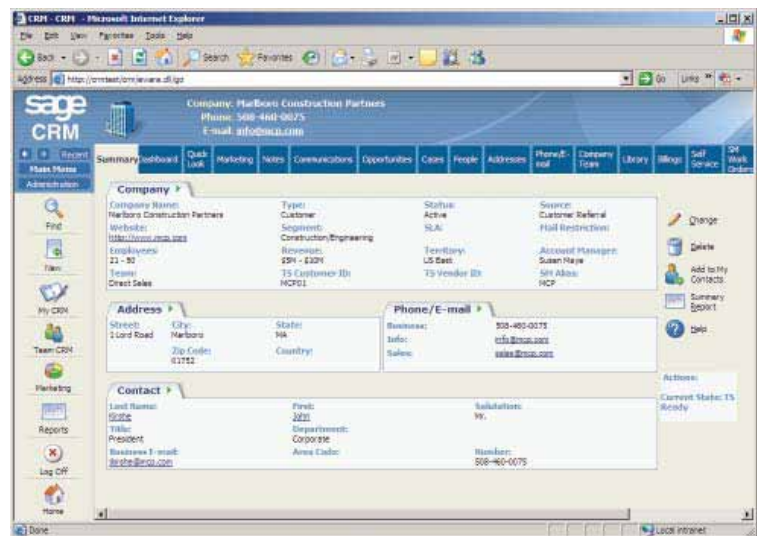


Sage CRM for Sage Timberline Office

■ Sage CRM™ is an award winning, wireless and Internet based CRM system that provides enterprise-wide access to vital customer, partner and prospect information—anytime, anywhere—and now it works with Sage Timberline Office.

Sage CRM uses industry-leading technology to foster better business practices and information exchange throughout your enterprise. With Sage CRM, you can quickly analyze, manage and synchronize sales, marketing and customer care activities across all points of contact. Regardless of how, when or where your customers, partners and prospects choose to interact with your company, Sage CRM gives you a decisive advantage by providing comprehensive, easy-to-use tools to successfully manage these relationships.

Sage CRM offers a full range of hosted or an onsite deployment option, which means you get complete flexibility to run your business your way. As your business needs change, you can quickly and easily switch deployment environments (from hosted to on-premises deployment, or vice versa), and all your CRM customization and data move with you.



SAGE CRM OFFERS INTEGRATION BETWEEN YOUR FRONT- AND BACK-OFFICE SYSTEMS.

Flexible, Adaptable CRM

Sage CRM offers unmatched flexibility and performance with advanced features, industry-leading technology and a robust architecture built to stand the test of time. It integrates seamlessly with industry-leading Sage Software business management applications such as Sage Timberline Office, and also works with applications from other vendors.

Sage CRM includes:

Sales Force Automation – Sage CRM puts you in complete control of your sales pipeline, allowing sales teams to effectively manage, forecast and report on all phases of the sales cycle. With Sage CRM, you can easily manage

and analyze all current and historical account details and activities, manage multiple accounts and opportunities and automatically distribute leads to sales professionals around the world. Point-and-click reporting and graphs offer sales teams access to real-time data, for on-the-spot analysis and evaluation. By analyzing the information available, you can more effectively prospect for new clients and resell to existing ones.

Marketing Automation – Sage CRM provides a single source of customer information to help you better manage your marketing efforts and make sound decisions based on the needs of your customers and prospects. With Sage CRM

YOUR CONSTRUCTION & REAL ESTATE TECHNOLOGY EXPERTS.
CALL US AT 866-482-3400 FOR MORE ON SAGECRM





We were blown away by what we saw in the product demo. Sage CRM offered everything we were looking for... We've been using it like crazy and loving it. We're getting an immediate ROI and realizing big productivity gains.

– Eric Robichaud, CEO
Mediaweave



Sage CRM provides your marketing, sales, project and customer service teams with the tools they need to find new customers, close sales faster, and build lasting, more profitable relationships across all channels. With Sage CRM, you can:

- Empower your staff with access to vital customer, partner and prospect information.
- Integrate with Sage Timberline Office for efficient access to customer data from Accounts Payable, Accounts Receivable, Payroll, Job Cost, Service Management, and Property Management.
- Build long-lasting customer loyalty and generate repeat sales from your best customers.
- Analyze, forecast and report on key sales data.
- Identify, execute and replicate effective marketing initiatives across your sales channels.
- Access relevant customer data in real time, including purchases, call and escalation history, interactions, multiple contacts, support cases, e-mail and documents sent and received, and sales opportunities.

Integration:

Marketing, you can target the right customer at the right time, eliminate guesswork and put your company's marketing resources to their best use. You can schedule and track marketing activities within a campaign – and view every detail of each campaign.

