



# SalesLogix

## Sales Datasheet

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

### A Single Source for Customer Information

Sage SalesLogix Sales provides the tools and resources needed to effectively manage all aspects of the sales cycle and increase team sales performance. It's a single repository for customer information captured across your entire organisation that enables you to access detailed account and contact information, track opportunities from lead through close, manage team calendars and activities, forecast revenue, and report on sales activities and effectiveness.

### The Information You Need, How You Need It

SalesLogix Sales provides you with the freedom of choice to select the deployment method best suited for your sales teams, without sacrificing functionality, usability, or robust customisation capabilities. Your teams can work online over a network or the Web, synchronise rapidly and work offline, or use a mobile device for quick access to customer information in the field. They can be more productive, as they always have access to the same key customer information.



### Features at a glance:

Sage SalesLogix Sales provides powerful sales automation and management tools to maximise sales performance.

- Account and Contact Management
- Opportunity Management
- Real-time, Interactive Dashboards
- Calendar and Activity Management
- Advanced Outlook Integration
- Sales Process Automation
- Sales Forecasting and Reporting
- Lookups and Groups
- Customer Communications/Mail Merge
- Competitor Tracking
- Literature Fulfillment
- Reference Library
- Territory Realignment
- Integrated Marketing, Customer Service, and Support
- Back-Office Integration
- Business Alerts/Notification
- Windows, Web, and Mobile

**Sage SalesLogix is organised and easy to use, putting the information and resources you need to close sales at your fingertips. This includes mobile access through both BlackBerry® and Microsoft® Windows Mobile devices.**

## Benefits

- Increase productivity by automating key aspects of the sales cycle
- Maximise team selling effectiveness with advanced sales tools and resources
- Make informed, profitable business decisions based on accurate visibility into the sales pipeline
- Customise to mirror unique business processes and to accommodate growth and change
- Integrate Sales with Marketing, Customer Service, Support, and Accounting for holistic customer account management

\*Sage E-Marketing is an optional component.

## Increase Sales Productivity and Performance

Sage SalesLogix Sales helps drive opportunities through the sales cycle by automating activities such as follow-up calls, letters, and literature fulfillment, based on sales and marketing processes you define.

Sales professionals can send personalised communications to individual customers or groups of prospects using customised HTML email templates. They can also track competitors and access the Sales Library for product specifications, FAQs, or marketing materials.

In addition, Advanced Outlook integration enables users to share contacts, send emails, and manage calendars using Microsoft Outlook from within Sage SalesLogix, and record the activity to the Sage SalesLogix account history.

## Insight for Informed Business Decisions

Sage SalesLogix Sales provides the insight for informed business decisions and the management tools to implement them. Access a real-time dashboard view of the sales pipeline in order to accurately analyse the revenue potential and probability of close in your sales pipeline. Segment your sales opportunities by account manager, region, or status. Use integrated Crystal Reports® to gauge individual or team effectiveness and guide territory realignment or redistribution of your marketing spend. Receive automatic alerts on pending sales opportunities based on business conditions you define.

## Truly Integrated CRM

Sage SalesLogix provides your sales team with a true 360-degree customer view, consolidating information from Sales, Marketing, Customer Service, and Support, so they can close more deals and increase customer satisfaction and retention.

Integration between Sage SalesLogix and your back-office accounting application provides your sales professionals with access to the most current product, pricing, discounts, and inventory information when creating quotes or taking orders. In addition, without having to leave Sage SalesLogix, they can view all relevant customer data, such as credit status, terms, and account balance so they can better service customers.



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

# Features

## Account and Contact Management

- Track all customer interactions and add files, notes, or literature requests
- Assign ownership, establish account hierarchies, and track lead sources
- Share information captured at all points of interaction for a complete customer view

## Opportunity Management

- Track probability of close, products, lead source, status, and competitors
- Generate sales proposals automatically reflecting native customer currency
- View Opportunity Snapshot and email key summary data to managers with one click

## Real-time Interactive Dashboards

- View performance metrics, diagnose key issues, and identify opportunities from a single location
- Analyse key performance metrics such as pipeline status, open opportunities, and win rates

## Calendar and Activity Management

- Manage schedules and track phone calls, to-do items, events, and literature requests

## 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 history

## Sales Process Automation

- Create custom processes based on product line, deal size, territory, or lead type
- Automate sales activities and assign objectives and results required at each stage

## Forecasting and Reporting

- Analyse sales campaigns, pipeline efficiency, revenue by lead source, and more
- Segment opportunities by account manager, region, or probability of close

## Lookups and Groups

- Perform temporary lookups or create groups for repeat access to groups of records

## Customer Communications/Mail Merge

- Create custom HTML email templates, then personalise and send using Mail Merge
- Archive letters, emails, faxes, or proposals within customer account records

## Competitor Tracking

- Record competitor product information as well as strengths and weaknesses
- Track sales team members, sales strategies, and reasons for win/loss

## Literature Fulfillment

- Select cover letter, item, priority, send date, quantity, and shipping options

## Reference Library

- Store product information, marketing collateral, manuals, pricing, and presentations
- Attach and send files from the Library in emails to customers and prospects

## Territory Realignment

- Realign sales territories, create new teams, and re-assign account ownership

## Integrated Marketing, Customer Service, and Support

- View marketing campaign details, response rates, and associated sales revenue
- Arm sales reps with a history of their customers' service and support issues

## Back-Office Integration

- View accounting data such as credit status and accounts receivable balance
- Access current product information, inventory, pricing, and discounts

## Windows, Web, and Mobile

- Select the access method(s) that best fit your varied sales team
- Synchronise rapidly and work offline, or work online over a network or the Web
- Utilise wireless phones and PDAs for quick access to customer data in the field

## Business Alerts/Notification

- Monitor data proactively and notify management when business conditions are met
- Receive alerts via email, pager, PDA, fax, mobile phone, or Web browser

# 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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