



CL200

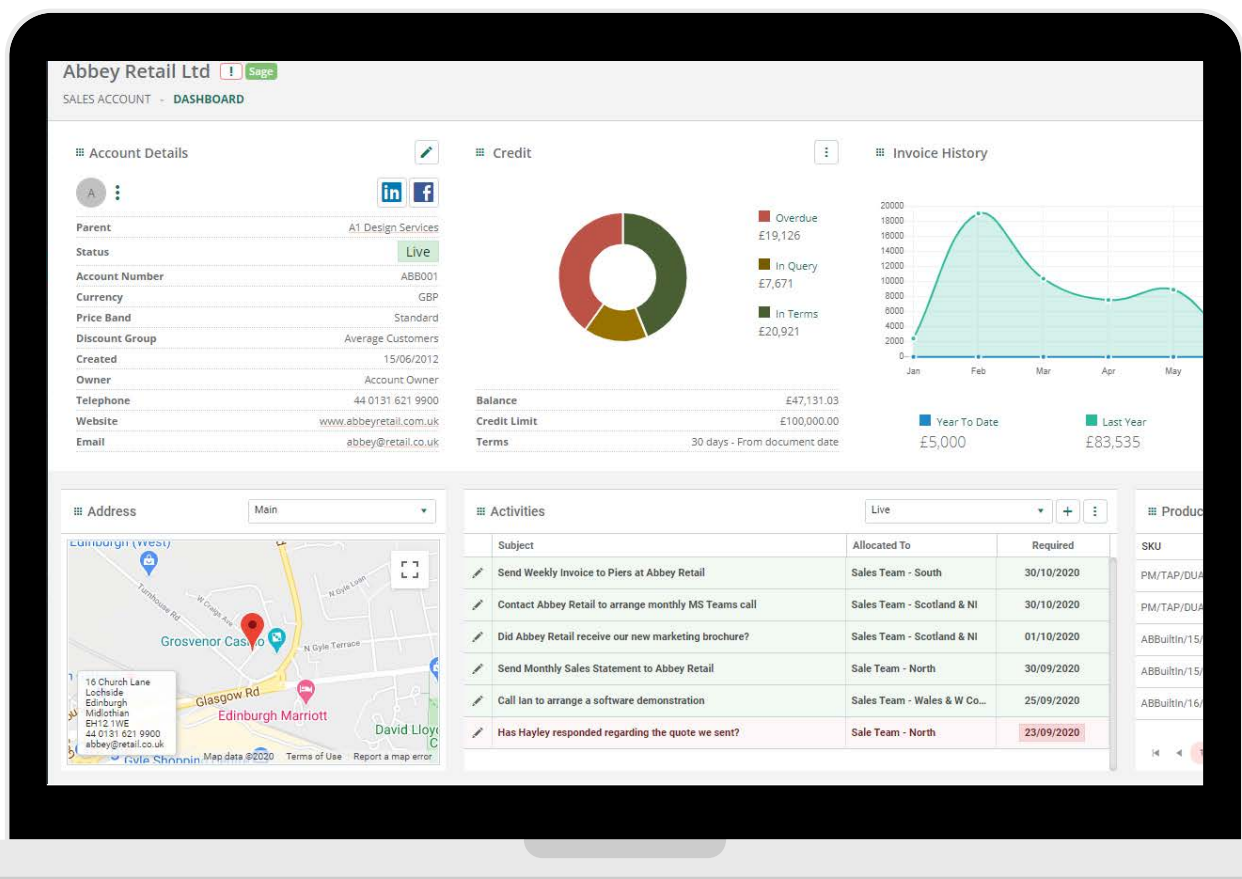
Enhancing Customer Relationships



Data Viewer, Task Manager & CRM
for Sage 200

A NEW VIEW OF SAGE 200





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05 Sage 200 Integration

Open up a new view of your Sage 200 data, with real-time visualisation.

CL200 introduces an intuitive business solution that integrates seamlessly with Sage 200.

07 Task Management

Never miss a deadline. Schedule and allocate tasks and activities.

This centralised tool allows your team to collaborate effectively with shared files, view live account data, manage scheduled tasks and nurture your valuable prospect, customer and supplier relationships.

09 Prospect Tracking

Manage your sales pipeline and nurture your prospects.

Dynamic dashboards display real-time business intelligence. With one click you can drill down to access customer quotes, invoices and order history, allowing anyone to instantly answer incoming queries.

11 Exceptional Experience

Designed for simplicity, your users will find it easier to support your customers.

With no complex onboarding or steep learning curve, deployment is quick, painless and cost effective.

13 Empower Your Team

See how CL200 opens up a whole new view of your Sage 200 data.

Designed to focus on your core tasks, you avoid paying extra for CRM tools that remain unused.

With its responsive design and simple interface, your whole team can be fully up and running from day one, working from any location, at anytime, on any connected device.

