

How to Maintain customer loyalty and trust during times of uncertainty?

# CRM Means EVERYTHING

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# CONTENTS:

- What is Sage CRM and why you need it?.....03
  - What Sage CRM does to your sales teams?.....03
  - What Sage CRM does to your Marketing teams?.....04
  - Deliver great customer service!.....04
- Linking your Construction system with CRM-*should I do it? Does it matter?*...05
  - Sales Opportunity Pipeline.....05
  - Contacts.....05
  - Client Project Tracking.....05
  - Communications.....05
  - Cases.....05
  - Accounts Links.....05
- Benefits from linking Construction Management system and Sage CRM.....06
  - What is qnect 200 and what it gives you?.....07
  - Key Benefits for your business.....08

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*Qmulus' open and flexible approach to application development, coupled with their credible experience of delivering other customer solutions has helped us to unlock the potential of our core CRM investment. ~David Robson, Computacenter*



## What Sage CRM does to your Sales teams?

Sage CRM provides you with the tools you need to sell more effectively. It is an easy-to-use application that provides sales people with instant access to diaries, accounts, reports, pipelines, contacts, and call lists - in short, everything they need to get their job done. For your organisation, all this information is rolled up, tracked and reported on, giving continuous, meaningful and accurate reports on just how your sales team is performing.

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*Increase your productivity with Sage CRM*

## WHAT IS SAGE CRM AND WHY YOU NEED IT?

CRM is the abbreviation for customer relationship management. It entails all aspects of interaction that a company has with its customer, whether it is sales or service-related. While the phrase customer relationship management is most commonly used to describe a business-customer relationship, CRM systems are used in the same way to manage business contacts, clients, contract wins and sales leads.

One of the biggest benefits most realise when deploying CRM, comes from having all your business data accessed from a single location. Before CRM systems, customer data was spread out over office productivity suite documents, email, mobile phones and even paper notes. Storing all your critical data from all departments in a central location gives staff immediate access to the most recent information as and when they need it.

Many aspects of CRM relies heavily on technology; however the strategies and processes of a good CRM system will collect, manage and link information about the customer with the goal of letting you market and sell services effectively.

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## sage CRM

### What Sage CRM does to your Marketing teams?

Sage CRM provides powerful tools for managing, tracking and analysing targeted marketing campaigns. It is an easy-to-use application that provides marketing users with tools to target the right customer at the right time, eliminate guesswork and put your marketing resources to their best use. You can easily assign, schedule and track marketing activities and view every detail of each campaign at a glance.

With Sage CRM, you can view your campaign status at any time and successfully evaluate return on investment (ROI). Using sophisticated, user-friendly tools and reports, you can analyse marketing campaigns by lead sources or evaluate other important campaign details. Sage CRM not only tracks response rates, it also lets you match sales revenues to specific campaigns, providing immediate cost vs. sales analysis data. You can view activities, objectives, leads generated and lead followup. It's easy to drill down to specific activities within a campaign including communications, opportunities, responses, budget, actual cost and lists of prospects.



### Deliver great Customer Service!

Sage CRM gives your customer service staff the tools they need to develop real, lasting and beneficial relationships with customers. There is no better example of a department where the right technology and approach can transform a cost to the business into a potential profit centre than in customer service. With this in mind, Sage CRM was built to deliver key functionality with a low cost of ownership and easy to use tools that allow you to put service excellence at the heart of your business.

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# Boost your business GROWTH

*Due to the increased visibility and control, our Wholesale business operates more smoothly. That means we have empowered our teams who work faster, smarter and better irrespectively to the changes in the inventory or customer demands.*

*We have decided to switch from old-school spreadsheet-based inventory management to the modern and more efficient Sage solution.*

# LINKING YOUR CONSTRUCTION SYSTEM WITH CRM

SHOULD I DO IT? DOES IT MATTER?

by Andy Lindop

While Construction companies have traditionally invested in software systems for estimating, job costing and project management it is unusual to find Construction companies that actively link their CRM (Customer Relationship Management) system to their Construction ERP system.

With the advent of the Covid19 pandemic and the recent lockdowns, Construction companies have had to re-think and focus on more effective ways at looking at their Sales Pipeline and Sales tracking and how to provide a view on the progress and performance of their active jobs and projects.

