



# SalesLogix

## Customer Service Datasheet

**Sage SalesLogix Customer Service is a module within the Sage SalesLogix customer relationship management (CRM) application. Other modules include Support, Sales, and Marketing. Sage SalesLogix also supports Mobile users.**

### Track and Resolve Customer Questions, Issues, and Requests

Sage SalesLogix Customer Service provides the advanced issue tracking and resolution tools needed to quickly resolve customer questions, issues, and requests and deliver a high-quality customer experience. Each service ticket created contains detailed information including a unique ticket ID number, contact info, type, status, urgency, assignment, date required, and service contract details.

From within a ticket, employees can search for solutions or schedule activities (phone calls, meetings, or to-dos) to follow-up on open issues. Service reps can also easily communicate with customers by sending email with attachments such as white papers, quotes or product info. Tickets are associated with Accounts and Contacts, so a record of all service interactions, past and pending, is maintained in Sage SalesLogix and can be viewed by employees from across your organisation.

### Find Critical Information and Resources Quickly

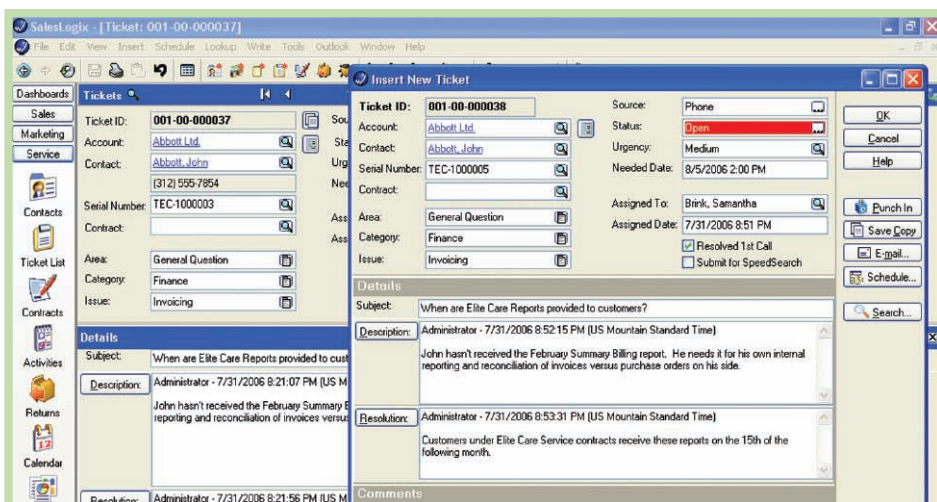
SpeedSearch, the powerful knowledge base search engine in Sage SalesLogix, helps service professionals quickly locate resolutions to customer issues. Service reps can search prior tickets, attachments, procedures, activities, and notes, as well as reference materials such as online manuals, FAQs, and white papers. In fact, an advanced keyword search can be run against any information in Sage SalesLogix or on a shared network directory.

With SpeedSearch, service reps can scan search results rapidly and efficiently, due to advanced filtering, scoring, sorting, and preview capabilities. When the desired resolution is identified, service reps can populate it into the ticket, communicate it to the customer, and record it in the account history with only a few clicks. When successful new resolutions are identified, employees can easily input and submit them to the knowledge base for future reference.

### Features at a glance:

Sage SalesLogix Customer Service delivers powerful issue tracking and resolution tools to maximise customer satisfaction and loyalty.

- Ticket Management
- Service Contract Management
- SpeedSearch/ Knowledge Base
- Advanced Outlook Integration
- Lookups and Groups
- Activities and Communications
- Reporting
- Notification and Alerts
- Web Customer Portal
- Back-Office Integration
- Integrated CRM Benefits
- Configuration and Workflow



Create service tickets quickly, and automatically assign them to the appropriate resource based on area and level of expertise.

