



CL200

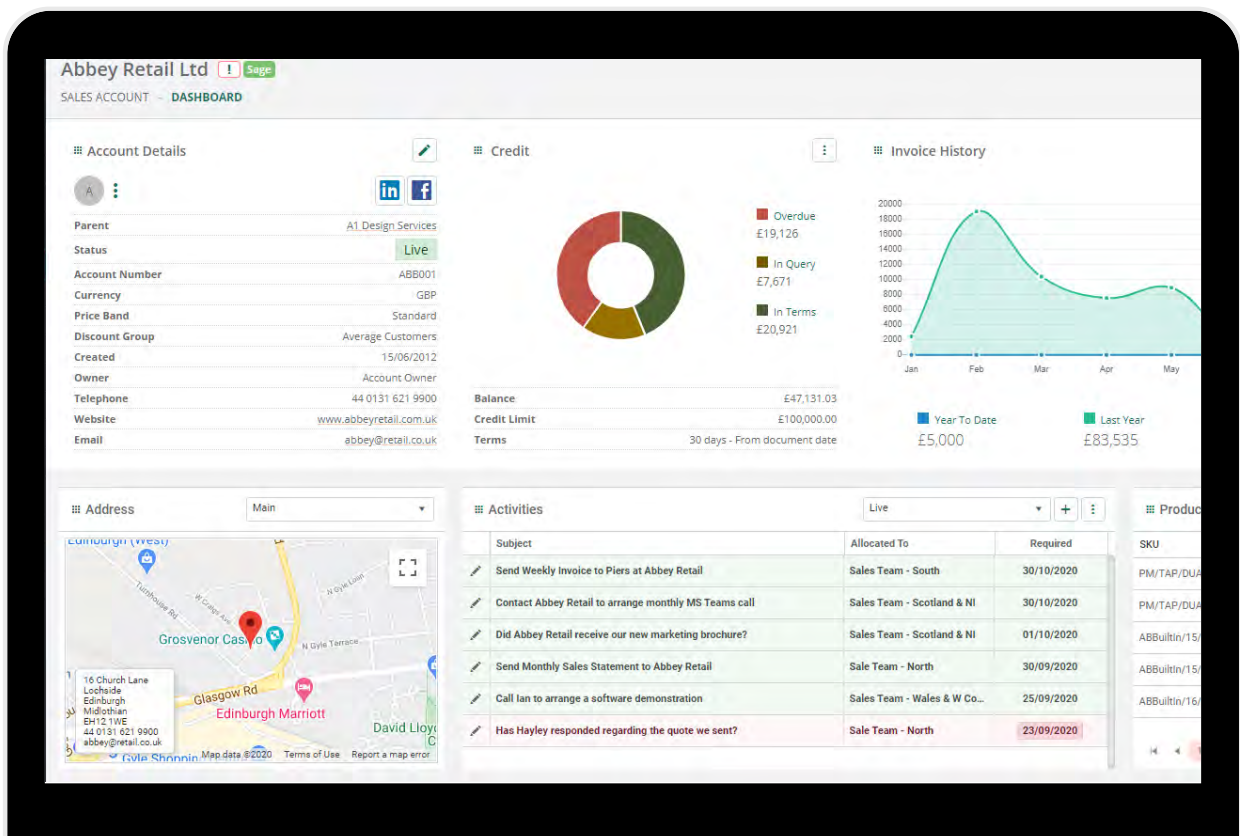
CONNECT LIVE TO SAGE 200



Data Viewer & Task Manager for Sage 200

A NEW VIEW OF SAGE 200





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Sage 200 Data Viewer

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

Optimise your valuable Sage 200 information with this easy-to-use Data Viewer and Task Manager. CL200 allows all your staff to view your Sage 200 Professional data in real-time.

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Task Management

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

This centralised tool allows your whole team to collaborate effectively with shared files, view live Sage 200 account data, manage scheduled tasks and nurture your valuable prospect, customer and supplier relationships.

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Prospect Tracking

Manage your sales pipeline and nurture your prospects.

Dynamic dashboards display real-time business intelligence. With a simple click you can drill down to access customer invoices and order history, without the need for additional Sage 200 licenses.

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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.

