



**SAGE MAS 90 SAGE MAS 200  
SAGE MAS 500**

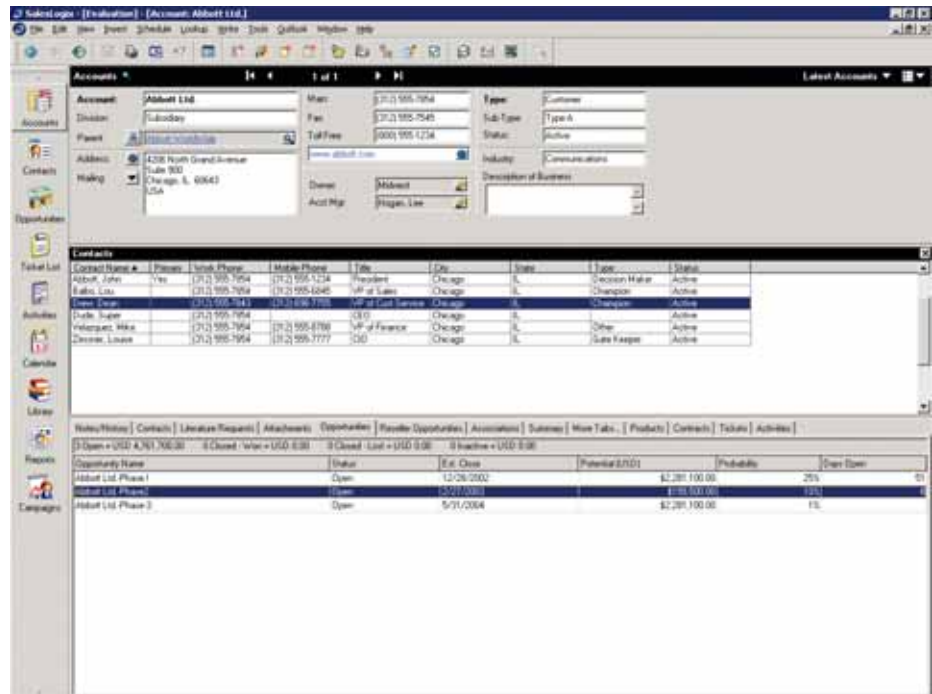
**SAGE CRM SALESLOGIX SALES**

Sage CRM SalesLogix Sales is the core module of the integrated Sage CRM SalesLogix customer relationship management (CRM) suite, which also includes Marketing, Customer Service, and Support solutions.

**FEATURES**

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

- Account and Contact Management
- Opportunity Management
- 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 Wireless



*Sage CRM SalesLogix is organized and easy to use, putting the information and resources you need to close sales and manage relationships at your fingertips.*

**A Single Source for Customer Information**

Sage CRM SalesLogix 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 organization 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.

**Increase Sales Productivity and Performance**

Sage CRM SalesLogix 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 personalized communications to individual customers or groups of prospects using customized HTML e-mail templates. They can also track competitors and access the Sales Library for product specifications, FAQs, or marketing materials.

Advanced Outlook Integration enables users to share contacts, send e-mails, and manage calendars using Microsoft Outlook from within Sage CRM SalesLogix, and record the activity to account history.



## 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

### Opportunity Management

- Track probability of close, products, lead source, status, and competitors
- Generate sales proposals automatically reflecting native customer currency

### Calendar and Activity Management

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

### Advanced Outlook Integration

- Manage contacts, e-mail, and calendars using Microsoft Outlook within Sage CRM SalesLogix
- Send e-mail and attachments using Outlook and record to Sage CRM 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

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

### Lookups and Groups

- Deliver targeted marketing messages or sales offers to select customer segments

### 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
- 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 e-mails 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 Wireless

- Synchronize rapidly and work offline, or work online over a network or the Web
- Utilize 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 through e-mail, pager, PDA, fax, cell phone, or Web browser

### Administration and Customization

- Manage team and territory assignments, user profiles, and admin roles
- Configure views, reports, menus, fields, processes, and security profiles



*"Sage CRM SalesLogix helps our sales reps work more efficiently, and allows me to report on our sales pipeline quickly and accurately."*

Larry Harmeyer  
CRM/Information Systems  
Project Manager  
Trinity Industries



# Sage MAS 90, Sage MAS 200, and Sage MAS 500

Sage CRM SalesLogix Sales

## About Sage Software

Sage Software (formerly Best Software) offers leading business management software and services that support the needs, challenges, and dreams of more than 2.4 million small and mid-sized business customers in North America. Its parent company, The Sage Group plc (London: SGE.L), supports 4.5 million customers worldwide. For more than 25 years, Sage Software has delivered easy-to-use, scalable, and customizable software for accounting, customer relationship management, human resources, time tracking, and the specialized needs of accounting practices and the construction, distribution, manufacturing, nonprofit, and real estate industries. For more information, please visit the Web site at [www.sagesoftware.com/moreinfo](http://www.sagesoftware.com/moreinfo) or call 866-308-2378.

## About Sage CRM SalesLogix

Sage CRM SalesLogix is the customer relationship management solution that enables small to mid-sized businesses to cultivate profitable customer relationships by increasing sales and marketing performance and maximizing customer satisfaction and loyalty.

Designed to meet the distinct needs of small to mid-sized businesses, Sage CRM SalesLogix delivers integrated Sales, Marketing, Customer Service, and Support automation solutions that adapt to your unique customer acquisition, retention, and development processes.

Sage CRM SalesLogix provides a complete CRM solution with low cost of ownership, rapid time to productivity, and high return on investment. Flexible and easy to use, Sage CRM SalesLogix readily accommodates growth and changing business requirements.

Sage CRM SalesLogix, the SMB CRM leader with more than 6000 customers worldwide, is part of the Sage Software family of integrated business management solutions.



The Premier Sage Software Business Partner

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### Sage Software Business Partner of the Year

#### Complete Sage Software Solutions

Sage MAS 500 ◊ Sage MAS 200 ◊ Sage MAS 90  
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Sage ABRA HRMS ◊ Sage FAS ◊ Sage MIP Fund Accounting & Fundraising

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