



SalesLogix

Support Datasheet

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

Sales and Marketing deliver customers to your business, but your Customer Support department keeps them with you for the long haul. With the costs of acquiring new customers 5-10 times higher than retaining existing customers, support solutions designed to help foster lasting relationships with your customers have a tremendous impact on the bottom line.

To deliver beyond your customers' expectations and exceed your support department's performance goals, support professionals must be able to resolve issues quickly and effectively. Sage SalesLogix Support provides the advanced issue tracking and resolution tools needed to do this. It also gives access to relevant customer data – including products purchased, ticket and defect history, and maintenance contract status. All this helps your people maximise the effectiveness of each interaction with your customers.

Sage SalesLogix Support also provides powerful self-service support solutions via the Web, reducing transaction costs and allowing your customers around the world to get the support they need, how and when they need it.

Features at a glance:

Sage SalesLogix Support provides powerful capabilities for tracking, managing, and resolving customer support issues.

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

The screenshot displays the Sage SalesLogix Support application interface. The main window shows a ticket details view for ticket ID 001-00-000032. The interface includes a menu bar (File, Edit, View, Insert, Schedule, Lookup, Write, Tools, Outlook, Window, Help), a toolbar, and a sidebar with navigation options like Sales, Marketing, Service, Support, Contacts, Ticket List, Defects, Activities, Calendar, and Reports. The ticket details section includes fields for Account (Abbott Ltd), Contact (Abbott, John), Serial Number (TEC1000006), and Assigned To (Brink, Samantha). A 'Ticket Activities' table is visible, showing a list of activities with columns for Activity Type, Public Access, User, Start Date, End Date, and Follow-Up. The 'Description' field contains a detailed account of a DVD problem on Toshiba laptops, including a list of possible causes and a resolution provided by Samantha Brink.

| Activity Type | Public Access | User | Start Date | End Date | Follow-Up |
|-----------------|---------------|-----------------|----------------------|----------------------|-----------|
| Received E-Mail | 5-Internal | Brink, Samantha | 7/24/2006 9:00:00 AM | 7/24/2006 9:00:00 AM | No |
| Sent E-Mail | 5-Internal | Brink, Samantha | 7/24/2006 9:00:00 AM | 7/24/2006 9:00:00 AM | Yes |
| Sent E-Mail | 5-Internal | Brink, Samantha | 7/23/2006 8:45:00 AM | 7/23/2006 8:45:00 AM | No |

Sage SalesLogix Support provides easy access to all the information and resources your support people need to quickly resolve issues.

Benefits

- Maximise effectiveness of support centre interactions.
- Reduce per-transaction costs.
- Deliver effective self-service solutions.
- Gather and retain critical intelligence.
- Build and enhance customer relationships.
- Extend access to support resources globally.
- Personalise the support experience.

Streamline Support Centre Activities

Sage SalesLogix Support provides advanced issue-tracking and resolution tools, enabling you to exceed customer expectations and internal performance goals. Manage call and defect tracking, service contract renewals, and returns. Sage SalesLogix also provides escalation alerts via phone, email or pager, based on business rules you define.

Keep Critical Knowledge at Your Fingertips

The powerful SpeedSearch knowledge base in Sage SalesLogix helps support professionals quickly locate resolutions to customer issues. Support reps can efficiently search resources such as prior call tickets, standard problems, and resolutions, or access reference materials such as manuals, FAQs and white papers.

Help Customers Help Themselves

Reduce costs by empowering customers to find the answers they need – online, at their convenience. The Sage SalesLogix Web Customer Portal puts the same intelligence used by your support team on your Web site, along with a powerful search engine that simplifies the self-service experience. With Sage SalesLogix Support, customers and employees around the world can also create and track support tickets online, anytime.

Share Information with Sales and Marketing

A record of every support interaction is stored within each customer's account history in Sage SalesLogix, so employees from Sales and Marketing to Accounting and Finance can share a complete view of all account activity.

Whether you're a software company that meticulously tracks bugs and feature requests, or an appliance manufacturer concerned with efficiently managing returns, your support team will have the resources it needs to quickly resolve issues and build lasting and profitable customer relationships.

*Sage E-Marketing is an optional component.

The screenshot displays the Sage SalesLogix Reports application. The main window is titled 'SalesLogix - [Reports]' and shows a 'Reports' section with a 'Ticket' report selected. The report preview shows a list of ticket IDs (e.g., 001-00-000011 to 001-00-000037) and a 'Ticket Report' summary for ticket 001-00-000011. The summary includes account information (Yard Institute, Paul Banks), contract ID (c0 F8AA000004), and received/assigned/completed dates (5/29/2006). A 'Call Turn-Around Analysis' report is also visible, showing columns for Ticket ID, Received Date/Time, Completed Date/Time, Completed By, and Urgency.

Analyze the effectiveness of support centre activities and report on key metrics such as call response times and defect history.

Features

Account and Contact Management

- Access detailed information about the customers your department supports.
- View ticket assignments, priority weightings, and notification requests.
- Link attachments and comments to records for historical reference.

Ticket Management

- Automatically assign tickets to the appropriate resource based on area of expertise.
- Record the status, urgency and nature of the issues, and track time to resolution.
- Store and review comments, attachments, and an activity history.
- Solve issues then archive resolutions in the knowledge base for future reference.

Service Contract Management

- Track contract details including ID number, type, service level, amount, and end date.
- Manage multiple contract types – per incident, time period, or cost amount.
- “Punch-in” and “Punch-out” to track time spent on individual support issues.

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.

Defect Tracking

- Track defect details including ID number, severity, priority, status, problem type, description, and source.
- View associated tickets, returns, attachments, and asset information.
- Provide communication medium between Support and Product Development.

Returns

- Ensure product returns are processed efficiently and accurately.
- Record defects, shipping instructions, serial numbers, attachments, and comments.

Standard Problems and Resolutions

- Access solutions to frequently recurring issues quickly and efficiently.
- Automatically populate resolutions into tickets after performing a lookup.

Calendar and Activity Management

- Manage schedules and keep track of activities and events for multiple users.
- Track phone calls, meetings, to-do's, events, and literature requests.

Asset Management

- Associate assets with accounts, tickets, defects, contracts, or returns.
- View information on product codes, names, vendors, and pricing.

Sales and Support Integration

- Arm sales reps with a history of their customers' support issues and details.
- View the status, urgency, issue, ticket ID, and dates for open and closed tickets.

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.

Lookups and Groups

- Perform custom queries to locate records and update information.
- Create groups based on results of lookup to track ongoing status.

Notification and Alerts

- Monitor data proactively and receive alerts when service conditions are triggered.
- 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 support reps use.
- Provide customers with convenient self-service solutions via the Web.
- Scan search results efficiently with advanced filtering, scoring, sorting and preview capabilities.

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**

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**

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

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