



## Sales

### A Single Source for Customer Information

Sage SalesLogix Sales 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.

### The Information You Need, How You Need It

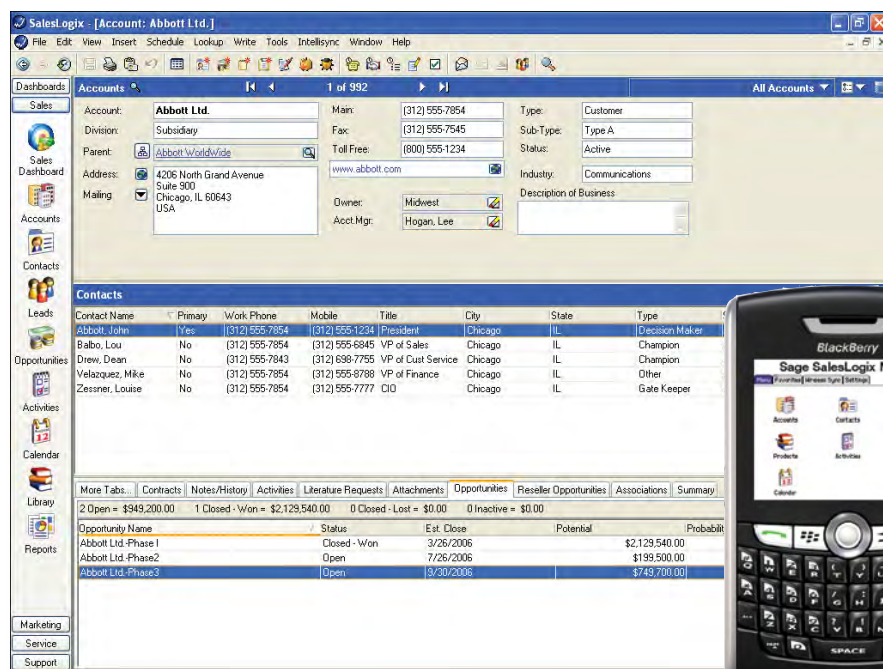
SalesLogix Sales provides you with the Freedom of Choice to select the deployment method best suited for your sales teams, without sacrificing functionality, usability, or robust customization capabilities. Users can work online over a network or the Web, synchronize rapidly and work offline, or use a mobile device for quick access to customer information in the field. Users can be more productive, as they always have access to the same key customer information.

### Increase Sales Productivity and Performance

SalesLogix Sales 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.

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



SALES

MARKETING

CUSTOMER SERVICE

SUPPORT

MOBILE

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

## FEATURES

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

- Account and Contact Management
- Opportunity Management
- Real-time, Interactive Dashboards
- 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 Mobile

◀ Sage SalesLogix is organized and easy to use, putting the information and resources you need to close sales at your fingertips, including mobile access through both BlackBerry and Windows Mobile devices.

## BENEFITS

Increase productivity by automating key aspects of the sales cycle.

Maximize team selling effectiveness with advanced sales tools and resources.

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

Customize to mirror unique business processes and to accommodate growth and change.

Integrate Sales with Marketing, Customer Service, Support, and Accounting for holistic customer account management.

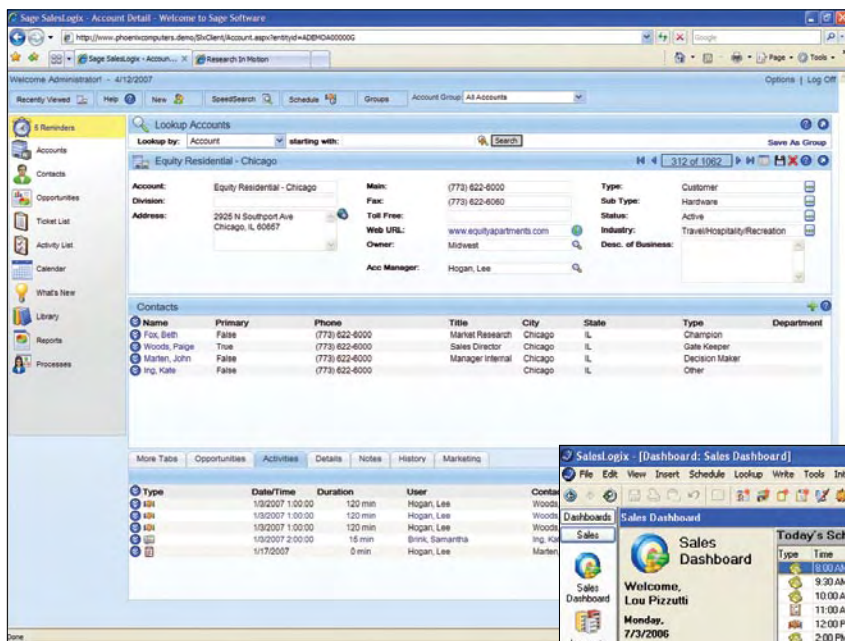
## Insight for Informed Business Decisions

