



## 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.



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

## 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

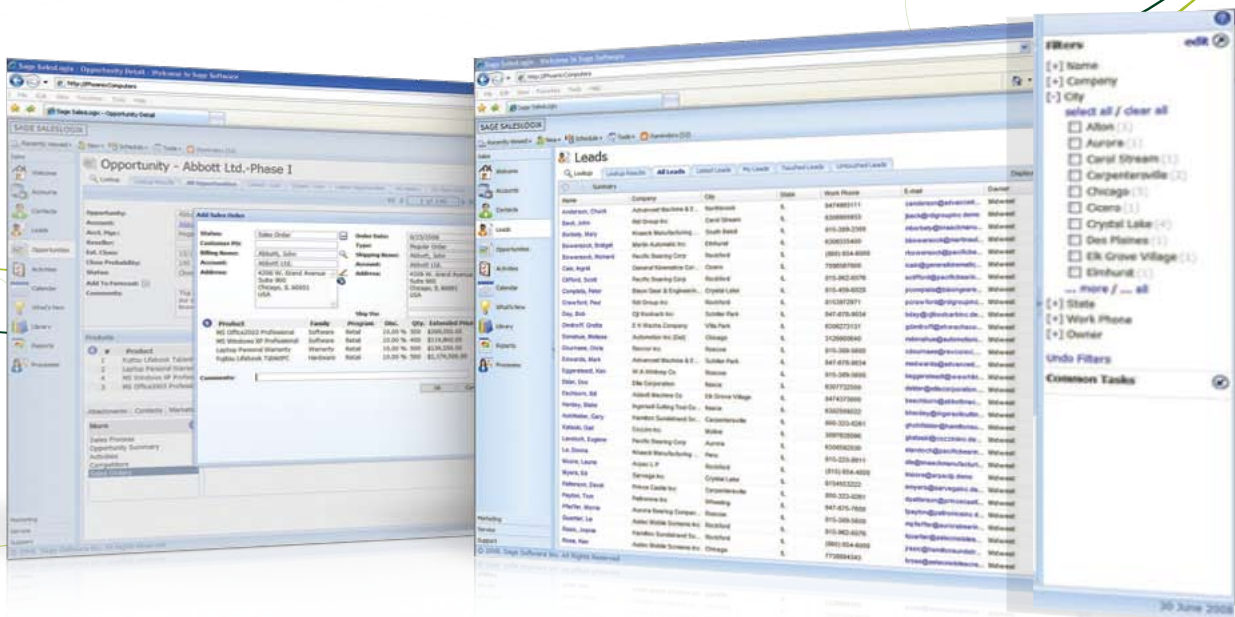
Automate sales processes to maximize team productivity and shorten the sales cycle. Sage SalesLogix enables you to customize and automate sales processes—driving sales to a close faster. Implement proven standardized sales methodologies, such as Solution Selling or Miller Heiman®, or create custom sales 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.

The company's focus has always been on satisfying the customer, but we didn't have a system to support it. We wanted something more than sales force automation or contact management. We wanted a system to drive our operations and we found that in Sage SalesLogix."

— Tom Mitchell,  
Director of Technology  
Services, Bordner Installation  
Group Inc.



◆ 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.

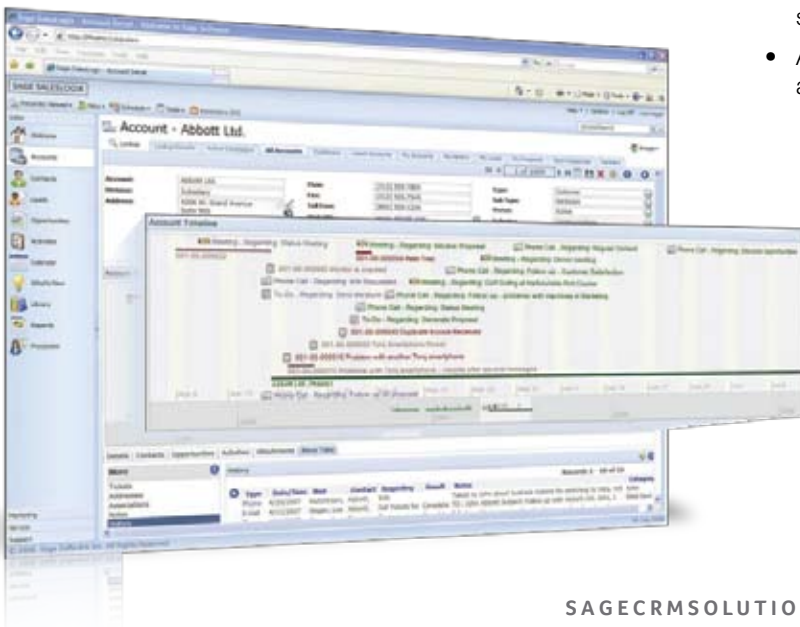
### Lookups and Groups

- 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.

### 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.

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



## 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.

**“We definitely attribute our increased sales volume to Sage SalesLogix. Our ability to organize, prioritize, and follow through means we’re closing more sales than before.”**

— Mike McGuire  
Managing Partner and Vice  
President of Sales Zink  
Foodservice Group

### 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. 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.

### About Sage CRM Solutions

Sage CRM Solutions is a portfolio of market-leading applications consisting of ACT! by Sage, Sage CRM, and Sage SalesLogix. Over 56,000 organizations and 3.1 million users worldwide rely on Sage CRM Solutions to develop profitable, long-term business relationships.



## Datel

Cinnamon Park  
Warrington  
WA2 0XP  
UK

**t** 0845 521 1875

**f** 01925 849 111

**www.datel.info**



## About Datel

Datel is Sage's largest Business Partner in the UK and is acclaimed as its leading systems integration specialist. Headquartered in Warrington, Datel also has offices in Leeds and the Netherlands employing a loyal team of over 140 highly-skilled people who look after its growing base of over 900 customers worldwide.

We specialise in:

- Sage ERP X3
- Sage 200
- Sage Line 500
- Sage ERP 1000
- Sage CRM
- SalesLogix

We also have our own in-house products which we have developed to integrate with, and sit alongside, Sage solutions. Known as Datel FUSION, the suite of products enhances and extends the functionality provided by the core Sage applications.

Datel looks after a broad ranging base of customers including those in the following sectors:

- Distribution
- Manufacturing
- Food and drink
- Chemical Processing

Typically they are mid sized companies who rely upon Datel to make the most of their investment with Sage.

We pride ourselves in our approach to doing business. We seek to know and thoroughly understand our customers and their businesses so, in turn, we can appreciate fully all of the issues and challenges they face. Only then can we presume to offer a solution that will make a real difference to the way they do business. Everything Datel does is guided by our belief in providing only the very best in customer service.

To find out more about our products and services, visit our website at [www.datel.info](http://www.datel.info)