## Benefits

- Resolve customer questions, issues, and requests quickly for a high quality customer experience.
- Retain critical intelligence to increase departmental effectiveness and customer satisfaction.
- Provide convenient self-service solutions to customers.
- Share information captured at all points of interaction for an holistic customer view.
- Identify potential for new selling opportunities.

\*Sage E-Marketing is an optional component.

## Manage for Maximum Productivity

The reporting capabilities in Sage SalesLogix Customer Service help managers capture and analyse customer service metrics to assess team effectiveness. Managers can view call turn-around time, first-call resolution percentage, issue totals by category, escalation history, unresolved issues, and a weekly recap.

Sage SalesLogix automatically tracks time spent resolving individual issues, based on when users “punch-in” and “punch-out” of individual tickets. Sage SalesLogix can also monitor tickets proactively based on business criteria you define, and send automatic alerts when service conditions occur such as overdue tickets, expiring service contracts, or issue escalations.

## Help Customers Help Themselves

Sage SalesLogix helps reduce costs while empowering customers to find the answers they need – online, at their convenience. With the Sage SalesLogix Web Customer Portal, customers can view, add or edit tickets, and submit comments or attachments. The Web Customer Portal puts the same resource and intelligence used by your service professionals on your Web site, along with powerful search technology that simplifies the self-service experience.

## Integration for a Complete Customer View

Sage SalesLogix integrates with leading back-office applications so service reps can access key customer information such as credit status, balance, and terms, as well as reference prior orders, invoices, payments, and shipping info. Service professionals can also view current product information, pricing, and discounts to capitalise on potential cross-sell and up-sell opportunities when interacting with customers.

Sage SalesLogix Customer Service is highly flexible and can be tailored to work in concert with your existing business processes. And because Sage SalesLogix captures information from all points of customer interaction, employees from Sales and Marketing to Service and Support benefit from a holistic view of every customer.

The screenshot displays the Sage SalesLogix Customer Service interface. On the left, a navigation pane shows various modules like Sales, Marketing, Service, Contacts, Ticket List, and Reports. The main area shows a ticket for 'Abbot Ltd' with details such as 'Area: Hardware', 'Category: CD/DVD', and 'Issue: DVD Problems'. The 'Description' field contains a customer report about DVD drive issues. A 'SpeedSearch' window is open, showing search results for 'Office 2000 Install Error'. The results table lists several records with columns for Subject, Source, Created, Last Updated, and Keywords. The selected record shows a 'Standard Problem #00F8AA0004EN' with a relevance of 100. The 'Preview' pane shows the full text of the search result, including a resolution suggestion to update BIOS.

Search multiple resources, locate information, and communicate resolutions to customers quickly and efficiently with SpeedSearch.

# Features

## Ticket Management

- Track ticket ID, contact info, type, status, urgency, assignment, and date needed.
- Schedule phone calls, meetings, or to-do's to follow up on open issues.
- Automatically assign tickets to the appropriate resource based on area, skill, etc.
- Submit issue descriptions and resolutions for archiving in the knowledge base.

## Service Contract Management

- Track contract details such as service level, price, and time or cost amount remaining.
- Validate authorisations for specific services and log issues against a contract.
- Associate tickets with contracts to automatically update remaining balances.
- "Punch-in" and "Punch-out" automatically to track time spent on individual tickets.

## SpeedSearch/Knowledge Base

- Perform an advanced keyword search of any Sage SalesLogix table or shared network directory.
- Reference prior tickets, attachments, standard problems and resolutions, activities, and notes/history.
- Search reference materials such as online manuals, FAQs, or white papers.
- Scan search results efficiently with advanced filtering, scoring, sorting, and preview capabilities.
- Populate resolutions automatically into service tickets with one click.
- Archive approved resolutions in the knowledge base for future reference.

## Advanced Outlook Integration

- Manage contacts, email, and calendars using Microsoft® Outlook within Sage SalesLogix.
- Send email and attachments using Outlook and record to Sage SalesLogix activity history.

