

Sage Offers Cross-Platform Solutions for Crossroads

CPS is a sales and service group of companies based in Ontario, Canada, that includes Control Panel Systems and Complete Packaging Systems. CPS maintains both an outside sales force and an inside team of customer service professionals who support them. Prior to the implementation of Sage CRM and Sage 300 ERP,* CPS endured widespread inefficiencies due to a lack of integration between its various databases. To remain competitive, the company realized it needed a better way to track its sales processes.

Disconnected Sales Databases Impede Progress

The highly inefficient fashion in which sales were tracked significantly threatened the growth of the company. For example, the CPS outside sales staff had no way to download the sales information contained in their PDAs into a centralized database that could be made accessible to inside staff. Instead, data had to be rekeyed into a separate database in order to generate weekly and monthly reports. In addition, a lack of database integration meant that staff had to use a word processor to create quotes and, when a quote turned into an actual order, had to rekey the information into the company's accounting system.

"We had a real mishmash of different programs, which really hindered our efficiency and accuracy," says Dave Beetham, general manager at CPS. "We were using a contact management program for our customer database, another database for our financial and accounting processes, Microsoft Excel® spreadsheets for other functions, and none of them were linked. Due to this lack of database integration, we had no way to access real-time data about our sales process. This meant that management couldn't effectively track our sales force and customer base."

Comprehensive, Integrated CRM

To resolve its database inadequacies, CPS turned to Sage business partner INDUS SYSTEMS, which recommended that the company integrate its existing Sage 300 ERP accounting system with Sage CRM, a complete customer relationship management solution. After viewing a demo of Sage CRM, CPS became convinced that it was the perfect solution.

*Sage 300 ERP was named Sage ERP Accpac when CPS initially implemented this solution. The product names have been updated in this case study to reflect current naming.

Customer

CPS

Industry

Sales/Service/Integration

Location

Ontario, Canada

System

Sage 300 ERP

Sage CRM



Challenge

A mishmash of programs to track customer data, deliver quotes, and create orders hindered CPS's efficiency and accuracy, while a lack of effective tracking hampered sales processes.

Solution

Sage CRM, a web-based CRM solution, integrates with Sage 300 ERP and Microsoft® Outlook so outside sales staff can share information with management, accounting, and inside sales.

Results

Data entry is reduced, sales quotes and orders are easier to produce, and outside sales reps have instant access to critical sales information.

“Sage CRM enables CPS sales representatives to ‘hot sync’ their PDAs each night and export their contact data and notes directly into CRM via Microsoft Outlook,” says Amer Mustafa, vice president of IT solutions at INDUS SYSTEMS. “They can create appointments in Sage CRM, send them to Microsoft Outlook, and then access their data from the PDAs. After their appointments, they can reverse the process back to Sage CRM.”

In addition, internal sales staff can create quotes in the Sage 300 ERP Order Entry module and then simply click a button to link to Sage CRM and convert quotes into orders. INDUS also customized the system to enable CPS staff to create new items quickly in the Sage 300 ERP Inventory Control module.

Instant Access to Critical Sales Data

With the new system, all CPS contacts, as well as notes and appointments from PDAs, reside in a centralized database. “Recording information from sales representatives directly into the system eliminates redundant data entry needed for weekly and monthly management reports,” says Beetham. “We no longer have to wait for reports because we can access this data whenever we want. Also, I can check everybody’s schedule at any time.

“Since we already had a relationship with Sage and confidence in Sage 300 ERP, it just made sense to complete our solution with Sage CRM. The implementation and its smooth integration has paid tremendous dividends for CPS. As we look to the future, we know that Sage offers the flexibility to integrate with other systems later, while keeping the price down today. Our belief in Sage and its products continues to grow as our business evolves.”

“Sage 300 ERP is to be saluted for the design of the system, which provides so much flexibility and has enabled us to conduct our business much more efficiently than before.”

Dave Beetham
General Manager
CPS

About Sage

Sage North America is part of The Sage Group plc, a leading global supplier of business management software and services. At Sage, we live and breathe business every day. We are passionate about helping our customers achieve their ambitions. Our range of business software and services is continually evolving as we innovate to answer our customers’ needs. Our solutions support accounting, operations, customer relationship management, human resources, time tracking, merchant services, and the specialized needs of the construction, distribution, manufacturing, nonprofit, and real estate industries. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs 12,300 people and supports more than 6 million customers worldwide. For more information, please visit the website at www.SageNorthAmerica.com or call 866-996-7243. Follow Sage North America on Facebook at: <http://www.facebook.com/SageNorthAmerica> and Twitter at: <http://twitter.com/#!/sagenamerica>.