

sage

Sage 100cloud & Office 365

Integration Preview

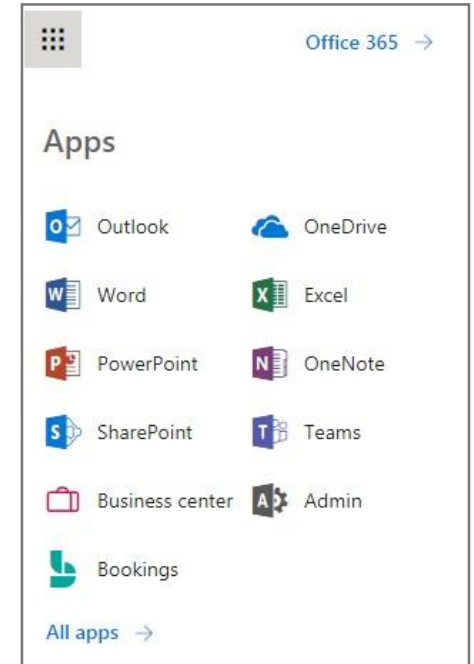
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Sage Contact

- Sage Contact is an **Outlook add-in** that provides key information about your **customers** and **suppliers** through Office 365.
- It's a really useful feature for Sales Reps who spend a lot of time on the road, like our persona Steve.
- With **Sage Contact**, Steve can access key information he needs to prepare for customer meetings anytime, from anywhere.
- Sage Contact is available through Outlook in Office 365 from a laptop, a tablet or mobile device through the browser.
- It can also be accessed from Desktop Outlook.

Sage Contact

- Although Sage Contact is equally as useful when dealing with suppliers, lets' say Steve is out of the office today on his way to meet a customer.
- He wants to make sure he is fully aware of the **state of play with his customer** before the meeting.
- Previously he would have called the office to do these checks.
- Now he simply needs to open a recent email *To* or *From* the customer and select the Sage Contact icon.



Sage Contact – Overview tab

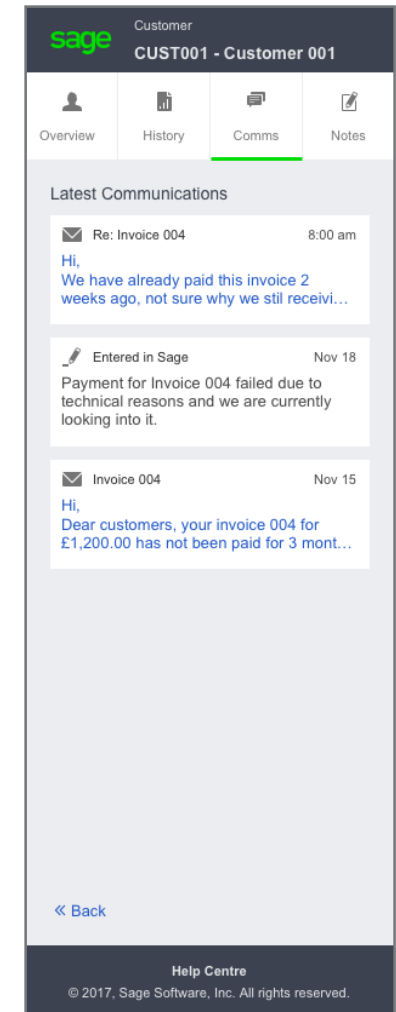
- The **Overview tab** is displayed by default on the side panel.
- From here **Steve** can view the customer's available credit, and he can see clearly whether the outstanding balance is ok or a cause for concern.
- Other contact details are displayed here too which may be useful, like the address and phone number.
- The contact details can be updated directly from the app and are reflected in Sage 100cloud straight away.
- This is useful for **Anne** back in the office too, as she doesn't need to switch between apps if she's working in Office and wants to make updates.