Customer Care Automation – With Sage CRM, you can make the most of every customer interaction, maximizing business opportunities and customer satisfaction. It empowers your organization with critical information to build and support long-term customer satisfaction and loyalty. With Sage CRM Customer Care, 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 purchases, call and escalation history, interactions, multiple contacts, support cases, e-mail and documents sent and received, sales opportunities and more.

Web and Wireless Access

Access Sage CRM anytime, anywhere using a standard Web browser, cell phone or wireless PDA. Even when not connected to a network, mobile users can work offline and later synchronize with the central server, using the optional Solo Server.

Web Self Service

Sage CRM Web Self Service allows customers to access information or request services and support over the Web whenever they want. Customers receive information based on their preferences, requests and history through customized customer and partner portals.

Microsoft Outlook and Lotus Domino Integration

Sage CRM integrates with today's most popular e-mail and calendar management systems, such as Microsoft® Outlook® and IBM® Lotus® Domino™.

Automated Workflow

Integrating business rules across all channels, departments and employees is easy with Sage CRM automated workflows. In combination with e-mail integration, Sage CRM ensures that actions requiring attention or escalation are automatically routed to the appropriate employees or partners.

True Customizability

Sage CRM provides customization tools such as Enterprise Integration Server (EIS) to rapidly modify all aspects of the system. You can create functional components that query ODBC-compliant databases and third-party software and extend your Sage CRM system out to different devices. Its open architecture reduces development and maintenance costs and allows seamless integration with other applications.

Computer Telephony Integration (CTI)

Sage CRM CTI links your Sage CRM system to TAPI phone switches and expands upon some of the basic functions to optimize call center efficiency and meet the needs of your particular call center.

Sage CRM & Sage Timberline Office Integration

CRM Integration gives access to all essential Sage Timberline Office information anywhere that Sage CRM access is available.

The Sage Timberline Office integration components automatically synchronize your Sage Timberline Office information from Address Book, Payroll and Property Management seamlessly through to the Company and People

tables in Sage CRM. All contact information stored in Sage Timberline Office is automatically uploaded into the Sage CRM database and then made available for easy tracking of all correspondence and the association of different correspondences with Project Management, Equipment Cost and Property Management.

Sage CRM presents data in similar formats to the Sage Timberline Office thick client software with improved drill-down in many areas. All on-screen lists and form designs can be modified to suit your company's needs via a simple customization interface that you can make available to selected users using the Sage CRM advanced security system.

Views are available for all the modules in the Sage Timberline® Office suite and feature powerful communication and management tools provided by Sage CRM.

Your AR customers for example, are accessible using Sage CRM search functions. The Sage CRM integration can be customized to allow users to drill-down to view customer invoices and receipts via hyperlinks on customers' current and aged account balances. Another Sage CRM feature, the management Dashboard, shows a customizable set of content relating to you, the user. You decide what data will be shown. For instance, it could include a list of your most recently viewed companies or color charts that give a snapshot view of key accounting data from Sage Timberline Office.

The screenshot displays the Sage CRM interface within a Microsoft Internet Explorer browser window. The address bar shows the URL: http://cmtest/crm/eware.dll/go. The page header includes the Sage CRM logo and company information: Grocer's Association, Phone: (503)987-5687. A navigation menu is visible at the top, and a sidebar on the left contains various icons for navigation. The main content area is titled 'Customer Summary' and contains a table of financial data. Below this, there is a 'Customer Billings' section with a table showing 14 records found, page 1 of 2. The tables include columns for Invoice Type, Invoice Date, Contract, Description, Amount, Job, Retention Held, Retention Billed, Draw, and Reference.

Address Type	Invoice	Invoice Date	Contract	Description	Amount	Job	Retention Held	Retention Billed	Draw	Reference
Cash receipt	010010000003	3/31/2001	0300100	April Payment	-	03-001	0.00	0.00	010010000003	
Cash receipt	010010000001	1/31/2001	0300100	Jan Payment	100,000.00	03-001	0.00	0.00	010010000001	
Cash receipt	010010000001	1/31/2001	0300100	March Payment	-26,500.00	03-001	0.00	0.00	010010000001	
Cash receipt	010010000001	3/31/2001	0300100	May Payment	-50.00	03-001	0.00	0.00	010010000001	
Cash receipt		3/31/2001	0300100	May Payment	-114,740.00	03-001	0.00	0.00		
Cash receipt		2/28/2001	0300100	March Payment	-	03-001	0.00	0.00		
Cash receipt		4/30/2001	0300100	May Payment	117,000.00	03-001	0.00	0.00		
Cash receipt		4/30/2001	0300100	May Payment	-85,260.00	03-001	0.00	0.00		
Cash receipt	010010000001	1/31/2001	0300100	January	28,500.00	03-001	0.00	0.00	010010000001	

THE BILLING SCREEN INSIDE SAGE CRM SHOWS SUMMARY AND DETAIL INFORMATION COMING FROM THE ACCOUNTS RECEIVABLE MODULE IN SAGE TIMBERLINE OFFICE.

