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info Newsletter
For SageCRM

Front Office/Back Office Systems Integration

How many software applications store customer information in your organization? If your company is like most, different types of customer information are kept in two or more applications. No doubt your chief financial officer wanted the best possible accounting application with excellent audit trails, built-in controls, and flexible reporting options. He or she likely did not check with the sales department when selecting this application. Your sales executives, seeking greater visibility into sales pipelines and ways to make the sales team more effective, went looking for the ideal customer relationship management (CRM) and sales force automation tool to implement. Again, they probably didn't check in with finance when making their selection.

Connecting your front and back-office data can contribute to a harmonious workplace.

Each department now has the best-of-breed solution for their needs and can live happily ever after, right? The problem is that both systems contain customer information that the other system needs, resulting in duplicate data entry and inefficient workflow for both your front and back-office staff.

Reasons To Integrate Your Systems

There are many reasons to integrate your front and back-office systems. Here we look a just a few.

Impact On Staff Productivity

When information exists in systems that don't communicate with each other, it is likely that your staff is operating without the information they need to be most effective in their jobs. Sales representatives may work on new opportunities without realizing the customer has exceeded their credit limit or has an invoice seriously past due. When the sales team closes a deal, the order must be rekeyed into the back-office system by the accounting staff, incurring both the unnecessary overhead of duplicate data entry and the possibility of errors.

Internal Conflict

The lack of a centralized view of all customer information in an organization is often a source of conflict between staff members. Back-office staff may have concerns about access to confidential accounting information, and may believe that customer-facing staff ignore internal procedures. Conversely, front-office staff may see back-office

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Headline News

For the fifth consecutive year, SageCRM/SageCRM.com has been selected by ISM Inc., Customer Relationship Management (CRM) and eCustomer strategic advisors, as a Top 15 CRM Small & Medium Business Software Award winner for 2007. ISM awards have been considered the industry benchmark since their inception in 1990.

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staff as creating unnecessary bottlenecks in the sales process. It is important to recognize these common attitudes and address them directly when you integrate front and back-office systems.

Impact On Customer Satisfaction

Imagine the annoyance of a customer who places an order with his sales representative, only to find out a week later that the order is on hold in the accounting department awaiting additional information. When the order is finally released, an entry error results in the wrong product being sent. This is a serious problem in the current highly-competitive business environment, in which customer satisfaction is critical.

Benefits Of Integration

By integrating the front and back-office systems, you can provide a complete view of customer information to everyone in the organization. Not only will team members have the information they need to be productive in their roles, relationships between departments inevitably improve because everyone is operating with the same information pertaining to customers and orders. When executed properly, integration can result in increased productivity and company-wide efficiency. Customer satisfaction improves because customers get faster and more efficient service. Ultimately, the organization realizes greater profitability as internal productivity soars and satisfied customers return again and again.

Systems Integration Basics

The precise needs of individual organizations will vary according to industry-specific requirements, but a base level of functionality is useful to virtually every organization.

Front Office Information Needs

Your sales and customer-facing teams are most effective when they can handle all a customer's needs right away, without having to check with accounting and call back later. When a sales representative calls to close a sale, the chances of closing are greatly improved if the customer's other questions regarding the status of an earlier order, available credit, or past due amounts can be answered up front.

In order to provide customers with accurate product pricing and availability, your sales team also needs access to invoice history, open invoices and payments, open orders, return orders, item prices, contract prices, price codes, and quantities available by warehouse.

With most accounting information, the customer-facing teams only need inquiry access, without the need to change information. However, updates to billing and shipping addresses and contact information are likely to arrive in the customer service department first, and it may make sense to automate the transfer of this type of information to the back office.

Back Office Information Needs

If orders generated by the sales team are then keyed into the accounting system by back-office personnel, an opportunity for error is introduced into the process.

For increased efficiency, orders generated by the front office need to flow automatically into the open order file in the back office. Not only is the potential for error reduced, you will realize greater productivity as duplicate data entry is eliminated. Automatic updates to customer information such as new contacts, new addresses, and telephone numbers will save the accounting department time as well.

Create The Win/Win

With a well-integrated system, everybody wins. Customer-facing staff win by having all the data to answer customer questions at their fingertips. They can quickly get past the current order or invoice status questions and move on to closing the next sale. Accounting staff win with the elimination of duplicate work re-keying orders and reduction of the time spent answering questions from the sales team. Customers win by receiving faster and more accurate service. The organization wins by the resulting increased profitability.

Making It Happen

Sage Software understands the benefits to be gained through front-office to back-office integration and has designed SageCRM to integrate readily with back-office systems.

If you already own one of these ERP solutions, you have the ability to quickly implement a very powerful integration. If you are in the process of selecting a new accounting or ERP system, the available integration options can be a powerful factor in the decision-making process.

Give us a call to discuss your front-office to back-office integration needs. ☆

Tips & Tricks

Here are the steps for creating a New Mail Merge Template in SageCRM:

1. Determine the entity to be associated with the template. This will determine which fields will be available for the template. Entities that can be used for mail merges are: Company, Person, Lead, Opportunity, Case, Quote, and Order.
2. Open a record of the chosen entity. For example, if using the Case entity, find a case record and open it.
3. Right-click or hover over the New icon and select Document. Doing so will display the *Choose Letter Options* screen.
4. Select the *Create New Local Template* option. Click *Continue*. The *MergeBlankDoc.doc* file will open in Microsoft Word.
   If this document does not open, search for the MergeBlankDoc.doc file. This file can be found in the __\DocTemplates\Letters-A4\US directory (version 5.7) or __\Library\Global Templates\US (version 5.8).
5. To add the merge fields to the document, click the *Insert Merge Fields* icon.
6. Click *Insert* to add merge fields to the document. ☆