Many companies will also want to make this critically important data much more visible to Project Managers and other interested parties and in most cases this must now be available across the internet so people can access it remotely. There is no doubt that a CRM system will have an immediate impact on any business, not just construction companies. CRM will make it so much easier for a business to win more sales and control long-term sales opportunities, however CRM can offer so much more to a construction specific company that may not be initially obvious.

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## DECISIONS

### Sales Opportunity Pipeline

See what quotations you have in progress and/or bidding on Workflow your quotation / sales process through to winning the project. Schedule diary events and call backs into Outlook

### Contacts

Create multiple contacts for each of your prospects and clients. Who do I need to email / speak to and what is their position / function?

### Client Project Tracking

When you have eventually won the project, see details about each project:-Budget, Actual and Committed Costs, Sales Revenue, current and estimated profit and Retention values. If your CRM is a web-based system, this means that people working remotely can access project details without being in the office.

### Communications

Track emails / phone calls / diary events in CRM / Outlook for each client / contact / sales opportunity.

### Cases

Use the CRM "case" functionality to log project defects / remedial work or issues

### Accounts Links

Most CRM systems will link to your accounts software, this means that in CRM a user could see when the customer was last invoiced, what the outstanding balance is, check the credit limit, are they on stop?

Benefits from linking

# CONSTRUCTION MANAGEMENT SYSTEM AND SAGE CRM



The above are just a few functions that most CRM system will have. In summary, linking your CRM system to your ERP system for Construction specific companies is becoming the norm and should feature as an important part of your business growth and procedures.

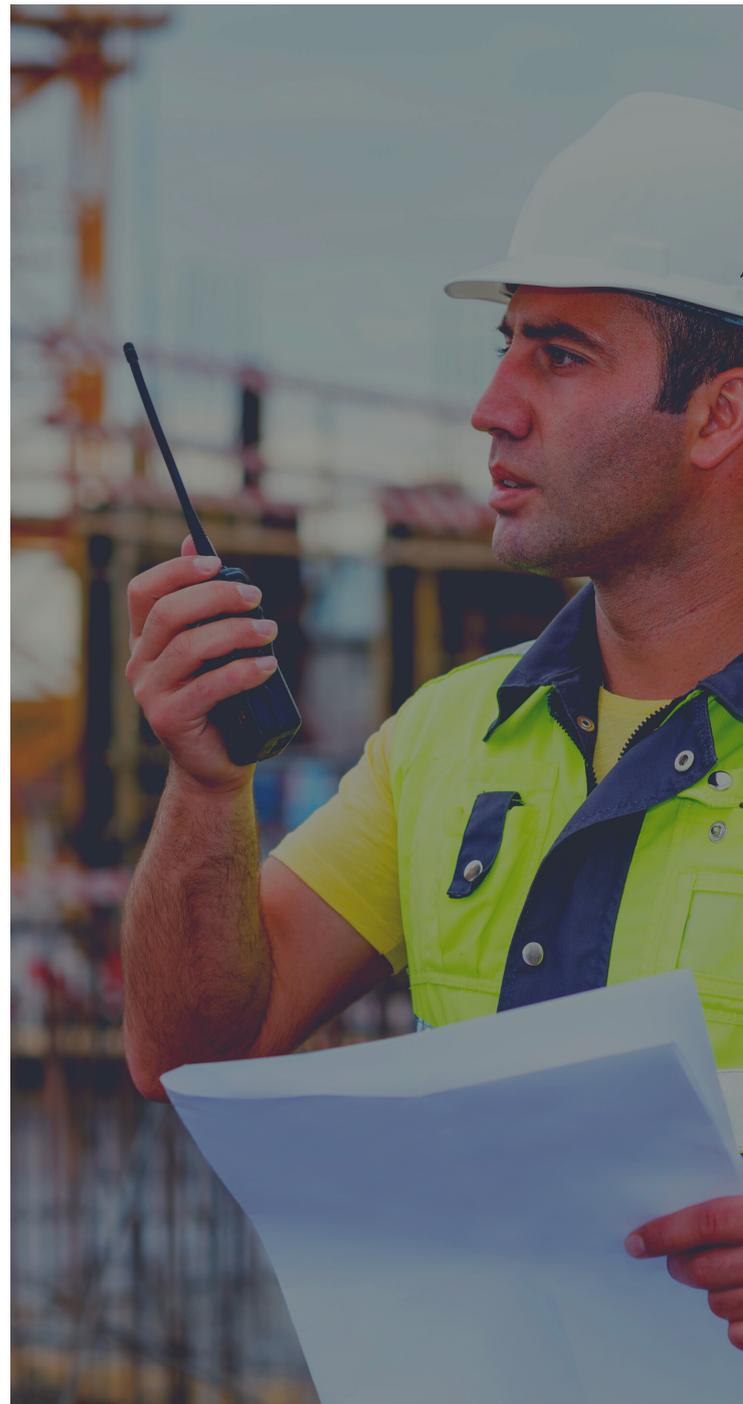
If you are looking to increase your success in the bidding process and your sales pipeline and workflow, CRM is a must!

