

Sales, Marketing, Customer Service/Support, and Mobile



Sage SalesLogix Sales Solutions

Overview

Sage SalesLogix empowers you with the tools and resources needed to effectively manage all aspects of the sales cycle and increase your sales team's performance. With Sage SalesLogix, you can more effectively manage opportunities, monitor and forecast sales activity, and automate key sales processes—shortening your sales cycle and helping your sales team to close more deals. Robust customization capabilities enable you to tailor Sage SalesLogix to meet your unique selling environment. And, Sage SalesLogix offers flexible access points to your critical CRM data, including Windows, Web, or mobile devices, without sacrificing functionality or usability.

Get a Complete View of Customer Information

Your sales reps can view all interactions for accounts, contacts, and leads in an easy-to-learn and use interface so they have access to the information they need to be successful in their role. All customer interactions, including notes, opportunities, activities, purchased products, marketing campaign information, tickets, and more can be viewed and shared—so your sales reps can better sell to and service customers.

BENEFITS SNAPSHOT

Maximize team performance with advanced sales tools and resources.

Drive sales opportunities through the sales cycle faster by **automating your proven sales processes**.

Make **informed, profitable business decisions** based on accurate visibility into the sales pipeline.

Get a complete view of customer information, **maximizing your selling effectiveness**.

Access **vital customer information** anytime, anywhere.

The image shows a BlackBerry mobile device on the left, displaying the Sage SalesLogix Mobile app interface with icons for Accounts, Contacts, Activities, Products, and Subscription. In the center is a desktop computer monitor displaying the Sage SalesLogix web application. The web application shows a detailed view of an account for 'Abbott Ltd.' with contact information, a list of opportunities, and a list of tickets. The keyboard is visible at the bottom of the monitor.

Get the information you need to close sales, whether you're connected or disconnected, using Windows, Web, and popular mobile devices.

"Our salespeople know exactly where to direct their attention. They generate a report out of Sage SalesLogix, which clearly identifies prime targets and enables them to be proactive and more efficient in servicing accounts. Our account growth is directly related to use of the solution."

—Colin Ross
Sales Manager, LEGOLAND® California

Manage Sales Opportunities for Maximum Effectiveness

Access vital opportunity data to forecast revenue, make adjustments in territories, and drive more deals to a close. Sage SalesLogix Opportunity Management enables you to view and interact with key opportunity data through dashboards, robust reports, and Sage SalesLogix Visual Analyzer, an advanced business analytics tool that integrates with Sage SalesLogix. You can track the stages of a sales cycle, gauge the likelihood of closing sales, forecast revenue, understand win/loss data, and more so you can take corrective action or make more strategic decisions, such as territory realignment.

Boost Your Sales Team's Productivity

Automate sales processes to maximize team productivity and shorten the sales cycle. Sage SalesLogix enables you to customize and automate sales processes—driving sales to a close faster. Implement proven standardized sales methodologies, such as Solution Selling or Miller Heiman®, or create custom sales processes based on criteria you define. Sales team members are prompted to complete tasks such as making phone calls, scheduling meetings, and more—increasing their productivity and ensuring all steps are followed in a proven sales technique. You can also automate lead distribution to individuals or teams so hot leads can be acted on fast!

Provide Your Mobile Workforce with Access

Sage SalesLogix uniquely enables you to deploy access methods that are best for your sales organization. With Windows, Web, and mobile client deployment options on popular devices such as BlackBerry® and Windows Mobile® (Pocket PC and Smartphone), your sales force has access to complete Sage SalesLogix information, whether connected or disconnected, without sacrificing functionality, usability, or robust customizations.

