



## Sage SalesLogix | Sales Solutions

Your relationships. Your information. Your CRM.

### 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.

### Easy to Use and Adopt

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.

Team members can leverage powerful filters and groups to quickly get the information they need and to interact with CRM data more efficiently. Hyperlinks and one-click access to common features help sales reps get their tasks done more quickly. Drag and drop and right mouse button clicking ensure they're working the way they like to work. And, reps can customize their workspace to match their unique style and personal preferences.

To further ensure adoption, Sage SalesLogix integrates with common desktop applications like Microsoft Office and Outlook so sales reps can continue to use applications their familiar with.

### 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.

**Try It Today!**

[trial.sagesaleslogix.com](http://trial.sagesaleslogix.com)

For More Information  
Call 651-688-2473

## 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

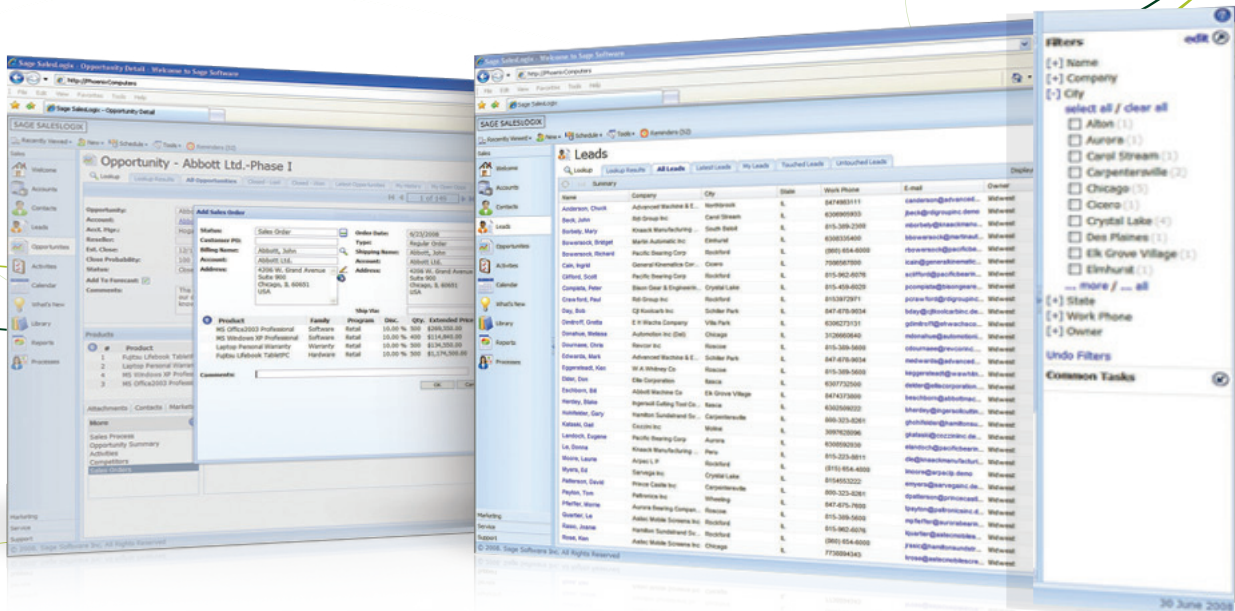
Automate sales processes to maximize team productivity and shorten the sales cycle. Sage SalesLogix enables you to customize and automate sales processes—driving sales to a close faster. Implement proven standardized sales methodologies, such as Solution Selling or Miller Heiman®, or create custom sales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

“Sage SalesLogix has had a profound impact on our sales force...It's been very easy, friendly and logical for our salespeople. We haven't had to force the system on them. It makes sense to them and matches their workflow.”

— David Peckinpaugh,  
Vice President of Sales  
Expert



● 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

- Integrate with business and productivity applications, like Microsoft Office and Outlook, and Web Services.
- 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.

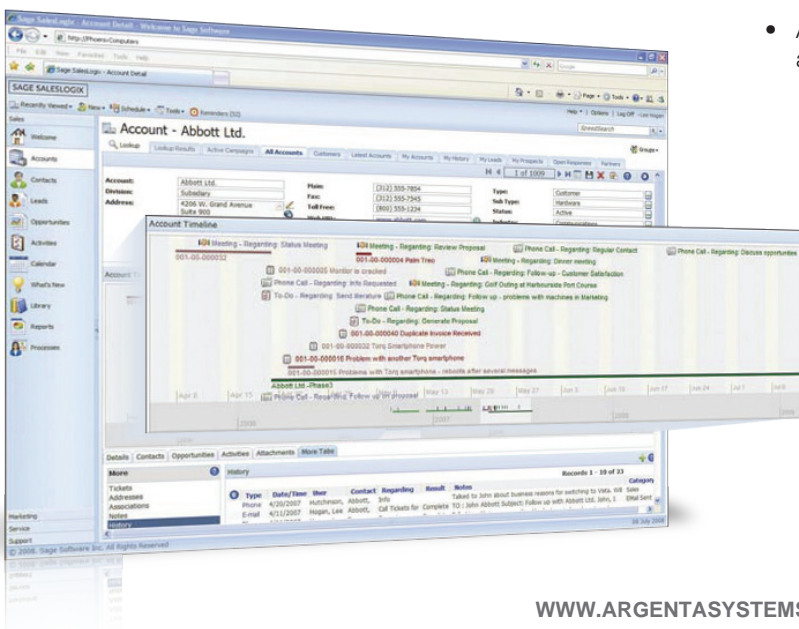
### Lookups and Groups

- 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.

## Flexible Deployment Options

- On-premise or in the Cloud.
- Windows, Web, and mobile access.
- 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.

**“The use of Sage SalesLogix has been a key driver for managing pipelines and organizing our efforts from the individual to the sales organization as a whole. It has helped increase my ability to manage reps, forecast performance, and to create and execute strategies.”**

— Ed Burke  
Sales Manager  
ScentAir Technologies

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### About Sage SalesLogix

Sage SalesLogix provides a complete view of customer interactions across departments—providing information and insights for better planning, managing, and forecasting. Your teams will have the tools to increase sales, reach more profitable customers, enhance the customer experience, and anticipate customer needs. Sage SalesLogix offers flexible access, deployment, and payment options to address business requirements.

### About Sage Group, plc

Sage is a leading supplier of business management software and services to 5.8 million customers worldwide. From small start-ups to larger organizations, we make it easier for companies to manage their business processes.