



Your business in mind.



# SAGE CRM SALESLOGIX

# WHAT'S NEW IN v7

- SALES
- MARKETING
- CUSTOMER SERVICE
- SUPPORT
- MOBILE

Sage CRM SalesLogix is the customer relationship management solution that enables small to mid-sized businesses to cultivate profitable customer relationships by increasing sales and marketing performance and maximizing customer satisfaction and loyalty.

Sage CRM SalesLogix v7 provides exciting new capabilities across the product suite including interactive dashboards, integrated service and support, and full-featured mobile support, with enhancements designed to increase productivity and maximize customer satisfaction and loyalty.

### UPGRADE TODAY!

For more information about Sage CRM SalesLogix v7:

- Contact your certified Sage CRM SalesLogix Business Partner, or
- Call **866-674-5588** to speak to a Sage CRM SalesLogix representative, or
- Visit [www.saleslogix.com/whatsnew7](http://www.saleslogix.com/whatsnew7)



View performance metrics, diagnose key issues, and identify opportunities from a single location with Sage CRM SalesLogix Dashboards.

### INTERACTIVE DASHBOARDS

#### Real-Time Interactive Dashboards

- Gain deep insight into organizational and individual performance via interactive dashboards
- View performance metrics, diagnose key issues, and identify opportunities from a single location
- Analyze key performance metrics such as pipeline status, open opportunities, and win rate
- Identify top customers and opportunities
- Discover root causes for performance issues and take corrective action
- Perform ad-hoc analysis by simply changing filter or group criteria

#### Drill-down Analysis

- Drill down into detailed data for further analysis into trends
- Export data to Excel for further analysis
- Conduct historical and comparative trend analyses, such as period-to-date and year-to-year
- Manage your calendar, tasks, and activities directly within the dashboard
- Personalize dashboard content so each user gets exactly the information they need
- Drag-and-drop to view different dashboard performance metrics
- Create customized dashboard content

### FULL-FEATURED MOBILE CRM

#### Full-Featured CRM on a Handheld Device

- View and update contact, account, and opportunity information and related notes and history
- Schedule and track activities with a visual drag-and-drop calendar
- Access sales opportunity information including products and pricing
- View related customer tickets and service history and access resolutions
- Perform lookups and create dynamic groups



### Robust Mobile Platform

- Deploy on popular Pocket PC and/or Blackberry mobile platforms
- Increase efficiency with one-click dialing and handwriting recognition
- Customize the mobile client using visual design tools
- Access tables, extensions, pick lists, and other customized fields in Sage CRM SalesLogix

### Multiple Synchronization Options

- Sync with one click: wireless, dial-up, or network connection through PC
- Sync to a Sage CRM SalesLogix Host Database or Remote Client
- Distribute data and application updates automatically to mobile devices

## ENHANCED MARKETING

### NEW Features:

#### Segmentation and Groups

- Deliver targeted marketing messages or sales offers to select customer segments
- Segment customer and prospect lists using user-friendly filtering tools

#### Lead Management and Qualification

- Import leads from web forms, tradeshows, seminars, or purchased lists
- Track leads at every stage, from lead through closed sale
- Create qualification checklists using criteria you define
- Click to convert qualified leads to new sales opportunities
- Merge duplicate leads with existing contacts and accounts

#### E-mail Marketing

- Execute e-mail campaigns using Mail Merge or integrated marketing service provider, EmPulse
- Automatically upload target lists directly into EmPulse
- Pre-populate EmPulse with your company templates and content
- Transfer EmPulse response data automatically into Sage CRM SalesLogix

Also includes the following existing marketing capabilities:

- Campaign Management
- Segmentation and Groups
- Web Lead Capture
- Workflow Automation
- Campaign Response Tracking
- Campaign Task Management
- Budget and Revenue Tracking
- Campaign Reporting (ROI)
- Marketing Resource Library
- Windows and Web Access

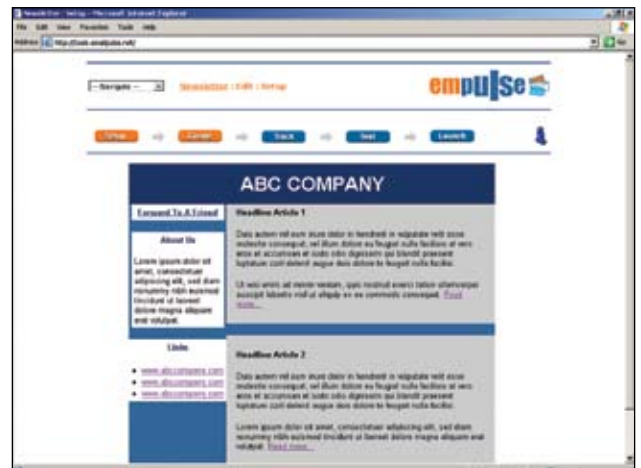
## PRODUCT BENEFITS

- Interactive Dashboards
- Full-Featured Mobile CRM
- Enhanced Marketing
- Integrated Service & Support
- Productivity Enhancements
- .NET Customization



Access critical customer information and productivity tools anytime, anywhere, through both Pocket PC and Blackberry devices.