## Lookups and Groups

- Organise data sets by grouping similar records using advanced query tools.
- Perform temporary lookups or create groups for repeat access to groups of records.

## Activities and Communication

- Schedule and track phone calls, meetings, to-do's, events, and literature requests.
- Send email and attachments using Microsoft Outlook and record to customer activity history.
- Attach white papers, quotes, product info, and other resources from the library.

## Reporting

- Measure call turn-around time, first-call resolution percentage, and more.
- View issue totals by category, escalation history, unresolved issues, and a weekly recap.
- Capture data and analyse key customer service metrics to assess team effectiveness.
- Control access to reports, only distributing information to appropriate parties.

## Notification and Alerts

- Monitor data proactively and receive alerts when service conditions are triggered.
- Notify service managers of overdue tickets or escalated issues requiring attention.
- Alert customer service and support staff of expiring service contracts.
- Receive alerts instantly via email, fax, pager, PDA, phone, or Web browser.

## Web Customer Portal

- Empower customers to view, add, or edit tickets, and submit comments or attachments.
- Enable search capability of the same knowledge base that service reps use.
- Provide customers with convenient self-service solutions via the Web.
- Scan search results efficiently with advanced filtering, scoring, sorting, and preview capabilities.

## Back-Office Integration

- View accounting data such as credit status, activity, Accounts Receivable balance, ageing, and terms.
- Access current product information, inventory, pricing, and discounts.
- Reference orders, invoices, payments, and shipping info within customer records.

## Integrated CRM Benefits

- Arm sales reps with a history of their customers' service issues and details.
- Enable managers to view problem descriptions and follow-up with a call or letter.

## Configuration and Workflow

- Define user workflow options or grant ability to modify at user level.
- Automate user/date time stamps, ticket punch-in/out, ticket number, and assignment.
- Configure email workflow, escalation conditions, and notification routing.

# About Sage SalesLogix

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

Designed to meet the distinct needs of small to mid-sized businesses, Sage SalesLogix delivers integrated Sales, Marketing, Customer Service, Support, and Mobile automation software that adapts to your unique customer acquisition, retention, and development processes.

Flexible and easy to use, Sage SalesLogix readily accommodates growth and changing business requirements. It delivers deep, rich customisation capabilities, high levels of end-user adoption, and low total cost of ownership across all deployment methods including Web, Windows, and mobile devices.

With more than 300,000 users at over 8,500 companies worldwide, Sage SalesLogix is the leading CRM solution for small to mid-sized businesses and divisions of larger enterprises, and is part of the Sage family of integrated business management software.

## About Sage

Headquartered in Newcastle upon Tyne, Sage (UK) Limited is a subsidiary of The Sage Group plc, a leading supplier of business management software and services to 5.4 million customers worldwide.

From start-ups to larger organisations, Sage makes it easier for companies to manage their business processes.

Formed in 1981, the Group was floated on the stock exchange in 1989 and now employs 13,000 people in its market leading companies worldwide.

Working with its community of UK accountants, business partners, developers, banks and retailers, Sage is exclusively focused on providing UK businesses in all sectors with specific, scalable software and services to help them manage their finances, their people, their customers, their suppliers, their core operations and to plan their future business success.

In the UK alone, Sage employs over 1600 people and provides software and services to over 700,000 small and medium-sized businesses.

These products range from accounts, payroll, forecasting and business intelligence to customer relationship management, e-business and help for start-ups. Services include Excel Support, HR Advice, Health and Safety Advice and training courses.

For more information, please visit **[www.sage.co.uk/saleslogix](http://www.sage.co.uk/saleslogix)**

Alternatively, contact your certified Sage SalesLogix Business Partner.

To find a Business Partner in your area call **0845 111 9988** or email **[crm@sage.com](mailto:crm@sage.com)**

To register for an online demonstration to see how Sage SalesLogix can help your business, go to: **[www.sagecrmsolutions.com/demo/sagesaleslogix](http://www.sagecrmsolutions.com/demo/sagesaleslogix)**

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