



Sage PFW ERP

Customer Insights

The most important asset to the success of any business is its customers. Now more than ever, building customer loyalty is critical in any business. Today, consumers have many options available. Not only is there local competition, but with e-commerce, there are unlimited places for your customers to spend their money. Gain the competitive edge you need to retain your current customers and acquire new ones. The Sage PFW ERP Customer Insights module provides you with the tools you need to provide superior customer service!

Empower your personnel with the information they need to proactively satisfy your customers by giving them fast, personalized attention with every interaction. With Customer Insights, your employees can be well informed on all aspects of the customer so they can quickly respond to inquiries, effectively sell more products, and quote accurate product pricing. Customer Insights facilitates quick access to detailed credit status, pricing, quotes, orders, sales information, history information, and more. You can even use flexible PivotTable functionality to pinpoint vital information. The more customer knowledge you have, the easier it is to provide exceptional service and create new revenue opportunities in your existing customer base.

Customers are the lifeline of your business—handle them with insight!

From Qty	To Qty	Discount	Price
0.00001	99.99999	0.0000%	28.00000
100.00000	199.99999	-2.000000%	27.44000
200.00000	299.99999	-5.000000%	26.60000
300.00000	999.99999	-10.000000%	25.20000
999.99900000	9.999.999.99.99	-15.000000%	23.80000

ACCESS BUSINESS CRITICAL INFORMATION

Empower your staff with quick and easy access to comprehensive information on your customers.

STREAMLINE INTEGRATION

Customer Insights captures critical information from several Sage PFW modules, and brings it together in one easy-to-navigate screen, creating one complete “snapshot” view of your customer.

BUILD CUSTOMER LOYALTY

Quickly satisfy customer inquiries and provide an unparalleled customer experience that will keep your customers coming back for more.

QUOTE ACCURATE PRODUCT PRICING

Gain customer confidence and loyalty by providing accurate quantity discounts and price specials that maintain your profit margins.

SELL MORE PRODUCTS

Know what your customers need to order, before they do! Powerful, sophisticated sales analysis tools help identify sales opportunities based on ordering trends, resulting in a boost to your bottom line.

SECURE BUSINESS INTEGRITY

Protect your most valuable asset—your customer data. The tight security of Sage PFW software ensures your vital customer information is protected while providing reliable and accurate information.



Access Business Critical Information

Leverage information that is easy to access, manage, and analyze to improve customer service and for faster decision-making. One easy-to-navigate, comprehensive screen empowers your employees to communicate confidently with customers. With proper security, employees can click on the Address, Credit, Pricing, Quotes, Orders, Order History, Open Invoices, Invoice History, Pay History, Shipments, or Sales Analysis view to access the associated customer information. With the touch of a button, employees can view and revise essential data—prompting quick and effective responses to your customer’s inquiries.

Streamline Integration

A critical component of success is cross-team visibility to ensure the right people have access to the right data, so they can efficiently respond to prospects and support customers. Customer Insights seamlessly pulls together data from throughout your Sage PFW solution. Not only can authorized employees view detailed information, but they can also simply double-click to open and edit such items as invoices and orders. Customer Insights helps you make your customer service workflow more efficient and provides the details required to keep your employees better informed for effective decision making.

Build Customer Loyalty

Set your company apart from competitors by focusing on quality and excellence in customer service. Customer satisfaction builds loyalty and often trumps price as a primary consideration of consumers. Avoid losing customers due to a disengaged customer experience with your company. Customer Insights puts your employees in the know and can help you increase customer satisfaction levels by responding to their problems faster and more accurately. Customer notes and attachments provide your staff with tools to enhance internal communication, so users can be proactive with access to detailed notes on a customer’s preferences, call notes, product cross-sale and upsale specifications, and more. Provide the best possible experience for each customer interaction—the service and assistance you offer is uniquely valuable to customers and gives you a competitive advantage.

Quote Accurate Pricing

Win business by providing accurate, consistent price quotes in less time, and offering your customers the best possible price. The Pricing view allows access to detailed pricing information, including price specials, and quantity break discounts that are specific to a product for a customer. Quote customers accurate pricing for any quantity they might want to purchase right over the phone. And because employees are informed, they can offer the lowest price available while maintaining profit margins. This view also shows current stock information for the item, as well as base price and cost information. Additionally, the view shows the price the customer paid the last time they purchased the item, as well as alternate item information. And even better, all pricing is delivered in the customer’s currency, so you’re speaking in monetary terms they can understand. This detailed information allows key decision makers in the sales processes to evaluate deal attractiveness based on revenue, margin, and inventory. By optimizing profitability deal by deal, your company in turn can increase sales effectiveness, bringing long-term profitability and revenue growth.

Sell More Products

Customer Insights provides salespeople with full visibility to their customers, so they can measure and monitor their customers’ purchases. Each salesperson can drill down and use PivotTable functions to analyze a customer’s past sales and discover trends in purchasing history. The salesperson can then directly contact the customer to discuss promotions on products that coincide with other needs expressed in past conversations. Even better, with this information you can market products and services in ways that more directly reflect the individual customer requirements. You gain a suitable marketing opportunity with a receptive customer, and your customer perceives you as a company that tailors itself to his particular desires, helping to increase loyalty and, more importantly, retention.

Secure Business Integrity

Rest assured that with Sage PFW, your customer information is secure. For each Customer Insights view, you can define read or write access to individual user groups. For example, you can grant access to Address, Order, Order History, and Shipments views to employees who respond to customer inquiries, but only to the extent required to do their job, so you could prevent access to Credit and Sales Analysis views. With Customer Insights you can take the necessary steps to preserve the security, confidentiality, and integrity of your customer information.

“All of our data is tied together in one place. We know which items are in stock and can give customers accurate lead times, which helps secure ownership of our niche in the marketplace.”

Adrienne Olson
Controller
Sierra Corporation

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