Sage Contact – History tab

- The **History tab** shows Steve how much money is owed by the customer at a glance.
- It tells him how many days on average it takes them to settle a bill.
- Steve can click through the last 20 customer **invoices** to review the details.
- And he can look at the last 20 **payments** received from them too.
- This is all useful information to have before the meeting starts.

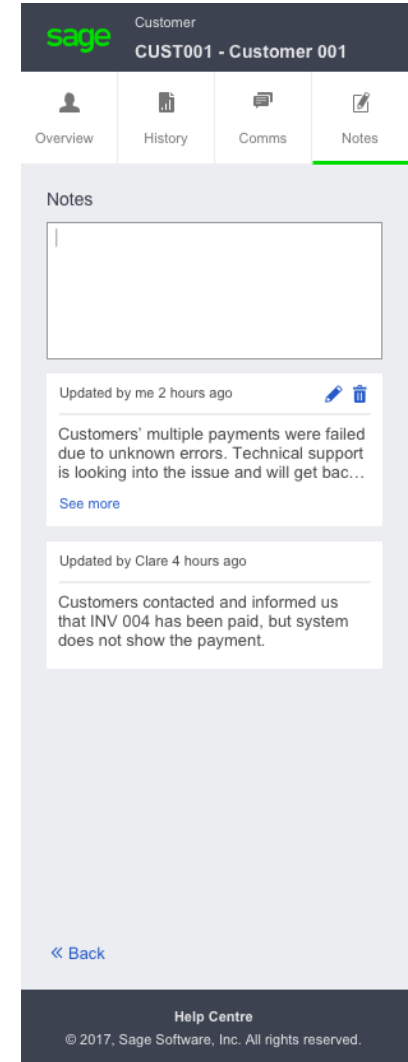
Sage Contact – Comms tab

- Next Steve selects the **Comms tab**.
- From here he can review recent customer communications and emails quickly and easily.
- The tab displays emails *To* and *From* the customer as well as communications entered directly in Sage 100cloud.
- If he wants to reply to an email, Steve can simply select it to open it.
- Up to 10 items can be displayed on the Comms tab, sorted by the most recent, so Steve can get an up-to-date picture at all times.



Sage Contact – Notes tab

- The **Notes tab** can display notes created in Sage Contact and memos from Sage 100cloud
- It's really useful when Steve wants to record important information “on the fly” during the meeting, or if he want to review existing notes and Sage 100cloud memos in advance
- And Anne can access the **notes and memos** back in the office from Sage 100cloud, or through Office 365
- The Notes are shared across other Sage Contact users, and Steve can see who has made the most recent update



The screenshot shows the Sage Contact interface for Customer CUST001. At the top, there's a header with the Sage logo and the text "Customer CUST001 - Customer 001". Below this is a navigation bar with four tabs: "Overview", "History", "Comms", and "Notes". The "Notes" tab is currently selected and highlighted with a green underline. The main content area is titled "Notes" and contains a large text input field at the top. Below the input field, there are two note entries. The first entry is titled "Updated by me 2 hours ago" and contains the text "Customers' multiple payments were failed due to unknown errors. Technical support is looking into the issue and will get bac...". The second entry is titled "Updated by Clare 4 hours ago" and contains the text "Customers contacted and informed us that INV 004 has been paid, but system does not show the payment." At the bottom of the notes list, there is a blue link that says "<< Back". The footer of the interface includes the text "Help Centre" and "© 2017, Sage Software, Inc. All rights reserved."

Sage Contact

- As you can see, Sage Contact is a really useful tool for Sage 100cloud users who need access to key customer and supplier information when they are on the road.
- It enables them to prepare for customer and supplier meetings without having to call back to the office and pull information directly from Sage 100cloud.
- It empowers them to make decision on-the-fly because the information they need is available now, from their laptop, iPad or mobile device.
- Sage Contact targets the most valuable pieces of information that Sales Reps, Business Owners and other key employees need.
- This ensure that they can negotiate deals, build confidence, and do better business with their customers and suppliers anytime, anywhere.