A woman with long brown hair, wearing a white button-down shirt, is shown from the waist up, looking upwards and to the right with a thoughtful expression, her hand resting on her chin. She is positioned in front of a dark chalkboard background filled with various hand-drawn white business charts and graphs. These include bar charts, line graphs, pie charts, and arrows indicating growth. A semi-transparent grey banner is overlaid across the middle of the image, containing the main text.

POWER UP YOUR SAGE 200

**CL200 opens up access to real-time account data
to put your customers front and centre**



CL200 is a user friendly Data Viewer, Task Manager and CRM. It integrates with Sage 200 to give you oversight of your account data like never before.

SAGE 200 INTEGRATION

Discover New Business Insights

- A single data source means no more redundant databases showing different account information
- Speed-up customer service by storing account records centrally
- Enhance your interactions with a comprehensive communication history
- Track and allocate everyday tasks and activities, so you never miss an opportunity
- Create simplified workflows to increase your organisational efficiency
- View your company info at a glance with dynamic dashboards showing live data including Debtors, Invoice History, Notifications and Sales Pipeline

Real Time Data

CL200 shares live Sage 200 data, instantly showing you account and transaction history in real-time. No import or export and no overnight synchronisation is required.

Secure User Authorisation

You control and authorise any number of users to view your Sage 200 data. No additional Sage licences are required, saving you extra costs. For added peace of mind, access is achieved through a secure ISO27001 environment within Microsoft Azure's cloud.

Up and Running in Quick Time

Without the need for any third party connectors or complex onboarding, installation and usability is achieved simply, quickly and cost effectively.

“Having visibility of our customer accounts in once place has improved our service”
HARVEST HEALTHCARE

NEVER MISS AN OPPORTUNITY

Schedule and respond to tasks and activities
from anywhere at anytime





TASK MANAGEMENT

Create Activities

CL200 has a powerful yet simple-to-use Task Manager. Users can enter Activities, including Enquiries, Meetings, Calls, Quotes and Follow-ups.

Never miss a deadline. Post calendar reminders directly into your Outlook 365 schedule.

Always pick up where you left off thanks to the conversation history, showing date and timestamped notes on each Activity.

Schedule Tasks

Start each day organised. Upcoming Activities are visible the minute you log in.

Lists can be filtered to individual preferences, to fit the way you work. Senior Leaders benefit from greater visibility to view all Activities, by teams or individuals, or by Sales, Purchase or Prospect Account.

Allocate Workflow

No more un-actioned tasks. Activities can easily be re-allocated to other CL200 users or to a different department to follow your business workflow or to cover a team member's absence.

Increase Productivity

Non-Sage users can view Sage 200 data in a clear and simple web interface on any device.

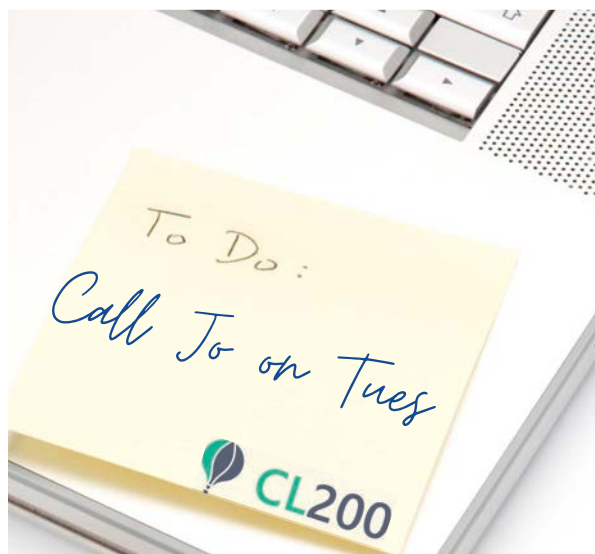
View, allocate and manage scheduled activities to ensure you never miss a task, no matter where you are working from.

“

CL200 is very easy to use, unlike complex CRM systems. It has been extremely useful to be able to access Sage data (without an additional licence).

ADAM HEMMINGS, DYNAMIC OFFICE SEATING

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GROW YOUR BUSINESS
Nurture your prospects



PROSPECT TRACKING

Lead Nurturing & Pipeline Management

Power up your Sage 200 data with the added benefit of CL200's Pipeline Management.

Never lose track of another lead. Upload existing prospect lists individually or in bulk.

Once uploaded, allocate the leads to your CL200 users and start nurturing your business relationships.

