



What's New in Sage CRM v7.3

September 17, 2015

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What's New in Sage CRM v7.3
Connections Webinar – September 17, 2015

Agenda

➤ “What’s New with Sage CRM v7.3”

- New contemporary interface
- Significant improvements to iPhone & Android Mobile
- Mail Chimp marketing

➤ “What’s New with DM2 Sage CRM”

- Recap of DM2 CRM-ERP integration
- DM2 pricing in Sage CRM quote/order entry via Greytrix
- DM2 industry vertical CRM Masters offering:
 - Templates as a starting point:
 - Alternative screen/workflow templates
 - Location management
 - Streamlining of screens and workflows
 - More intuitive & user friendly to encourage user adoption
 - Screens designed for iPad, Microsoft Surface
- Advanced marketing
- Development of a CRM integrated online credit application
- CRM user adoption

➤ Advanced Business Intelligence

- Why is CRM vital for sales people & management?

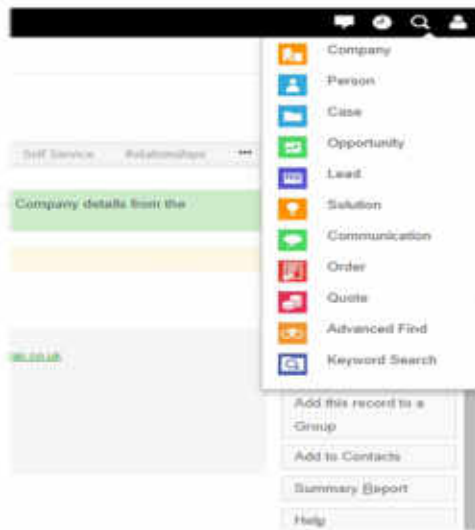


Agenda

- “What’s New with Sage CRM v7.3”
 - New contemporary interface
 - Significant improvements to iPhone & Android Mobile
 - Mail Chimp marketing



Main User Changes in Sage CRM 7.3



A new contemporary
user interface
(Theme)



Improved mobile
experience for customers
Including iPhone app and
new Android app



Additional
Mail Chimp
Integration

Agenda

👉 “What’s New with DM2 Sage CRM”

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Sage CRM in Microsoft Surface

Easy Online Meetings With | CRM - Dashboard | CRM - Sage CRM

dm2.com:3456/crmdm2/CustomPages/dm2/sql.asp?SID=193445859118395&Key0=1&Key1=137

11 Notifications

Sage CRM  **Company: Jafco**
Phone: 714 6266953
E-mail: PaulineMSmith@trashymail.com

