comprehensive business management solution that is available anytime, anywhere and supports multiple technologies, databases, and operating systems. Benefit from flexible functionality that helps in contracting, job cost management, preventative maintenance, equipment servicing, office automation, telecommunications, or any significant service industry, including:

- A complete suite of modules that enables service companies to manage and integrate all customer communications, embracing all channels of communication.
- Quote management tracking and policy management with automated workflows.
- Improved risk assessment through better management, storage, and access of information by the business units.
- Effective management of labor scheduling, parts and stock availability, job profitability, RMAs, site equipment records, and your customer relationships.
- Ability to create service-level agreements, warranty, and meter agreements, including preventative maintenance to monitor and support your customers.
- Capabilities that allow your employees to modify and create jobs over the Internet using the Employee Portal or let your customers save you time and money by logging jobs and viewing information over the Customer Portal in a self-service process.
- Better management, better control, better information . . . better profitability and service!

Sage 300 ERP for Financial Institutions

To stay competitive in today's global economy, you need more than simple financial accountability and compliance. Financial-based businesses all depend on real-time visibility, collaboration, agility, and most of all compliance in order to achieve success. Benefit from functionality that allows you to:

- Focus on improving customer care through workflow and tasks managed by Service Level Agreements.
- Eliminate information silos caused by disparate systems and get a holistic view of the company, allowing you to integrate with legacy operational systems to get a consolidated history of your customer.
- Analyze data for cross-sell and up-sell opportunities while delivering better service and improved productivity through coordination of products and resources.
- Attract and retain customers as well as extend services into existing customer relationships.

Sage 300 ERP for the Insurance Industry

Most insurance industries need to consolidate data from back-office systems that may include claims management, policy management, and application management with Optical Character Recognition (OCR) and document management capabilities. Benefit from functionality that allows you to accomplish these goals, so you can:

- Provide your employees, agents, and customer service representatives with a holistic view of your customers' portfolios.
- Create better service, up-sell, and cross-sell opportunities.
- Create targeted marketing campaigns and activities through key attribute profiling.
- Complete document management and OCR capabilities for storing all documents, such as insurance and ID certificates.
- Use Sage CRM to streamline sale channels, including brokers, agents, call centers, and employees with a self-service portal.