At Qmulus Solutions, we provide Eque2 Construction for Sage 200 and Sage 50 ERP solutions. We also provide Sage CRM and an off the shelf and tested integration module between Eque2 Construct and CRM.

**Ask for a free consultation with one of our Construct / CRM experts and find out how you can maximise your sales potential and your business procedures.**

Arrange a Free 30-days Demo:

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*Most organisations want to grow, but aren't certain how to go about growing.*

*Whether it's something that seems simple, like increasing productivity, or something that seems complex, like expanding into new geographies, adding new product lines, or acquiring a company, Sage 200 solutions can be a significant driver of growth.*

Empower your  
**BUSINESS**

*Greater visibility, control, and efficiency*

## WHAT IS QNECT 200 AND WHAT IT GIVES YOU?

**Do your sales reps struggle to obtain a single view of customers? Do sales people need direct access to Sage 200 to be able to product quotes and orders?**

Qnect 200 for Sage CRM is a realtime integration that links Sage CRM to Sage 200. It helps to increase efficiency and accuracy in the management of customers/suppliers, products and quotes/orders at an affordable cost.

Sage CRM is a browser based CRM solution from Sage that allows you to manage any business interaction with your prospects, customers or suppliers that do not need to reside within an accounts system. This can include storing details about phone calls, emails or meetings. As well as managing sales pipeline, opportunities, quotes and orders. Additionally, Sage CRM can be used to record and manage customer issues and marketing activities such as MailChimp campaigns, outbound calling and importing of event leads which can all be easily performed from within the easy to use interface.

By combining Sage CRM with Sage 200 (using Qnect 200) you can enjoy better business insight, greater efficiencies, increased productivity and have a single customer-centric view across your entire business.

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# KEY BENEFITS FOR YOUR BUSINESS

## Quote and Sales Order processing

As products and prices are synchronised from Sage 200 into Sage CRM the Sage CRM inbuilt quote functionality is fully available to users via a web browser. Users can add products, free text items and comments to quotes, produce PDF documents and easily send these to the prospect/customer all from within Sage CRM.

Sage CRM prospect companies do not need to be linked to Sage 200 to produce quotes. This reduces the amount of data within Sage 200 by eliminating the need to have prospect customers and quotes in Sage 200.

Only actual sales customers and transactions will be in Sage 200 reducing the volume of data and load on the software speeding up Sage 200 due to the reduction in non-transactional data.

Orders for customers can either be created from quotes or entered straight into Sage CRM. As with quotes, orders can have PDF documents create against them which can be easily sent to the customer. When the customer has agreed to a quote, an order can be posted straight into Sage 200 against the customers Sage 200 account by simply clicking the 'Post to Sage Accounts' button when viewing the order.

**Provide the tools required to build targeted campaigns based on customer and financial information resulting on higher marketing ROI.**

## Decisions

Sage CRM helps you make strategic decisions about your business. You can identify and categorise your most profitable customers, understand their priorities and how much they cost you to sell to and to keep. CRM allows your staff to share vital customer information and handle complex processes by automating them. This improves effectiveness and ensures nothing is overlooked when dealing with customers or prospects.

Information entered at the start of the sales process flows through Sage CRM and into Sage 200 without the need to duplication data entry. This both reducing time and the possibility of data issues caused by entering the same data into multiple systems manually.

### Qnect 200 key features include:

- Multiple Sage 200 trading companies
- Instant Sage 200 Customer creation
- Customer and Supplier synchronisation
- Quote/Order using Sage 200 products
- Real-time Account views
- Real-time Sales Order views
- Real-time Sales Returns views
- Sage 200 Customer price enquiries
- View live stock availability for products
- Product level tax and warehouse selection
- Post CRM orders to Sage 200

## It has never been this easy!

If you think that it's time for your business to take this huge step toward more sophisticated business management and want to learn more how our Sage 200 and Sage CRM integration solution will enhance your business growth, take the next step: Request a Consultation with our Experts!

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