Execute e-mail marketing campaigns with EmPulse, an integrated marketing services provider. E-mail response data is automatically transferred to Sage CRM SalesLogix.



## INTEGRATED SERVICE AND SUPPORT

### NEW Features:

- Support features are now delivered through the Sage CRM SalesLogix client
- Specify and view which Assets are included in a service contract
- Track additional Defect details including problem type, version found, and source
- View Defects and Returns associated with a specific Account or Ticket
- Track all details throughout the lifecycle of a Return
- List and group Returns with 1-click export to Excel
- Track detailed Asset information such as serial #, quantity, and sales order #
- Associate Assets with Accounts, Tickets, Defects, Contracts, or Returns

Also includes the following existing service and support capabilities:

- Account and Contact Management
- Ticket Management
- Service Contract Management
- SpeedSearch/Knowledge Base
- Defect Management
- Returns
- Standard Problems and Resolutions
- Asset Management
- Sales and Support Integration
- Reporting
- Lookups and Groups
- Notification and Alerts
- Web Customer Portal

## PRODUCTIVITY ENHANCEMENTS

### User Enhancements

- Benefit from Windows XP theme support for consistent look-and-feel across all applications
- Access commonly used functions on the Navigation Bar, now grouped by role
- Utilize enhanced SpeedSearch to quickly search across all Activities, History, and Notes
- View and confirm unconfirmed activities from within the Calendar view, updated to match the familiar Outlook calendar style
- Copy a URL-like link of any Sage CRM SalesLogix record to the clipboard and simply paste into an e-mail, enabling another user to quickly access the same record with one click
- Move complete Contact records when a contact has moved to a new account or subsidiary or was incorrectly created under the wrong account
- Manage all Activity Reminders and Alarms through a single interface, including ignore, reschedule, complete, delay/snooze, and cancel capabilities
- Produce reports with the improved Crystal Reports XI R2
- Automatically convert previous Sage CRM SalesLogix reports
- Control report output through easily defined filters, including existing dynamic groups

### Administrator Enhancements

- Reduce deployment time upgrading from Sage CRM SalesLogix v6.2 with no need to cut remote databases
- Utilize the enhanced Import Wizard with easier field mapping, custom scripting, duplicate checking, and import preview and testing
- Automate deployments with an MSI compliant install and Install SDK
- Install remote databases quickly with a single-click executable
- Synchronize remote changes with a secure Internet-based sync option (HTTPS)
- Perform database maintenance with the customizable Integrity Checker, including finding, reporting, and fixing database issues

### Developer Enhancements

- Enable non-Sage CRM SalesLogix tables and views, maintaining security and synchronization
- Add custom fields to core database tables
- Customize the Activity, Report Manager, and Attachment interfaces
- Control Main View middle and tabs pane properties such as size, tab order, and tabs displayed
- Troubleshoot and optimize application performance with the SQL Profiler
- Extend or override current Account level security with a security programming interface
- Apply development changes to production quickly and easily with integrated Bundler and Architect projects

## .NET CUSTOMIZATION

- Customize and extend Sage CRM SalesLogix using .NET capabilities and tools
- Develop in Visual Studio.NET and add as native plugins in Sage CRM SalesLogix Architect
- .NET Forms can be used on Main Views, dialogs, or tabs



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# Sage CRM SalesLogix

What's New in v7

## About Sage CRM SalesLogix

Sage CRM SalesLogix is the customer relationship management solution that enables small to midsize businesses to cultivate profitable customer relationships by increasing sales and marketing performance and maximizing customer satisfaction and loyalty.

Designed to meet the distinct needs of small to midsize businesses, Sage CRM SalesLogix delivers integrated Sales, Marketing, Customer Service, Support and Mobile automation solutions that adapt to your unique customer acquisition, retention, and development processes.

Sage CRM SalesLogix provides a complete CRM solution with low cost of ownership, rapid time to productivity, and high return on investment. Flexible and easy to use, Sage CRM SalesLogix readily accommodates growth and changing business requirements.

Sage CRM SalesLogix, the SMB CRM leader with more than 7,300 customers worldwide, is part of the Sage Software family of integrated business management solutions.

## About Sage Software

Sage Software offers leading business management software and services that support the needs, challenges, and dreams of more than 2.5 million small and midsize business customers in North America. Its parent company, The Sage Group plc (London: SGE.L) supports 4.7 million customers worldwide. For more than 25 years, Sage Software has delivered easy-to-use, scalable and customizable software for accounting, customer relationship management, human resources, time tracking and the specialized needs of accounting practices and the construction, distribution, manufacturing, nonprofit and real estate industries. For more information, please visit the Web site at [www.sagesoftware.com](http://www.sagesoftware.com) or call **866-308-2378**.

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