Sage CRM - Customer Service Automation

With Sage CRM Customer Service, you can build and effectively manage lasting customer relationships by providing the professional level of service your customers expect.

Sage CRM provides real-time access to relevant customer data including orders, call and escalation history, interactions, multiple contacts, support cases, e-mail and documents sent and received, sales opportunities, and more.

Sage CRM can enable you to provide better customer service, which means happier customers, better retention rates and more profitable relationships.

Case Management

- Capture and track every interaction with every customer regardless of customer touch point or channel of communication
- Maintain a complete case history with instant access to all previous issues and customer interactions

Activities & Communications

- Assign, schedule and track phone calls and meetings and view records of previous meetings
- Send emails (plain text or HTML) and attachments and record communication for future reference
- Attach documents - for example, white papers, quotes, brochures - from the document library

Reporting & Dashboard

- Design your own dashboard view of what is in your support queue
- View and measure call turn around time and understand what is taking longer to resolve and why

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- View issues by category, outstanding and unresolved issues
- Pull graphical reports for weekly, monthly or quarterly management meetings
- Never miss another SLA (Service Level Agreement) with our unique configurable traffic light system to graphically flag each case's SLA status.

Knowledge Management

- Share customer information internally or externally to allow customers and partners to resolve their own issues
- Build a library of solutions to common customer issues to help the customer service team resolve issues faster

Customer Self Service Portal*

- Provide your customers with web access to their own 'customer portals', which they can access at their convenience 24/7*
- Allow customers to log queries, make service requests and view the status of existing or past requests*
- Customise your self-service portal to match the look and feel of your corporate identity, ensuring your corporate brand is kept consistent through all customer touch points*

Escalation & Notification

- Set up rules to automatically escalate cases if not closed within a certain time period
- Receive notifications automatically, through e-mail, web browser, on screen, phone, etc, when cases are not resolved within a certain amount of time

Ticket Tracking

- Never lose an issue/service request in the organisation by tracking and recording of all requests through all stages of response

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- Date-stamp all issues at time of resolution or escalation for internal management and external auditing of service
- Ensure ownership and accountability over requests by making the representative working on the ticket always visible as the ticket moves through your organisation.

*** Unavailable or limited when using the software in an on-demand model.**