

### Sage CRM Customer Care

Sage CRM Customer Care is designed to help you effectively manage and resolve issues efficiently by providing you with an easy to use user-interface and powerful feature set. This intuitive interface allows you to easily view information about your customers and resolve their issues effortlessly by employing the escalation features of Customer Care.

The screenshot displays the Sage CRM Customer Care interface. At the top, there is a navigation bar with tabs for Recent, Quick Start, Dashboard, Calendar, Contacts, Opportunities, Cases, Solutions, Shared Documents, Preferences, and Groups. A search bar and a dropdown menu for 'My CRM for: Kylie Ward' are also present.

A central notification box states: "All of the Cases assigned to you are listed on this tab. The SLA status column on this list is very important when managing your workload - Red means an SLA breach, Amber is a warning, and Green is still on target." It includes a bullet point: "Use the New Case action button to create new cases, or select a Case to review its details."

Below the notification is a 3D bar chart showing the distribution of cases across stages: Logged (14), Queued (8), Investigating (9), Waiting (1), and Solved (4). A text label indicates "9 Items in Stage Investigating".

The main content area features a table titled "9 Cases, Page 1 of 1" with the following columns: Status, RefId, Severity, Fix in, Person, Description, Assigned To, Stage, Territory, and SLA Status. The table lists 9 cases, all assigned to Kylie Ward and in the Investigating stage.

On the right side of the interface, there are filter controls for Status (set to In Progress), Stage (set to Investigating), Severity (set to --All--), and Territory (set to --All--). There are also buttons for "New Case" and "Help".

Status	RefId	Severity	Fix in	Person	Description	Assigned To	Stage	Territory	SLA Status
🟢	S-10025	High	2.0	<a href="#">Clemence Stickings</a>	Server Crash during peak traffic	Kylie Ward	Investigating	Worldwide	🟡
🟢	S-10026	Normal	2.0	<a href="#">Clemence Stickings</a>	Incorrect time for North America	Kylie Ward	Investigating	Worldwide	🟡
🟢	S-10080	Normal	2.0	<a href="#">Susan Blakeley</a>	error assigning time sheet to manager	Kylie Ward	Investigating	U.K.	🟡
🟢	S-10069	Low	2.0	<a href="#">Clive Stewart</a>	DLL error when exporting a file	Kylie Ward	Investigating	U.K.	🟢
🟢	S-10077	Low	2.0	<a href="#">Clive Stewart</a>	Post 12 O'Clock PM defaults to AM	Kylie Ward	Investigating	U.K.	🟢
🟢	S-10082	Normal	2.0	<a href="#">Susan Blakeley</a>	Cannot find recent time sheet report	Kylie Ward	Investigating	Worldwide	🟢
🟢	S-10083	Low	2.0	<a href="#">Clemence Stickings</a>	Context help facility..	Kylie Ward	Investigating	U.K.	🟢
🟢	S-2	Normal	3.0	<a href="#">Kieran O'Toole</a>	User Interface	Kylie Ward	Investigating	US East	🔴
🟢	S-10056	Normal	2.0	<a href="#">Req Barrow</a>	Crash on startup	Kylie Ward	Investigating	U.K.	🔴

Feature	Explanation	Benefit
Cases	Sage CRM defines Cases as customer incidents or requests for technical assistance. Cases include Service Level Agreements. Failure to abide by the time frame allocated to a case will result in the trigger of an escalation process, such as informing the Support Manager that there is a case past its cut-off date.	Ensures that cases are attended to in a timely manner to maximise customer satisfaction.
Knowledge Base	Articles about cases are called Solutions in Sage CRM. This is a powerful resource providing users with technical notes and solutions to known issues or questions which can be stored centrally in the Knowledge Base.	Provides easy and immediate access to a central bank of information and keeps accurate records of contacts with customers via Case Tracking and Communication logs.
Search	With Sage CRM, customer care consultants can search for known existing solutions to new cases in the Knowledge Base using powerful Sage CRM find technology.	Reduces resolution time as it enables users to find information quickly and easily, which ultimately results in improved customer care.
Customer Information	The company/person entities within Sage CRM contain a wealth of information related to each customer.	Profiles customers and their needs enables customer care organisations to work to meet their requirements faster based on the historical profile of the customer.
Workflow	The ability to define customer care processes and escalation points is controlled and managed by a feature in Sage CRM Customer Care called Workflow.	Adhering to workflow processes results in escalation and automatic notification to a Customer Care manager if the Case remains inactive for longer than the predefined period of time. This is a powerful automatic reminder that ensures each case is followed up on.
Customer Communications	Sage CRM Customer Care enables customer care users to view communications, contacts, leads, opportunities or cases for each customer in the database.	Improves efficiency and information organisation and reduces administrative time.
Reports	Several predefined reports are available to users. Sage CRM reports can be printed to PDF or exported to CSV as well as being delivered on screen.	Allows easy analysis of case details. Graphs may be added to make the report even more presentable and easier to examine. Reporting with Sage CRM is powerful, yet simple and easy to do.

Providing quality customer care and maintaining satisfied customers is a challenge for every business.

Sage CRM allows you to take care of your new and existing customers. By defining business processes, tracking cases and solutions becomes more automated and streamlined, enabling you to focus more time on growing your business while delivering best practise customer care.

#### About Sage CRM

Sage CRM is an easy-to-use, fast-to-deploy Customer Relationship Management solution comprising Sales, Marketing and Customer Service Automation. Highly flexible, Sage CRM comes with fully customisable business process automation and offers out-of-the-box integration to leading Sage ERP solutions.

Sage CRM is a fully web-based application and is available on-premise or on-demand for complete freedom of choice.



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