The Sage Timberline Office integration components also provide facilities for securing your data. Job Cost and Equipment Cost records can be assigned to individuals and teams and these assignments can be used to secure which records can be seen and reported on by which operators.

Security for Sage Timberline Office information is controlled on a per module security matrix. Individual users can be excluded from specific types of information such as AP vendor invoices or AR invoices and aging.

The following screenshots provide more examples of how the Sage CRM integration can provide instant access to data stored in any of the modules across the Sage Timberline Office suite.

Job Information

Simply select a Job from the Find Jobs function access to job data. As well as job summary information, additional tables in the same view present all the extras attached to the job. Drill down functionality is provided via hyperlinks on the Cost Codes so that users can access the details of transactions comprising Total Estimates, Revised Commitments and Job to Date Costs.

Vendor Invoices

Sage CRM has a powerful search capability which makes it simple to view vendor invoices in a few clicks without even having to open up a separate AP module.

Simply enter the first few letters of the vendor's name in the Company Search field to view a list of all companies that fit your search criteria. From the table showing summary contact information, it's easy to find your vendor and bring up their complete record via a hyperlink.

Finally, just select the Vendor Invoices tab to view a complete list of the vendor's invoices. Select an invoice to view invoice summary information and distribution details in the same view.

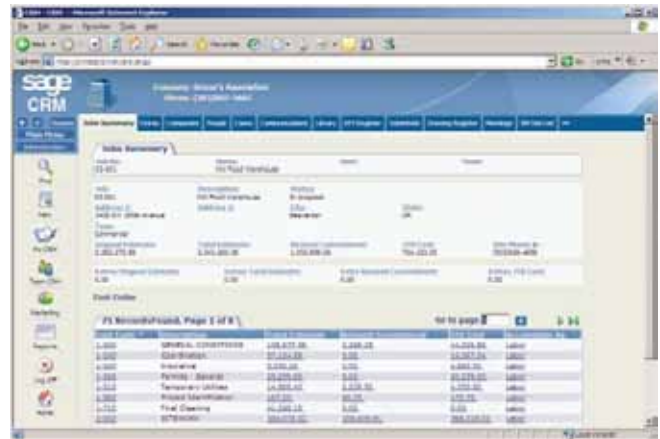
Additional drill down is supplied via a hyperlink on the Amount Paid for each distribution to view payment details.

Property Management

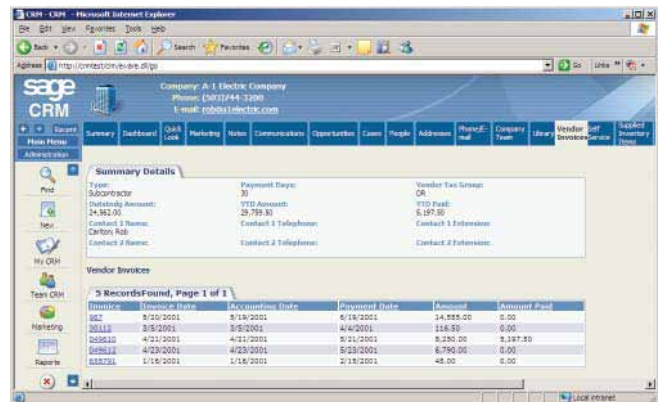
Tenant information from Property Management is automatically synchronized into the Sage CRM dataset making Sage CRM the ideal environment to follow-up outstanding charges and track maintenance issues.

Service Management

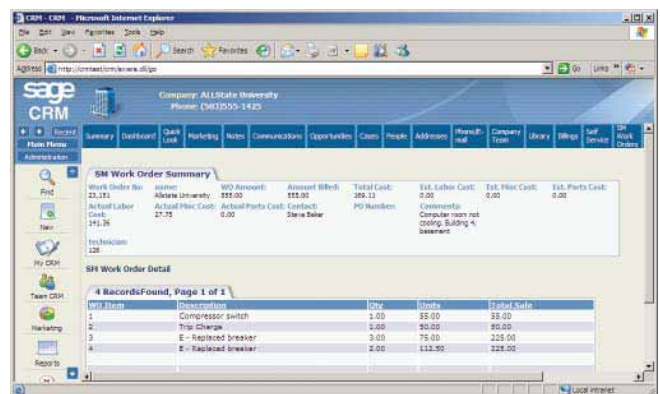
The Sage CRM integration components provide direct access to Service Management Work orders and invoices from the company record.



JOB COST INFORMATION



VENDOR INVOICES FROM ACCOUNTS PAYABLE



SERVICE MANAGEMENT WORK ORDER INFORMATION



SAGE TIMBERLINE OFFICE | SAGE CRM

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