Recent

Main Menu

Administration

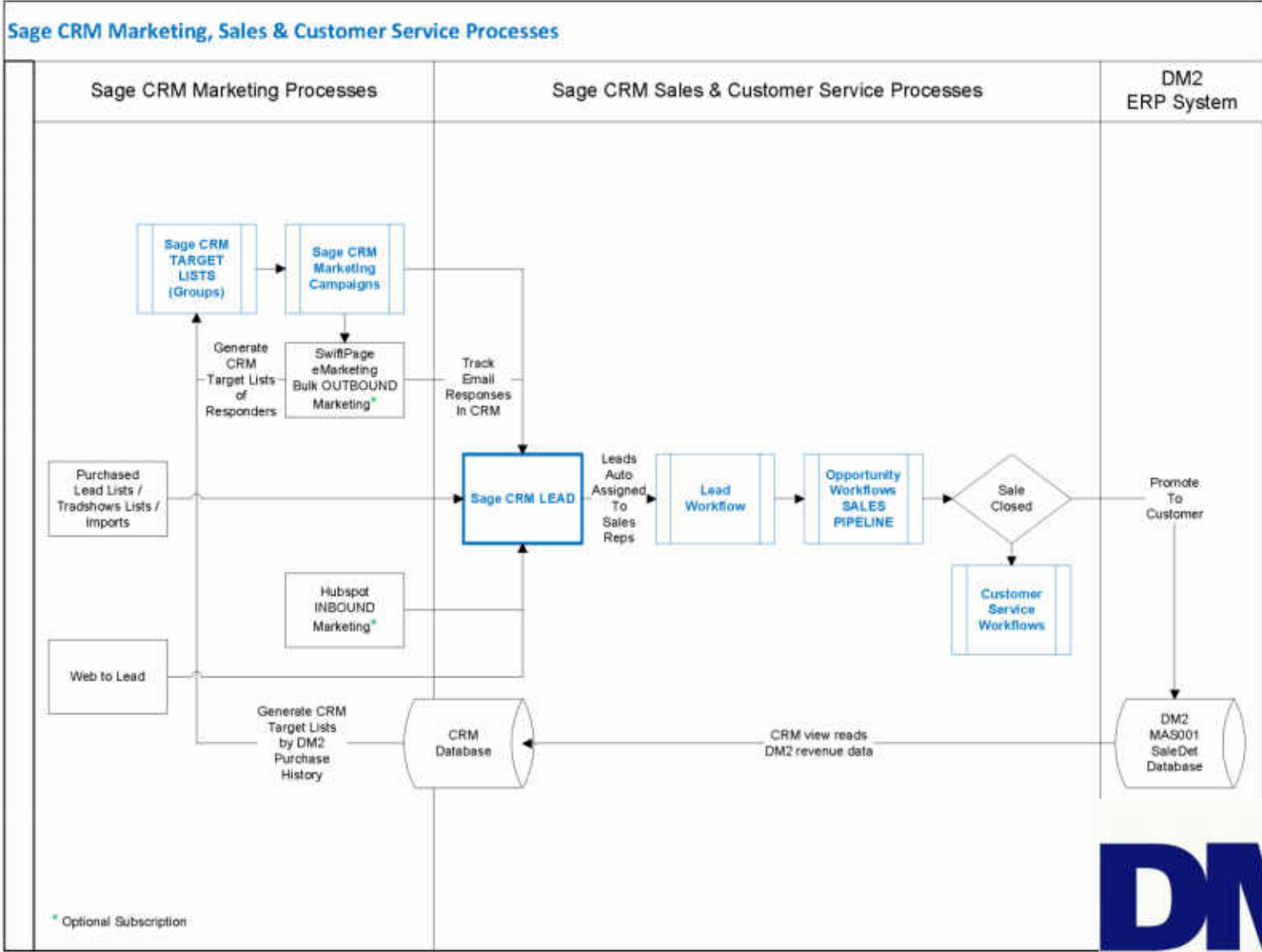
- Find
- New
- My CRM
- Team CRM

Business Line Sales

Jafco

	2007 Gallons	2007 GM	2008 Gallons	2008 GM	2009 Gallons	2009 GM	2010 Gallons	2010 GM	2011 Gallons	2011 GM	Difference Gallons	Difference GM
1001 - Plus Unleaded												
January	0	0	0	0	0	0	27,991	(51)	32,990	299	4,999	350
February	0	0	0	0	1,998	140	26,981	1,889	53,971	1,768	26,990	(121)
March	0	0	0	0	9,498	(460)	35,985	509	52,469	2,788	16,484	2,279
April	0	0	0	0	27,991	(171)	26,486	849	45,979	1,328	19,493	479
May	0	0	0	0	21,983	1,539	53,971	1,648	22,983	1,729	(30,988)	81
June	0	0	0	0	47,977	1,348	64,975	408	44,977	1,018	(19,998)	610
July	0	0	0	0	26,992	(121)	57,969	2,048	59,978	(62)	2,009	(2,110)
August	0	0	0	0	25,980	1,819	90,955	2,107	73,968	918	(16,987)	(1,189)
September	0	0	0	0	30,485	1,249	65,963	2,847	90,942	4,356	24,979	1,509
October	0	0	0	0	5,996	540	59,475	1,268	118,950	2,296	59,475	1,028
November	0	0	0	0	3,997	280	44,967	3,268	102,959	1,057	57,992	(2,211)
December	0	0	999	70	5,998	420	49,976	1,488	77,941	5,576	27,965	4,088
1001 - Plus	0	0	999	70	208,895	6,583	605,694	18,278	778,107	23,071	172,413	4,793

Marketing Potential From ERP Integration



DM2 Pricing in CRM

- DM2 Pricing to soon be available in DM2 Sage CRM including iPad, Microsoft Surface
- DM2 Pricing Levels
 - Type 0 Pricing – Pricing is setup by Price Code which are assigned to customers
 - Type 1 Pricing – Pricing is setup at Item level
 - Type 2 Pricing – Pricing is setup at customer level (by item)
 - Type 9 Pricing – Account special pricing is setup for customer / item
 - Contract Pricing – Pricing pulled from customer contracts
 - Family Pricing – Multiple items assigned to same family group get combined to meet quantity breaks
 - Rebates – Item / Customer has a rebate setup – no impact on price just included to make sure the flag was set correctly
 - STD Cost % – item price is setup as a % over standard cost
 - STD Cost AMT – Item price is setup as an amount over standard cost
 - STD Price % – price is setup as a % over standard price
 - STD Price AMT – price is setup as an amount over standard price
 - Fuel Tax Exempt – no impact on price, impacts fuel taxes that are added to the order