Sage SalesLogix Sales provides the insight for informed business decisions and the management tools to implement them. Access a real-time dashboard view of the sales pipeline in order to accurately analyze the revenue potential and probability of close in your sales pipeline. Segment your sales opportunities by account manager, region, or status. Use integrated Crystal Reports® to gauge individual or team effectiveness and guide territory realignment or redistribution of your marketing spend. Receive automatic alerts on pending sales opportunities based on business conditions you define.

## Truly Integrated CRM

Sage SalesLogix provides your sales team with a true 360-degree customer view, consolidating information from Sales, Marketing, Customer Service, and Support, so they can close more deals and increase customer satisfaction and retention.

Integration between Sage SalesLogix and your back-office accounting application provides your sales professionals access to the most current product information, pricing, discounts, and inventory when creating quotes or taking orders. In addition, without having to leave Sage SalesLogix, they can view all relevant customer data, such as credit status, terms, and account balance so they can better service customers.



▶ The Sage SalesLogix Web Client provides users with anytime, anywhere access to Sage SalesLogix and your critical customer data through a Web browser.



View performance metrics, diagnose key issues, and identify opportunities from a single location with Sage SalesLogix Dashboards.

## 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.
- Share information captured at all points of interaction for a complete customer view.

### Opportunity Management

- Track probability of close, products, lead source, status, and competitors.
- Generate sales proposals automatically reflecting native customer currency.
- View Opportunity Snapshot and e-mail key summary data to managers with one click.

### Real-time Interactive Dashboards

- View performance metrics, diagnose key issues, and identify opportunities from a single location.
- Analyze key performance metrics such as pipeline status, open opportunities, and win rates.

### 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

- Perform temporary lookups or create groups for repeat access to groups of records.

### 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.

*"Sage 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



### Territory Realignment

- Realign sales territories, create new teams, and reassign 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 Mobile

- Select the access method(s) that best fit your varied sales team.
- Synchronize rapidly and work offline, or work online over a network or the Web.
- Utilize mobile phones and PDAs for quick access to customer data in the field.

### Business Alerts/Notifications

- Monitor data proactively and notify management when business conditions are met.
- Receive alerts via e-mail, pager, PDA, fax, cell phone, or Web browser.

## About Sage SalesLogix

Award-winning Sage SalesLogix is the CRM solution that enables businesses to acquire, retain, and develop profitable customer relationships by increasing sales and marketing performance and maximizing customer satisfaction and loyalty. Sage SalesLogix delivers deep, rich customization capabilities, high levels of end-user adoption, and low total cost of ownership across all deployment methods including Web, Windows, and mobile devices.

Sage SalesLogix provides organizations with the Freedom of Choice to select the access methods best suited for their teams, without sacrificing functionality, usability, or robust customization capabilities. Users can be more productive as they always experience the same rich user experience, regardless of application preference.

With more than 300,000 users at over 8,500 companies worldwide, Sage SalesLogix is the leading CRM solution for small to midsized businesses and divisions of larger enterprises, and is part of the Sage Software family of integrated business management solutions.



For more information, go to:

[www.sagecrmsolutions.com/saleslogix](http://www.sagecrmsolutions.com/saleslogix)

Or contact your certified Sage SalesLogix Business Partner. To find a Business Partner in your area, call **800-643-6400**.

To register for an online demonstration to see how Sage SalesLogix can help your business, go to:

[www.sagecrmsolutions.com/demo/sagesaleslogix](http://www.sagecrmsolutions.com/demo/sagesaleslogix)

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Corporate Offices

<b>Orange County, California</b> 23161 Mill Creek Drive Laguna Hills, California 92653 Phone: (949) 583.9500 Toll Free: (800) 425.9843 Fax: (949) 583.0649	<b>Atlanta, Georgia</b> 1100 Johnson Ferry Road, Ste. 450 Atlanta, Georgia 30342 Phone: (404) 841.6240 Toll Free: (800) 455.1368 Fax: (404) 841.6243
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[www.blytheco.com](http://www.blytheco.com)      [solutions@blytheco.com](mailto:solutions@blytheco.com)

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