Opportunity - Abbott Ltd.-Phase I

Add Sales Order

Status: Sales Order
Customer P/O: Abbott, John
Sales Order: Abbott Ltd.
Order Date: 6/23/2008
Type: Regular Order
Shipping Name: Abbott, John
Account: Abbott Ltd.
Address: 4286 W. Grand Avenue
Suite 900
Chicago, IL 60651
USA
Ship Via:

Product

Product	Family	Program	Disc.	Qty.	Extended Price
MS Office2003 Professional	Software	Retail	15.00 %	500	\$289,500.00
MS Windows XP Professional	Software	Retail	15.00 %	400	\$114,840.00
Laptop Personal Warranty	Warranty	Retail	15.00 %	500	\$134,550.00
Refurb Laptop TabletPC	Hardware	Retail	15.00 %	500	\$1,174,500.00

Leads

Name	Company	City	State	Work Phone	E-mail	Owner
Anderson, Chuck	Advanced Robotics & E.	Northbrook	IL	847-920-7111	chuckanderson@att.net	Milward
Buck, John	Ad Group Inc	Carol Stream	IL	630-989-0003	john@adgroupinc.com	Milward
Burke, Mary	Kwik-Kwik Manufacturing	South Bend	IL	815-359-2388	mburke@kwik-kwik.com	Milward
Brownstein, Brian	World Automatics Inc.	Elmhurst	IL	630-833-0400	bbrownstein@worldauto.com	Milward
Brownstein, Richard	Pacific Sealing Corp	Rockford	IL	815-394-4000	rbrownstein@pacseal.com	Milward
Calk, Nigel	General Warehouse Co.	Channahon	IL	815-407-7658	nigel@generalwarehouse.com	Milward
Clifford, Scott	Pacific Sealing Corp	Rockford	IL	815-394-4076	scott@pacseal.com	Milward
Compton, Peter	Bacon Gear & Engineering	Crystal Lake	IL	815-459-4920	pcompton@bacongear.com	Milward
Crawford, Paul	Ad Group Inc	Rockford	IL	815-377-7171	pcrawford@adgroupinc.com	Milward
Day, Bill	QF Hardware Inc.	Streator Park	IL	847-678-9534	bill@qfhardware.com	Milward
Dewhurst, Dennis	E-W Machine Company	Villa Park	IL	630-827-7331	dennis@e-wmachine.com	Milward
Dowling, Melissa	Automation Inc (SME)	Chicago	IL	312-888-9440	melissa@automationinc.com	Milward
Dunham, Chris	Reveron Inc.	Rockford	IL	815-399-4000	cdunham@reveron.com	Milward
Edwards, Mark	Advanced Robotics & E.	Streator Park	IL	847-678-9534	mark@advancedrobotics.com	Milward
Eggenschall, Kim	W.A. Whitely Co.	Rockford	IL	815-398-5800	kim@eggenschall.com	Milward
Eller, David	Elm Corporation	Neenah	IL	847-722-0508	deller@elmcorp.com	Milward
Fachner, Neil	Abbott-Watson Co.	Elk Grove Village	IL	847-477-5800	neil@abbott-watson.com	Milward
Ford, Steve	Regional Selling Tool Co.	Neenah	IL	815-225-8911	steve@regional-selling.com	Milward
Halladay, Gary	Hawthorn Sustainable Sys.	Carpentersville	IL	888-523-4281	gary@hawthorn.com	Milward
Kalish, Dan	Cosmic Inc	Moline	IL	309-762-0096	dan@cosmicinc.com	Milward
Leach, Eugene	Pacific Sealing Corp	Aurora	IL	630-833-0235	eugene@pacseal.com	Milward
Leach, Steve	Advanced Robotics & E.	Neenah	IL	815-225-8911	steve@advancedrobotics.com	Milward
Morris, Laurie	Ad Group Inc	Rockford	IL	(815) 394-4000	laurie@adgroupinc.com	Milward
Myers, Ed	Servpro Inc	Crystal Lake	IL	815-455-2222	edmyers@servpro.com	Milward
Palmer, David	Price Cables Inc.	Carpentersville	IL	888-523-4281	david@pricecables.com	Milward
Reynolds, Tom	Abbott-Watson Co.	Elmhurst	IL	847-477-5800	tom@abbott-watson.com	Milward
Reynolds, Tom	Aurora Sealing Company	Neenah	IL	815-398-5800	tom@aurorsealing.com	Milward
Quarles, Lee	Abbott-Watson Co.	Rockford	IL	815-394-4076	lee@abbott-watson.com	Milward
Ross, Jason	Hawthorn Sustainable Sys.	Rockford	IL	(888) 523-4281	jason@hawthorn.com	Milward
Ross, Ron	Abbott-Watson Co.	Chicago	IL	773-888-0400	ron@abbott-watson.com	Milward

