Sage CRM Cloud
Connected to Sage 100 ERP and Sage 300 ERP
Customer Pilot Program

The pilot program is designed to provide the opportunity for a select group of customers to gain early access to the solution who will provide feedback based on their use of the product to help guide the development process.

Program Overview:
- Limited to first 75 customers only
- Duration will be 90+ Days
- No charge for unlimited users of Sage CRM Cloud for the duration of the program
  - Standard pricing $45 / user / month
- $299 Activation fee
  - Includes account setup, Connector setup, user creation, validate data flow from Sage 100 ERP or Sage 300 ERP to Sage CRM Cloud

Pilot Candidate Benefits
- Opportunity to shape the future of the product offering through direct interaction with Sage team
- Prove direct feedback by completing surveys during the pilot phase
- Exclusive product educational programs for participants designed to get you up and running faster

Candidate Requirements
- Sage 100 ERP On-Premise Version [2013 PU5, 2014 PU2, or Higher] Installed
- Sage 300 ERP On-Premise Version [2012 PU4, 2014 PU2, or Higher] Installed
- Active Sage Business Care Plan
- Not currently using Sage CRM Cloud

If you would like to participate in this pilot program, please contact chris.ashby@sage.com

Product Overview:
When you integrate Sage CRM with Sage 100 or Sage 300 ERP, your entire business benefits from end-to-end visibility and a single view of the customer, where each department works with the same information and communicates in the same way. The result is greater insight into business performance, processes that are more efficient, improved productivity, and more effective communications, all of which open up new opportunities for growth:

Get up and running quickly and share your existing customer, contact and invoice information from your Sage 100 ERP or Sage 300 ERP system with easy to use and affordably integrated Sage CRM Cloud.

- Use a single source for all business contacts. Improve collaboration and efficiencies across your company by organizing and consolidating ERP and CRM contact information—prospects, customers, and partners—into one reliable source.
- Increase customer visibility. Whenever any employee interacts with a customer, Sage CRM provides the information he or she needs to answer customer questions. Using Sage CRM Cloud, you can easily see the customer's call history, order status, unresolved customer cases, invoices and more.
- Eliminate duplicate data entry. Increase efficiencies and eliminate errors by entering in data once. For example, you can update customer information in Sage 300 ERP, and it will automatically update the customer's information within Sage CRM Cloud.
- Maintain control and data integrity. System administrators define and control what each user can see within Sage CRM Cloud.
- Your ERP remains the "owner" of accounting records with data being sent one way from Sage 100 ERP and Sage 300 ERP.

Sage ERP to Sage CRM Cloud Integration

Data available within Sage CRM Cloud	New to Sage CRM Cloud
Connecting ERP to CRM • Customer Account Number • 2 years detailed invoice history • Last Invoice Date • Payment Terms • Credit Limit (Used) • Credit Hold • Sales (MTD, QTD, YTD, PY) • Most Popular Product & Quantity YTD	The following is new in Sage CRM Cloud: • Recommended call lists • Sales performance graphs • In product live chat

NOTE: The product contains all existing functionality available within Sage CRM Cloud.