

## Sage CRM / Sage 100 Pilot Package

My CRM Manager can install Sage CRM on your network and integrate it with your Sage 100 system for a fixed fee of \$1,950. Seeing Sage CRM with your data and investigating its capabilities is a great way to seriously evaluate how your organization can benefit from using it.

### Sage CRM / Sage 100 Pilot Package

- ✓ Install Sage CRM
- ✓ Configure the integration with Sage 100 (Greytrix version of the integration)
- ✓ Integrate Sage CRM with either a Sage 100 test database or your existing live database (you decide)
- ✓ Conduct 3 one-hour training sessions with one of our Sage CRM Project Managers

To move forward, please send us a confirmation email. We require an upfront payment of \$1,950 and for you to complete an installation checklist before we can start the project. Once we have proper access to your environment, our technicians require two business days to install Sage CRM. After the installation and integration have been completed, we can schedule the training sessions.

### FAQs

- a) **What is the objective of the Sage CRM Pilot Package?** Ultimately, the objective is to provide you with a 'proof of concept' system so you can properly evaluate if Sage CRM is a good fit for your organization.
- b) **What is included in the training sessions?** We have an agenda of important topics to go through such as (a) using Sage CRM as a communication tool, (b) profiling information, (c) using Sage CRM in conjunction with Outlook. However, how you choose to spend the time is up to you.
- c) **Are any exclusions applied to the training sessions?** The 3 one-hour training sessions are restricted to training and strategy topics. We cannot include ongoing emails and support for this small fixed fee engagement.
- d) **Is there a time limit to complete the training sessions?** Yes, these training sessions should be completed within 30 days from the completion of the technical work (installation and integration).
- e) **Can we get more details about Sage CRM in advance of committing to the Pilot Package?** Yes, you can contact us directly or visit [www.mycrmmanager.com](http://www.mycrmmanager.com).
- f) **Are we under any commitment to continue working with My CRM Manager after completing the Pilot Package?** No.
- g) **What happens if we decide to pursue the Sage CRM software licensing after completing the Pilot Package?** A software user licensing request would need to be submitted and the appropriate license keys would need to be applied. On the second page of this document, we have outlined the various software components that are commonly associated to a Sage CRM project. If you do decide to go forward after the Pilot project, we will meet with you to review these charges in detail.
- h) **What other charges could apply?** Typically, organizations require assistance in planning and deploying Sage CRM, just like with Sage 100. The extent of how the services your organization will (or will not) require will be clearly understood by the end of the Pilot project. Should any additional services be required, they would be quoted on and agreed to in-advance. An outline of your support options for Sage CRM can be [viewed from this link](#).

**Software Charges commonly associated to a Sage CRM project include:**

- i) **Sage CRM User Licenses:** The monthly subscription fee to use Sage CRM is based on the number of users. For less than 10 users, the per user rate is \$420/annually if you prepay for the year or \$39/user/month if you elect to pay monthly. The subscription rate drops down to \$384/user/year if you have between 11 and 25 users (or \$36/month). Prices continue to go down for 26 or more users. Regardless of how many users you have, your subscription entitles you to all documentation and training materials published by Sage as well as access to toll-free phone support.
- j) **MS SQL Licensing:** Sage CRM (the application) uses MS SQL as the underlying database. To run Sage CRM, MS SQL Standard Edition is required (not SQL Express). If you do not already have MS SQL, it is often least expensive to acquire it through Sage as Sage has an OEM agreement with Microsoft. The SQL licensing for this is referred to as 'Sage runtime MS SQL'. Currently this provides us with MS SQL version 2016 Standard Edition. Pricing for SQL is variable and depends on the number of Sage CRM users. If required, the charge for this will come from Sage and is typically embedded in the Sage CRM subscription agreement as a separate line item.
- k) **Sage 100 Integration:** Beyond using Sage CRM to manage our interactions with companies and people, by connecting Sage CRM with Sage 100 we can also provide customer facing staff with the option to view accounting data and create orders. We strongly recommend the Greytrix integration and our budget on page 1 assumes you would use this Greytrix integration. The cost for the integration is \$192/user/year. More information can be found at this link: <https://mycrmmanager.com/sage-connected-services/sage-100-crm/>
- l) **Accelerator:** While Sage CRM comes bundled with an Outlook Plugin which allows you to file emails from Outlook into CRM, we strongly recommend the more robust Outlook integration called Accelerator. We strongly recommend Accelerator because it has such a dramatic impact on adoption and productivity. Here is a 2-minute video overview of this solution: <https://www.youtube.com/watch?v=NM9dGzVDfmk> This utility is published by [CRM Together](#). The cost for this add-on is \$140/user/year.
- m) **MobileX:** There are 3 ways to use Sage CRM on your smart phones. MobileX is the solution we use internally and recommend for our clients. MobileX is also published by CRM Together. Here is a 90-second video summarizing your mobile options with Sage CRM: <https://mycrmmanager.com/sage-crm/mobile-access/> MobileX is normally also 140/user/year however, if you purchase it in conjunction with Accelerator, it is ½ price (\$70/user/year).