DAPL Accounting Systems Inc.

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SageCRM Newsletter

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Taking SageCRM on the Road

Salespeople are often away from the office … visiting with customers, meeting with prospects, or attending events to build their referral network. As an organization that relies on the power of SageCRM, it's important to enable your sales personnel to access important CRM data while on the road. That's where **SageCRM Mobile Access** can play an important role. Let's take a closer look.

Taking SageCRM On the Go with Mobile Access

SageCRM Mobile Access delivers the entire application directly to your mobile device. It isn't a watered down version with limited functions - it's a **full-featured** version of SageCRM with real-time access to the live database. That means your salespeople have access to the most up-to-date information along with the full range of functionality they'd have if they were sitting in front of a computer in the office. Say, for instance, a salesperson is visiting one of your top customers and they'd like an update on an issue that your Customer Care team is working on. The salesperson would simply access the customer record from a PDA, review detailed account notes, and share the status with your customer onsite. Now that's service! No callback, no follow up reminders, and no delays.

With SageCRM Mobile Access you can:

- Update customer and prospect information onsite to improve data accuracy.
- Review your SageCRM Dashboard for a snapshot of leads and sales opportunities.
- Schedule activities, appointments, reminders, and follow up tasks.
- Perform any other CRM activity you'd otherwise access from a desktop PC or laptop in the office.

Setting Things Up

Each user must be configured for mobile access and your System Administrator would set up URLs for accessing SageCRM. Once that's done, you simply enter the appropriate URL into your BlackBerry, PDA, or mobile phone, enter your user name and password (of course it's secure!), and you're ready to go. It's very simple and there's no additional software to install on your mobile device.

Take advantage of SageCRM Remote Access today and be sure to contact us if you need assistance.

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DID YOU KNOW?

Did you know that Sage Software posts pre-recorded demos of SageCRM online? Whether you're interested in learning about new features of Version 6.1 or want to provide a new employee with a quick overview, pre-recorded demos are available anytime on demand. Here are a few topics:

- SageCRM - What's New in Version 6.1?
- What is CRM?
- Introduction to SageCRM for Sage Accpac ERP Customers

LOOKING TO THE FUTURE OF SAGECRM

Sage Software recently published a white paper that discusses their vision for the future of Sage CRM Solutions. Entitled "Sage CRM Solutions 2010 Strategy," it identifies specific, tangible opportunities for you to maximize the value of your CRM application. Let's explore a few highlights of the white paper.

Collaboration Across Departments

A unique differentiator for Sage is strength in both contact management (with ACT! - a market leader) ***and*** CRM. Based on research and feedback from a diverse customer base, Sage has discovered that simple contact management is sufficient in one department while full-featured CRM is critical in another. CRM 2010 will drive interoperability between ACT! and SageCRM to enable:

- Users in separate departments to use different products, yet interact through synchronized or shared databases.
- A seamless transition from ACT! to SageCRM without requiring a migration of data.

For example, a professional services firm wants its client managers to have the latitude to work independently using ACT!. However, in this same firm, the Marketing department may plan and execute a marketing campaign in which they need to understand the individual interactions with the customers and the buying patterns. In this case, it would apply SageCRM for the Marketing team without making the client managers change its proven model using ACT!

Leverage Technology and Web 2.0

The evolution of CRM will be influenced by the emergence of Web 2.0. - a widely-used term to describe the evolution of the internet from a simple browsing tool to an interactive and collaborative platform (videos, blogs, social networking, etc.). Sage will leverage Web 2.0 technologies to enable capabilities such as payment services, collaborative meetings online, and maps & driving directions delivered via text message to a mobile device.

Connected Front and Back Office

With several million ERP customers, Sage realizes that the wealth of transactional data in the back office must be easily accessible to CRM users without leaving the familiar environment of their CRM software. SageCRM will be increasingly optimized to expose salespeople to back office data to ensure accurate quotes, discounts, pricing, and product availability when dealing with a customer or prospect.

Sage CRM Solutions

2010 Strategy

Email Us to request the complete white paper.

Perfect Questions to Keep Your Prospects Engaged

Sales and marketing author Geoffrey James posted a blog recently that offers a handful of fantastic open-ended questions to keep your prospects engaged, keep conversations flowing, and establish rapport with questions that say "tell me more about that." Here are a few of them:

1. What did you mean when you said ________?
2. Why is that important (essential/relevant)?
3. What are some examples of ________?
4. What's your definition of ________?
5. Can you elaborate on ________?
6. What does _________ mean for you?

For details about using these questions effectively, click here to check out the blog in its entirety.

DAVE BEATH | (519) 823-0976 | info@dapl.ca

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CONTACT US ...

17A-218 Silvercreek Parkway N., Suite 205 | Guelph, ON N1H 8E8 | www.dapl.ca | info@dapl.ca