SAGE ACCPAC

Sage Accpac Extended Enterprise Suite
for service, financial, and insurance industries

Whether your business is in the service, financial, or insurance industry, you'll find the right solution in the Sage Accpac Extended Enterprise Suite.

Sage Accpac Extended Enterprise Suite for Service-Based Businesses

Sage Software provides a completely integrated suite of applications to streamline your service and support processes at virtually any touchpoint. As the owner or manager of a service-based business, you know that the key to success is a streamlined and efficient call center that presents all the information quickly to your staff when they need it. And, this information must flow throughout the business, from the call center to the technicians on the road and ultimately to the customer through a Web login or SMS technology.

Sage Accpac Extended Enterprise Suite provides service-based businesses:

- A holistic view of all customer interactions from call logging to dispute resolution

- Complete integration with many Sage Accpac solutions or third-party products

- Full tracking of jobs and planning of resources and subcontractors

- Integrated Call Center with escalations and alert management

- Web and wireless access to information anywhere, anytime

- Full PDA capability for mobile sales force and mobile technicians, allowing them to receive and process jobs on the move

- Award-winning integrated e-marketing solution for effective marketing communications

Sage Accpac Extended Enterprise Suite for Financial Institutions

SageCRM, part of the Sage Accpac Extended Enterprise Suite, provides a complete solution for sales, marketing, and customer service for banking, institutional finance, wealth management, capital, and brokerage firms. In a world of decreasing commission revenues and no-fee self-serve transactions, financial institutions must understand and manage their customers' portfolios better in order to deliver a service that warrants solid return.

Sage Accpac Extended Enterprise Suite allows financial institutions to:

- Deliver proactive targeted marketing on wealth management

- Focus on improving customer care through workflow and tasks managed by Service Level Agreement

- Eliminate information silos caused by disparate systems

- Get a holistic view of the company

- Integrate with legacy operational systems to get a consolidated history of your customer

- Analyze data for cross-selling and up-selling opportunities

- Deliver better service and improved productivity through coordination of products and resources

- Attract and retain customers as well as extend services into existing customer relationships

Sage Accpac Extended Enterprise Suite for the Insurance Industry

SageCRM allows the insurance industry to consolidate data from back-office systems that may include claims management, policy management, and application management with Optical Character Recognition (OCR) and document management capabilities.

This in turn gives your employees, agents, and customer service representatives (CSRs) a holistic view of your customers' portfolios at their fingertips. This leads to better service, up-sell, and cross-sell opportunities as well as targeted marketing campaigns and activities through key attribute profiling.

Sage Accpac Extended Enterprise Suite offers these benefits to the insurance industry:

- A complete suite of modules that enables insurance companies to manage and integrate all customer communications, embracing all channels of communication

- SageCRM to streamline sale channels, including brokers, agents, call centers, and employees

- Claims management with integration to external claims/ billing systems

- Quote management tracking and policy management with automated workflows

- Claims management with integration to Web self-service

- Complete document management and OCR capabilities for storing all documents, such as insurance and ID certificates

- Improved risk assessment through better management, storage, and access of information by the business units

- A self-service Web-based integration platform to manage relationships with insurance brokers, agents, and customers while lowering costs and reducing the number of calls to the call center

- Integration with billing systems, so that billing and payment matching processes are automated

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