Sage 200 Quote Integration

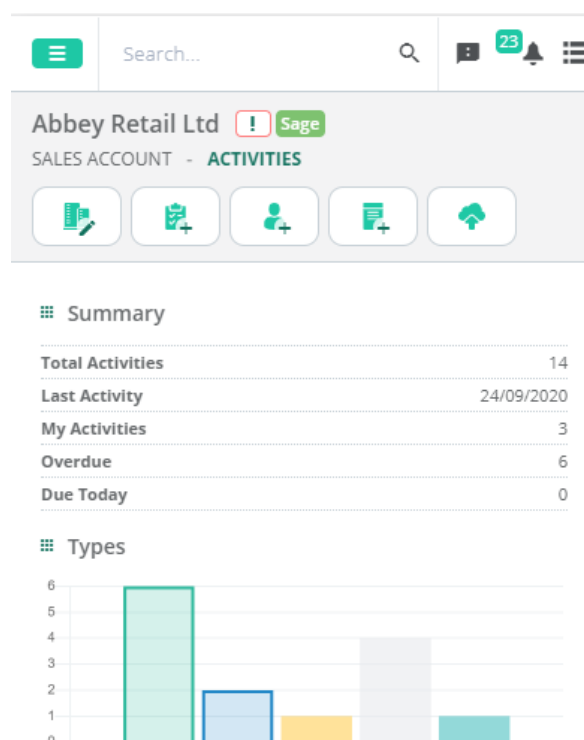
By automatically including your Sage 200 quotes, CL200 gives you the freedom to nurture all your leads in one central place, presenting a clear holistic view of your entire sales pipeline at a glance.

ANALYSIS

Customised Analysis & Segmentation

CL200 gives you the flexibility to categorise your data any way you want. Analysis codes allow smart segmentation and filtering of your accounts and activities.

You can customise your analysis codes with any labels, like industry type, territory, region, sales person, lead source, prospect scoring, pipeline stages or anything you want to report on for different areas of your business.





BUILT FOR USABILITY

Intuitive and responsive design means you're up and running from day one

EXCEPTIONAL EXPERIENCE

- Low total cost of ownership (TCO) due to no CapEx and minimal monthly expenditure
- High return on investment (ROI) with rapid setup and no lengthy onboarding
- No long term commitment, simple rolling monthly agreement with no tie-in

Spend Less Time and Expense on Unused Tools and Features

CL200 represents remarkable value. With no requirement for upfront capital expenditure and no long term commitment, CL200's low cost rolling monthly subscription gives you a high return on investment (ROI) with no tie-in. You have nothing to lose.

Value is enhanced for Sage 200 sites through CL200's integration, allowing non-Sage users to view Sage 200 data without the expense of additional Sage licences.

Built on the core essentials, CL200 is not cluttered with expensive features that will never be used, making it an invaluable tool to boost your Sage 200 functionality.

Prioritise Your Customer and User Experience

CL200 is designed to be frustration free. With no steep learning curve or overwhelming features, your users are assured easy adoption and rapid implementation.

CL200 instantly empowers your frontline team to see real-time Sage 200 data. When a customer calls, you eliminate delays retrieving account information. No more redirecting queries to your busy finance department.

Users can configure column views, re-order and sort to suit their individual preferences.

CL200's responsive design is mobile friendly, serving your customers from anywhere, at anytime, on any device.





FRONT LINE STRENGTH

Respond to customer queries faster with direct access to quotes, invoices and order history



**CL200
OPENS UP A
WHOLE NEW
VIEW OF
SAGE 200**

WHEREVER YOU WORK

Now more than ever we need to be able to connect to our company, our employees and our customers from wherever we are.

CL200 delivers a connected experience allowing you to collaborate effectively no matter where your team is.

Whether you are working in the office, on the road or at home, CL200 enables your workforce to efficiently manage tasks and securely access customer accounts, quotes, orders and invoices from any location.

Enhance your customer relationships with CL200 and deliver great customer service from wherever you work.



CL200

Make light work of your busy schedule



BENEFITS SUMMARY

CL200



Sage 200 Integration: Enables non-Sage users secure access to Sage 200 data

Account Access: View accounts, quotes, orders and invoices

Quick Setup: Rapid installation and deployment

Authorised Access: Approve selected users, keep your data safe and secure

User Friendly: No lengthy onboarding or steep learning curve

Easy Migration: MS Excel import and export of bulk records to organise your data

Task Manager: Create activities and follow-ups to improve customer service

Team Collaboration: Centralised account information and shared document library

File Attachments: Upload documents, attach and store to any Account

Intuitive Dashboards: Live visualisations display your current position at a glance

Company Oversight: Dashboard views of Debtors, Invoice History, Sales Pipeline

Customisable Views: Configure and sort columns to suit individual user preference

Lead Nurturing: Prospect Entry and Tracking for managing your Sales Pipeline

Account Flagging: Add pop-ups and alerts on accounts to highlight critical data

Google Maps: See maps of Account addresses to visualise location details

Microsoft 365: Send emails and create calendar entries in Outlook 365

Responsive Design: For mobile devices, work anywhere at anytime

Marketing Wave: Simple functionality for uncomplicated campaigns

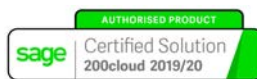
ISO27001 Security: Hosted in a secure Microsoft Azure environment



**For a free demonstration,
contact your Sage Partner**



Paradise
I.T. FOR BUSINESS



**Microsoft
Partner**

Gold Cloud Platform
Silver Application Development
Silver Small and Midmarket Cloud Solutions

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