Filters

select all / clear all

[+] Name
[+] Company
[+] City
[+] State
[+] Work Phone
[+] Owner

Common Tasks

undo filters

Quickly create a sales order within a customer's record.

Use filters to organize your Leads into groups and easily send customized communications using Mail Merge.

FEATURES

Sales Process Automation

- Customize processes based on product line, deal size, territory, or lead type.
- Define stages and steps and assign objectives, activities, results, and close probability.

Opportunity Management

- Manage all key opportunity data for maximum sales productivity and effectiveness.
- Track probability of close, products, lead source, status, and competitors.
- Generate sales proposals that automatically reflect native customer currency.

Account and Contact Management

- View an Account Timeline of all Activities, Notes, Opportunities, and Tickets for a deeper understanding of trends over time.
- Access and record detailed information about customer accounts and contacts.
- Assign ownership, establish account hierarchies, and track lead sources and status.
- Share information captured at all points of interaction for a complete customer view.

Calendar and Activity Management

- Manage schedules and track phone calls, meetings, to-dos, events, and literature requests.
- Associate an attachment to meetings, phone calls, to-do items, e-mails, notes, and personal activities.

Application Integration

- Manage contacts, e-mail, and calendars using Microsoft® Exchange, Microsoft Outlook®, or the built-in Sage SalesLogix e-mail solution.
- Integrate with leading back-office applications to access key customer information such as credit status, payment history, shipping information, inventory, pricing, discounts, and more.

Business Analytics Tools

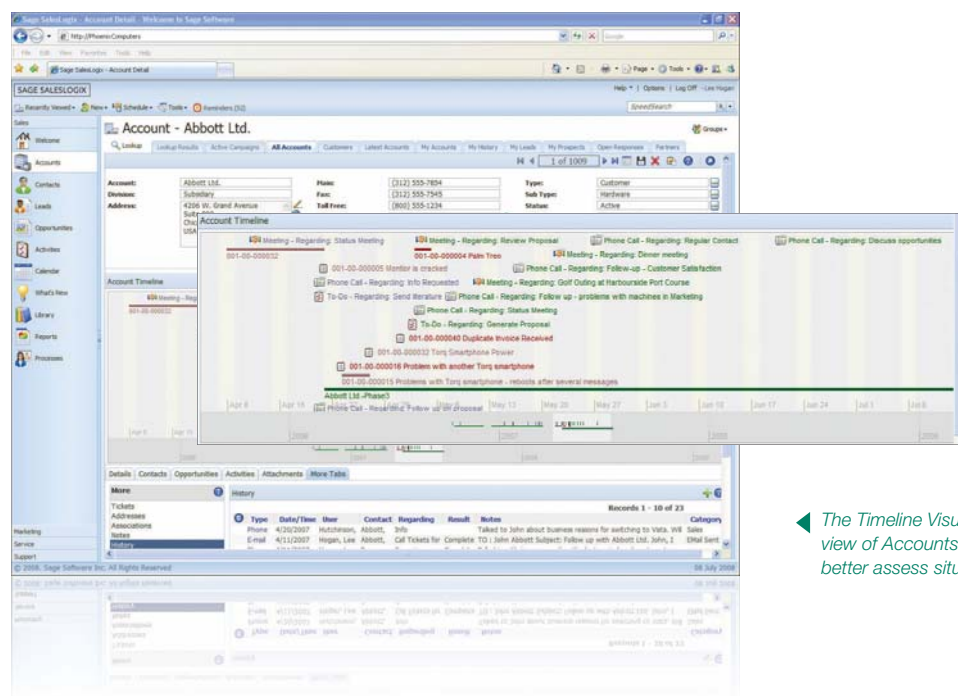
- View interactive dashboards to understand deals in the sales pipeline, sales potential, performance metrics, and more.
- Integrate Sage SalesLogix Visual Analyzer, an advanced business analytics tool, for an even deeper understanding of team and territory performance, including revenue potential, estimated and actual close dates, status, probability of close, and more.
- View pre-built and customizable reports to help analyze pipeline efficiency, revenue by lead source, and more.

