

Sage ERP Africa customises for Bankserv



Customer

Bankserv

Industry

Finance and banking

Location

South Africa

Solution

Sage CRM and
Sage ERP 300

The South African Bankers Services Company Ltd (Bankserv) recently completed a Sage 300 ERP, Sage CRM and Pacific Purchasing Workflow implementation with Sage ERP Africa. Faheema Maiter, financial accountant at Bankserv, says the solution met the company's expectations and has enabled them to streamline the procurement procedure, as well as support the company's everyday business management needs and growth plans.

"Bankserv had very specific requirements and needed a customised BEE solution that would integrate with the Sage 300 ERP financials. This would enable us to establish what our BEE spend was at any given time of the month," says Maiter. She says the solution was further complicated by a remote server and the fact that several acquisitions were processed during the period.

The implementation of Sage 300 ERP, Sage CRM and Pacific Purchasing Workflow was a fantastic solution. Maiter says the company has a best of breed ERP solution tightly integrated with a good CRM system and a superb requisitioning program. "Pacific Purchasing Workflow provides an easy-to-use requisitioning program, and a powerful, configurable workflow engine that supports many of the workflows and controls that we require."

Product knowledge, according to Maiter, is one of the keys to implementation success, and Sage 300 ERP is the perfect fit for Bankserv. This edition provides advanced inventory, purchasing, and order management with up to 10 GL account segments, unlimited account structures, 99 years of financial history, and the ability to manage an unlimited number of concurrent users and companies.

'I have been a Sage 300 ERP customer for over two years and am very happy with the performance of the product and its people.'

Faheema Maiter,
Financial Accountant
Bankserv

Challenge

Bankserv needed a customised solution that would integrate with Sage 300 ERP and support their everyday business management needs and growth plans.

Solution

The implementation of Sage CRM and Sage 300 ERP gave Bankserv the powerful and configurable workflow engine and controls that they needed whilst remaining an easy-to-use system.

Results

The solution met the company's expectations and has enabled them to streamline their procurement procedure, as well as support the company's everyday business management needs and growth plans. The ability to manage an unlimited number of concurrent users and companies has made the integrated solution everything Bankserv wanted and more.

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Faheema Maiter,
Financial Accountant
Bankserv

Being competitively priced was another advantage. Bankserv will remain a happy customer using the suite of Sage products. Sage CRM is a completely web-based, affordable and expandable business management solution for medium-sized accounting environments. It offers powerful analysis and reporting tools and a robust accounting feature set complete with operations management capabilities. It is everything Bankserv wanted and more.

Maiter reiterated that the customisation of the tool, product knowledge and customer support all assisted in a very successful implementation.

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About Sage CRM

Over 14,000 small and medium sized companies across the globe use Sage CRM every day to accelerate sales, drive business productivity and make every customer interaction count. It is used by enterprising, growing companies seeking new ways to interact with customers, leverage the power of social media and take advantage of the latest mobile developments to further grow their business. When combined with Sage ERP, our customers enjoy better business insight, increased efficiencies and productivity, and gain a single, customer-centric view across their entire business. So whether you're just starting out or have already grown to several hundred employees, Sage CRM can help accelerate your business success.

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