DM2 Quotes & Orders in Surface

Easy Online Meetings With | CRM - Dashboard | Order

dm2.com:3456/crmdm2/eware.dll/Do?SID=193445859118395&Act=523&Mode=1&CLk=T&Fran

11 Notifications

Sage CRM

Orders: ORD-464/3: Persons: Raymond Silver
 Opportunity: Auto : Phone: 315 3868861
 Company: Town and Country Convenience E-mail: RalphEEklund@spambob.com

Recent

Main Menu

Administration

Find

New

My CRM

Team CRM

Reports

Marketing

Log Off

Order Summary

Currency: USD Pricing List: MAS90 Pricing Order type: Standard Order Created by: Susan Maye Include In Quotes Total: Sales Order Number:

Order Date: 09/15/2015 Delivery Date: Opened: 09/14/2015 10:55 PM

Billing Address: 3472 Oak Street, Abilene TX 79601 USA Shipping Address: Town and Country Convenience, 5 change it a third time, ABILENE TX 79601 USA Residential Address: Warehouse: Tankwagon 3

Ship Via: TRUCK B03 Terms Code: Net 3 days Tax Schedule: TX Harris County-Houston FOB: Status: Active

Contact: [Raymond Silver](#) 315 3868861 PO Reference: Comments: Batch Fax:

Salesperson: Curtis Brooke Print Orders: Print Pick Sheets: Batch Fax:

Payment Type: Check

Check Number: Deposit: USD 0.0000 Document Type: Order

Freight: USD 0.0000 Sales Tax Amount: USD 4.1481 Order Total: USD 54.4281 Amount Subject to Discount: USD 0.0000

Line Items

Line #	Product Code	Product Name	UOM	Quantity	Back Order Quantity	List Price (USD)	Discounted Unit Price (USD)	Quoted Price Sum (USD)	Warehouse
1	150370032000812	RED BLOPLO AW 32 BULK	BULK	1.0000	0	13.9300	13.9300	13.9300	Tankwagon 1
2		DRUMDEP DRUM DEPOSIT	Each	1.0000	0	25.0000	25.0000	25.0000	Tankwagon 3
3		JEENVFEE Compliance Fee	Each	0.0000	0	11.3500	11.3500	11.3500	
TOTALS								USD 0.0000	USD 58.2800

Continue

Change Summary

Credit History

Calculate DM2 Price

Promote Order

New line item

Quick Line Entry

New Free Text item

New Comment line item

Clone

Start Mail Merge

Help

Review - What Exactly is CRM?



- Marketing
- Sales
- Customer Service
 - Customer Create Process
 - Support, Cases, Issues
 - Customer Rebill
 - Tank Set process
- Integration Platform
 - ERP integration
 - iPad/Surface Order Entry
- Web Portal

The CRM Cycle

Marketing

- General Leads
- Target Lists “Groups”
- Marketing Campaigns
- Advanced Marketing

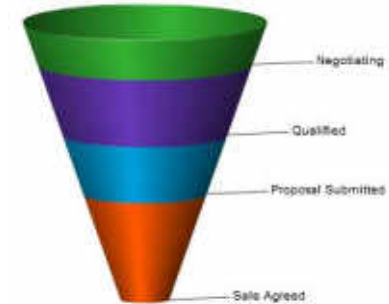


Business Intelligence

- Reporting
- Dashboards
- Advanced BI

The Sales Process

- Sales Pipeline
- Leads & Opportunities
- Quotes & Orders
- Close the Sale



Order Entry

- DM2 Pricing
- iPad
- Surface



Customer Service / Support

- Create/Manage Customers
- Any “Post-Sale” Process
- Cases & Projects
- Customer Retention



Marketing



- Basic Marketing
 - Target Lists “Groups”, Marketing Campaigns, Outbound Calling, Drip Marketing
- Advanced Marketing
 - Mail Chimp (Built-In with Sage CRM 7.3)
 - Outbound email & response tracking
 - Reports & automated notifications of responses
 - Internet Communicator
 - Web Tracking
 - Twitter Auto-Response
 - Richer Customer Profile – Connect the Dots
 - Inbound Marketing
- Advanced Target Marketing & Notifications