Sales Forecasting

- View opportunity totals and key metrics for quick analysis of the sales pipeline.
- 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.
- Use filters to quickly and easily identify relevant subsets of data and save as an ad-hoc group.
- Export groups to Excel® with one click for additional analysis.



◀ The Timeline Visualization feature provides a holistic view of Accounts over a period of time so you can better assess situations and adjust accordingly.

"And, overall, Sage SalesLogix has provided significant improvement in sales rep productivity with a 20 percent across-the-board time savings, as well as 23 hours a week time savings on reporting and forecasting from a business unit!"

—Greg Stoner
Director of CRM Architecture, Avnet

Find out more

- Contact your certified Sage SalesLogix Business Partner, or
- Call 800-643-6400 to speak to a Sage SalesLogix representative, or
- Visit www.sagecrmsolutions.com/demo/sagesaleslogix

Customer Communications/Mail Merge

- Create custom HTML e-mail templates, then personalize and send using Mail Merge.
- Archive letters, e-mails, faxes, or proposals within customer account records.

Competitor Tracking

- Record competitor product information as well as strengths and weaknesses.
- Utilize on-the-spot notes and strategy to perform in competitive situations.

Literature Fulfillment

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

Reference Library

- Maintain a central repository for company information, resources, marketing collateral, pricing, and more.
- Attach and send files from the Library in e-mails to customer and prospects.

Territory Realignment

- Realign sales territories based on multiple business conditions you define.

Windows, Web, and Mobile

- Select the deployment method(s) that best fits your varied sales team.
- Synchronize rapidly and work while disconnected (using Windows, Web, or Mobile clients), or work while connected over a network or the Web.
- Utilize BlackBerry® or Windows Mobile® (Pocket PC or Smartphone) for quick access to customer data in the field.

About Sage SalesLogix

Your highest priority is to grow your business, and your business tools should help you achieve that goal. Sage SalesLogix provides a complete view of customer interactions across sales, marketing, customer service, and support so your teams can collaborate and respond promptly and knowledgeably to customer inquiries and opportunities. Capitalize on key opportunities by targeting your most profitable prospects and customers using marketing campaign and lead management tools. Manage the entire sales cycle and increase sales team performance by automating sales processes and monitoring and forecasting sales activity. Resolve customer requests and issues quickly with customer service and support management tools. Sage SalesLogix powerful business analytics tools will enable you to utilize resources better, identify and act upon opportunities, and make better strategic decisions. With flexible access options, powerful process automation capabilities, and a highly customizable platform, Sage SalesLogix is a comprehensive solution that will help you achieve stronger sales and a more successful business, now and into the future.



End-to-end solutions. Expert advice.
Ongoing support. That's Sage 360°.

Sage Software supports the needs, challenges, and dreams of 2.7 million small and mid-sized business customers in North America through easy-to-use, scalable and customizable software and services. Sage Software is a subsidiary of The Sage Group plc, a leading international supplier of business management software and services formed in 1981 and listed on the London Stock Exchange since 1989.

8800 N. Gainey Center Drive,
Suite 200
Scottsdale, AZ 85258
Phone: 800-854-3415
www.sagesoftware.com

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software
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