



## SageCRM Dashboards

### SageCRM Dashboards serve up information on a silver platter

SageCRM Dashboards are designed to allow users organize the way they view and work with information in accordance with their personal preferences. This powerful feature is included with every installation of our award-winning solution and has the potential to revolutionize access to information, making it useful on a daily basis.

SageCRM Dashboards offer a myriad of features and configuration options, so individual users can have tailored experiences. This combats resistance to the CRM implementation. And it enables your company to reap the benefits of efficiency, effectiveness, and excellence in the workplace.

With your SageCRM dashboards you can provide your company with valuable information, such as:

- A snapshot of companies you most often work with.
- A list of high priority cases assigned to you.
- Outstanding appointments.
- A list of recently viewed leads.
- A pie chart of opportunities by territory.

The possibilities are endless!

### BENEFITS

View customer and personal data the way you want to, when you want to

Access information easily

Analyze data speedily

Review customer accounts quickly

Provide optimal customer support

Integrate external data sources such as news feeds of relevant information



◀ SageCRM Dashboards enable users to create personalized views of the information that's most relevant to them. With instant access to timely reports and other information, your sales, marketing, and service professionals can work more strategically.

### 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
<b>Viewing Information</b>	<p>SageCRM users have the ability to customize the way they view data in their CRM dashboards; for example, it is possible to apply a two or three column format to the display view, to maximize and minimize each block, and to arrange the order and appearance of information.</p> <p>The solution also provides the ability to organize information per category as determined by user preferences. A right click menu makes accessing Dashboard information even easier and more efficient.</p>	The SageCRM Dashboard enables users to tailor the Dashboard screen to display their individual data requirements.
<b>Accessing Information</b>	<p>All SageCRM users have the option to create multiple interchangeable dashboards. This enables them to access higher level information on a weekly basis or to reach monthly and quarterly overviews or combinations of information in accordance with their requirements and desires.</p> <p>Users may access favorite and saved searches in one click from their Dashboard. A summary of saved searches can be displayed on one or a number of Dashboards.</p>	This feature adds value to the Dashboard by ensuring that dynamically generated search results are easily accessible and speedily returned.
<b>Analyzing Information</b>	<p>Users have the option to save reports to their SageCRM Dashboard. It is also possible to save the same report to multiple Dashboards. The Dashboard features a comprehensive reports area with an extendible menu.</p>	Analysis of reports is fast and simple with a function to drill down to get detailed information.
<b>Working at the Company Level</b>	<p>In addition to the many benefits offered by the SageCRM User Dashboard, we also offer a Company Dashboard which is designed to display a management overview of the status of the customer account. This overview could include charting overdue cases, high priority opportunities or snapshots of upcoming meetings and events.</p>	Enables users to garner information about any company in the database speedily, thus empowering them to be experts on every account and to leverage opportunities or address outstanding issues as necessary.

## ABOUT SAGE SOFTWARE

Sage Software supports the needs, challenges, and dreams of more than 2.7 million small and midsized 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.