Sales Force Automation



- **Lead Workflow**
 - Leads imported/entered & assigned
 - Leads qualified & promoted to opportunity
 - Leads closed/disqualified
- **Opportunity Workflow**
 - Sales process/pipeline
 - Quotes & Orders in CRM
- **New Customer Create Process**
 - Credit application workflow
 - Promote to Customer
- **Build Prospect/Customer Profiles**



Sage CRM Mobile Options:

- Sage CRM for iPad & Microsoft Surface
 - *Full CRM-ERP Integration*
 - *DM2 Data Tab*
 - *MAS Quotes & Orders with “DM2 Pricing”*
 - *Server-side screens, workflows, reports*
- Significantly improved Sage CRM 7.3 Mobile iPhone/Android



Sage CRM 7.3 in Surface

The screenshot displays the Sage CRM 7.3 interface on a tablet. The browser's address bar shows the URL: `dm273.cloudapp.net/crm/eware.dll/Do?SID=95741965552233&Act=6001&Mode=1&Clk=T&cor`. The Sage CRM navigation menu is open, showing options like Dashboard, Calendar, Contacts, Leads, Opportunities, Forecasts, Cases, Shared Documents, Groups, and Configure. The main content area displays three panels:

- My Open Opportunities:** A list of deals with columns for Status, Deal Name, and Action. The status is consistently 'In Progress'.
- Contacts:** A list of contact records with columns for Last Name, Person, and Company Name.
- Opportunity Status:** A horizontal bar chart showing the distribution of deals across different stages.

Stage	Count
Deal Lost	1
Negotiating	1
Qualified	2
Proposal Submitted	3
Sale Agreed	2

Last Name	Person	Company Name
Allen	Zack Allen	California Telese...
Anderson	Yaukena Anderson	Circus Beverage...
Andrews	Janet Andrews	Magnetic Softwar...
Annala	Wilmer Annala	City Qualified Su...
Antjes	William Antjes	Cross Medical B...
Ball	Arnold Ball	The Software For...
Barrow	Reg Barrow	Design Right Inc.
Beading	Wayne Beading	Freightliner & Arr...
Berger	Wayne Berger	Geosystems Ter...

Customer Service



- New Customer Setup Process
- Any “Post-Sale” Process
- Manage “Cases”
 - Complaints, billing questions
 - Equipment installation
 - Wrong product delivered
 - Oil spill
 - Leak test
 - Tank Set workflow
 - Resolve pricing errors
- Customer Web Self-Service Portal

Customer Service Workflows

Sage CRM

Company: Larry Binstein
Phone: 406 8622077

Recent Summary QuickLook Marketing Notes Communications Opportunities Cases

Main Menu

Administration

- My CRM
- Find
- New**
- Team CRM
- Reports
- Marketing

New

- Company
- Person
- New Solution
- Tank Set**
- New Opportunity
- New Lead
- Order
- Quote

Actions

Company

Company Name: Larry Binstein
A.I.C.A.:

Type: Customer
Industry:

Customer Type:

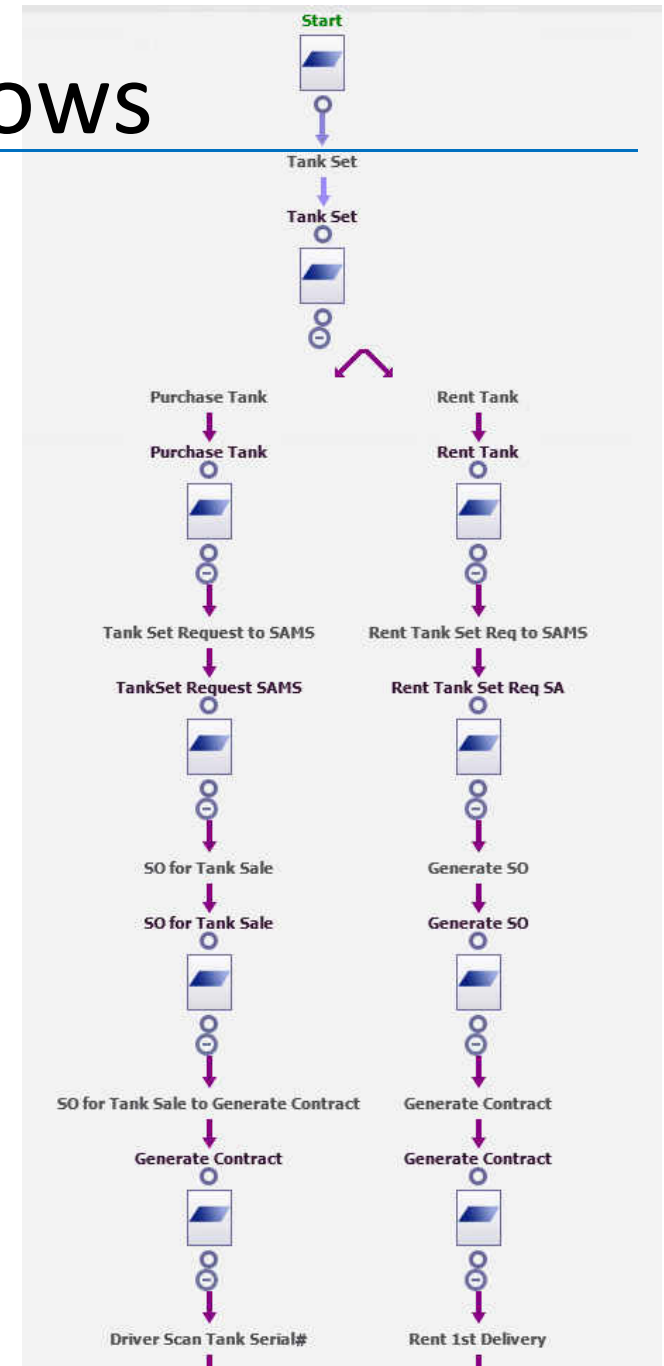
Company Code: CSV

City: Whitefish
State: MT
Zip Code: 59937
Country: USA

Last Name:

Area Code:

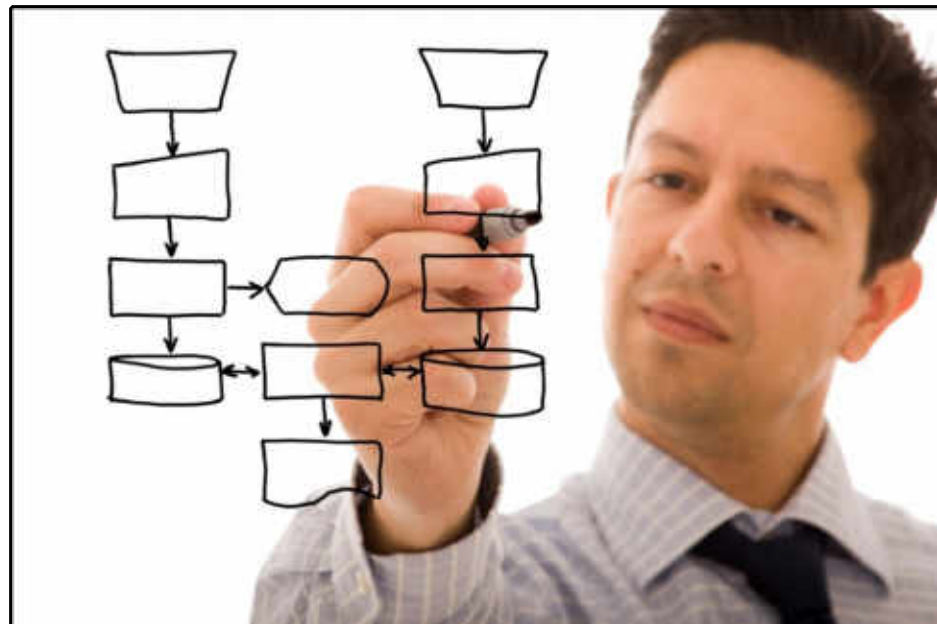
You are using an unregistered version of Sage CRM



Sage CRM Workflows

Predefined Processes

- LEAD Workflow
- OPPORTUNITY Workflows
- CASE Workflows
- COMPANY Workflows
- Notifications



Agenda

- Advanced Business Intelligence
 - Why is CRM vital for sales people & management?



Join DM2 for a summary of what's taken place throughout FY2014/2105

DM2 Software invites you to attend our *"Year in Review"* webinar on October 15, 2015 at 11:30am Pacific Time/2:30pm Eastern Time. With our fiscal year coming to an end September 30, 2015, we thought it would be a good opportunity to look back and provide you with a recap of what's taken place in FY2014/2015. We will also give you a glimpse at our roadmap for the future. Join us for a review of our :

v2013 Releases

New Partnerships

New Programs

Year-end Prep. Tips

The Road Ahead...

We will also be debuting our new Support portal that will give you the ability to enter and track your support cases on-line!

Space is limited, so register today!

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Connections Webinar – September 17, 2015

Year in Review



Register Now





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Follow-up questions?
E-mail DM2 at: sales@dm2.com