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Empower Your Team

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

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 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. The background is a dark chalkboard filled with various hand-drawn white business charts and graphs, including bar charts, line graphs, pie charts, and arrows, creating a professional and analytical atmosphere.

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 and Task Manager. Connect live to Sage 200 and gain instant oversight of your account data like never before.



SAGE 200 DATA VIEWER

Discover New Business Insights

- Open quotes, orders and invoices, previously only accessible by Sage users in your finance team
- Speed-up customer service by storing account records centrally
- A single data source means no more redundant databases showing different account information for prospects, customers and suppliers
- View your company info at a glance with dynamic management dashboards showing live data including Turnover, Debtors and Creditors, Invoice History, Notifications and Sales Pipeline

Real-Time Data Integration

CL200 shares live Sage 200 data, instantly displaying account and transaction history in real-time. No import or 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

Manage Activities

CL200 has a powerful yet simple-to-use Task Manager to track and allocate everyday tasks and activities, so you never miss an opportunity. You can enter Activities such as Enquiries, Meetings, Calls, Quotes and Follow-ups.

Increase Productivity

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

Allocate Workflow

No more un-actioned tasks. Activities can easily be re-allocated to individual teammates or to different departments to follow your business workflow or to cover a team member's absence.

Personalise Your View

Start each day organised. Upcoming Activities are visible as soon as you log in.

Lists can be filtered to individual preferences, to fit the way you work. Managers can see all Activities by team or individual, or by Sales, Purchase or Prospect Account.

“

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

”





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 imported, allocate leads to your CL200 users and start nurturing your business relationships.

Easily view your customers order history, see the number of times an individual product has been ordered and total value over the last two years. Find patterns in buying behaviour and product popularity.

Sage 200 Integration

By automatically including your Sage 200 information, 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.

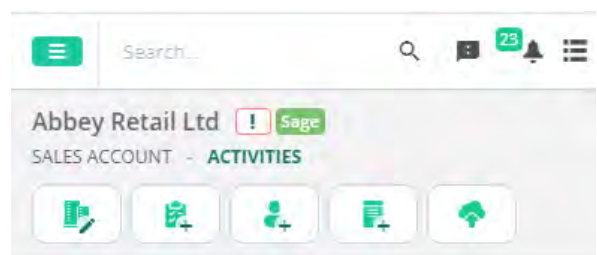


ANALYSIS

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. Create labels for anything you want to report on for different areas of your business.



Summary

Total Activities	14
Last Activity	24/09/2020
My Activities	3
Overdue	6
Due Today	0

Types





BUILT FOR USABILITY

**Intuitive and responsive design.
Access live Sage data from anywhere.**

EXCEPTIONAL EXPERIENCE

- Low total cost of ownership (TCO) due to minimal expenditure
- High return on investment (ROI) with rapid setup and no lengthy onboarding
- A natural extension to Sage 200, allowing ALL your staff access to live Sage data

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 also have the choice of purchasing a perpetual licence.

Value is enhanced with Sage 200 integration, allowing non-Sage users to view Sage 200 data without the expense of additional Sage licenses.

Unlock Your Company's Potential

Boost your Sage 200's functionality and unlock data for your whole company. Built on the core essentials, CL200 is not cluttered with complex features that will never be used, making it an invaluable tool for companywide use.

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 need to keep redirecting queries to your busy finance department.

Easily configure columns, re-order and sort views to suit your individual preferences.

CL200's responsive design is mobile friendly, allowing you to serve your customers from anywhere, at anytime, on any device.





FRONTLINE 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

There has never been a better time to connect with your company, your employees and your customers.

CL200 delivers a connected experience allowing you to collaborate effectively no matter how remote 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 Professional

Live Data Access: View Sage 200 accounts, orders and invoices in real-time

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: Centralise your 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

Customer Insight: See order history over last two years and product buying behaviour

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: Designed to be mobile friendly, work anywhere at anytime

ISO27001 Security: Hosted in a secure Microsoft Azure environment



CL200

For a free demonstration,
contact your Sage Partner



 **Paradise**
I.T. FOR BUSINESS

 **sage** Partner
Developer
2018/19

 **sage** Certified Solution
200cloud 2019/20

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

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