



SageCRM and Microsoft Outlook Integration

Integration with Microsoft Outlook comes naturally

SageCRM offers powerful integration with Microsoft Outlook. In addition to e-mail integration, the SageCRM and Microsoft Outlook integration enables bi-directional synchronization of appointments, tasks, and contacts—resulting in a convenient, straightforward, seamless user experience.

SageCRM offers the functionality to file Outlook e-mails against records in the SageCRM database providing users with a complete view of all correspondence. Users can send e-mails within SageCRM using Microsoft Outlook and automatically store the e-mail and any attachments with any given record. SageCRM also offers the ability to access and work with the entire SageCRM system directly through the Microsoft Outlook interface, increasing user adoption through familiarity and eliminating the requirement to switch between interfaces.

SageCRM and Microsoft Outlook integration can be applied across functions, departments, and roles, helping to increase user adoption and leading to greater efficiencies. And getting started is easy. Once the set up is complete users can leverage it immediately. The rapid implementation of this solution is only the beginning of a fast, efficient, and easy-to-use feature, which opens up innumerable possibilities and benefits.

BENEFITS

Synchronize e-mails, appointments, contacts, and tasks between SageCRM and Microsoft Outlook

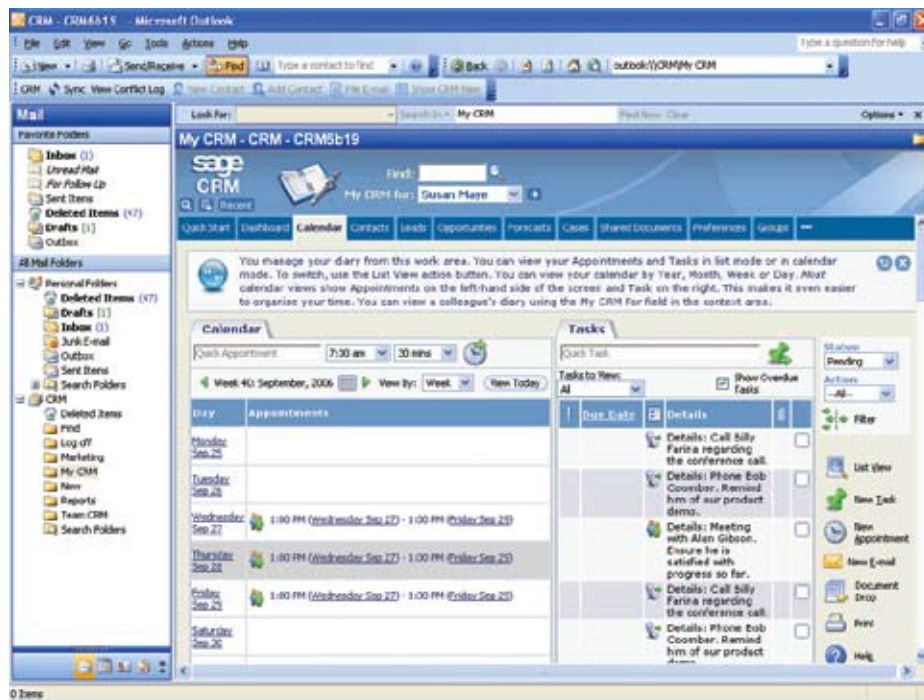
Work with Microsoft Outlook while in SageCRM or vice versa

Get started quickly and begin taking advantage of the benefits immediately for a rapid ROI

Improve information sharing across your company

Enhance user adoption by providing employees with a system that looks and feels familiar

Cross-reference information between SageCRM and Microsoft Outlook for better analysis



◀ SageCRM has complete, two-way synchronization with Microsoft Outlook contacts, calendar (appointments) and tasks, in addition to enhanced e-mail integration.

About SageCRM

SageCRM is an easy-to-use, fast-to-deploy, feature-rich Customer Relationship Management solution with out-of-the-box but configurable business process automation. Access methods include both hosted and deployed models through a Web browser.

Feature	Description	Benefit
Planning Appointments and Tasks	With the SageCRM and Microsoft Outlook Integration users can simply and seamlessly synchronize appointments and tasks. Synchronization is bi-directional meaning SageCRM and Microsoft Outlook are simultaneously updated.	Ensures that every user's calendar is up to date at all times, regardless of their chosen interface, and results in increased productivity as the requirement to use two interfaces is eliminated.
File E-mails and Import E-mails	Match Outlook e-mails with records in SageCRM	Improves access to information and knowledge sharing organization-wide. In addition, this function ensures that information is not locked onto one machine or restricted to one user.
Staff Adoption	Using the SageCRM and Microsoft Outlook integration, staff can use the SageCRM system from within the familiar Microsoft Outlook interface.	Enhanced CRM implementation success and higher internal staff adoption rate.
Access to Information	Information is centrally stored and accessible by all team members.	Vital for organizational succession planning purposes.
Customer Service	All customer communications are recorded in the SageCRM system regardless of the interface used by employees.	Organizations can offer enhanced customer service as information is never mislaid or accidentally deleted.
Access to Information	Accelerated access to information with the ability to search for communications and contacts using powerful SageCRM find and advanced tools.	Customers benefit from shorter turnaround times and organizations can commit to and meet tight Service Level Agreements.
Customer Communications	All customer communications and attachments can be stored in the SageCRM database and cross referenced with Microsoft Outlook.	Builds a history of the relationship and enables sales and marketing teams to use more targeted communications.
Data Flow	Contacts and calendar items flow between the SageCRM and Microsoft Outlook applications.	Empowers users to work the way they want to.
User Preferences	Some users prefer to work within the Microsoft Outlook interface and some prefer to use the SageCRM interface.	All relevant information is maintained centrally for team and managerial benefit—SageCRM recognizes the nuances of individuals and no information is lost.
Working Practices	The SageCRM and Microsoft Outlook integration streamlines working practices.	Enables better process management while recognizing that employees are unique and respecting their preferences.

ABOUT SAGE SOFTWARE

Sage Software supports the needs, challenges, and dreams of more than 2.7 million small and mid-sized business customers in North America through easy-to-use, scalable, and customizable software and services. Our products help manage a complete range of business functions including: accounting, operations, customer relationship management, human resources, time tracking, merchant services and the specialized needs of the construction, distribution, healthcare, manufacturing, nonprofit, and real estate industries.



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