

# SALESLOGIX

- SALES
- MARKETING
- CUSTOMER SERVICE
- SUPPORT

SalesLogix is the leader in customer relationship management for small to medium-sized businesses that require flexible, easy-to-use solutions that help acquire, retain and develop profitable customer relationships.

SalesLogix v6.2 provides significant new functionality across the product suite as well as greater ease-of-use and flexibility, with solutions designed to increase sales and marketing performance and maximize customer satisfaction and loyalty.

## UPGRADE TODAY!

For more information about SalesLogix v6.2:

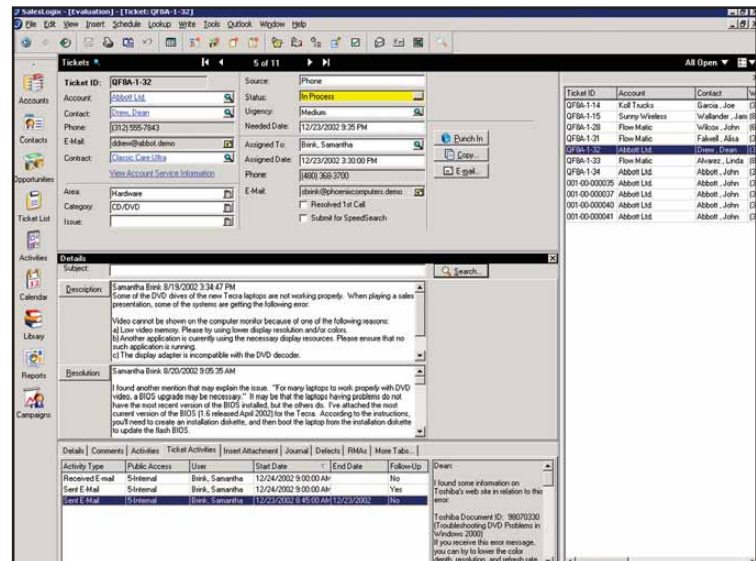
- Contact your certified SalesLogix Business Partner, or
- Call 800-361-2830 to speak to a SalesLogix representative, or
- Visit [www.saleslogix.com/whatsnew62](http://www.saleslogix.com/whatsnew62)

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## WHAT'S NEW IN SALESLOGIX v6.2



*SalesLogix Customer Service enables you to quickly resolve customer questions, issues and requests for a high quality customer experience. Key features include Ticket Management, Advanced SpeedSearch, Service Contract Management, and a Customer Self-Service Web Portal.*

## Features

### EASIER IMPLEMENTATION

- Benefit from express installation for faster “one server” implementations
- Setup Assistant appears after installation within the Administrator
- Import and configure licenses, offices and new users quickly and easily
- Copy and paste licenses as a group from an e-mail or text file
- Import new users directly from Windows (Active Directory not required)

### SALESLOGIX CUSTOMER SERVICE (Windows & Web)

#### Ticket Management

- Resolve customer questions, issues and requests quickly for a high quality customer experience
- Automatically assign tickets to the appropriate resource
- Track ticket ID, contact info, type, status, urgency, assignment and date needed
- Create new service tickets from Account, Contact and other locations
- Schedule phone calls, meetings or to-dos to follow up on open issues
- Send e-mail with attachments and record correspondences and activity history
- Submit issue descriptions and resolutions for archival in the knowledge base
- Create ticket groups, lookups and reports
- Track ownership and individual time spent on customer issues
- Receive automatic notifications when service conditions or deadlines are triggered
- Configure user workflow options, or grant ability to modify at user level



## Features (continued)

### SpeedSearch (Windows & Web)

- Utilize enhanced SpeedSearch to quickly locate resolutions to customer issues
- Perform an advanced keyword search of any SalesLogix table or network directory
- Reference prior tickets, attachments, standard problems and resolutions, procedures, library documents, activities and notes/history
- Search reference materials such as online manuals, FAQs or white papers
- Scan search results efficiently with advanced filtering, scoring, sorting and preview capabilities
- Populate resolutions automatically into service tickets with one click
- Archive approved resolutions in the knowledge base for future reference

### Service Contract Management

- Track contract details including service level, price and time or incidents remaining
- Validate authorizations for specific services and log issues against a contract
- “Punch-in” and “Punch-out” to track time spent on individual issues automatically

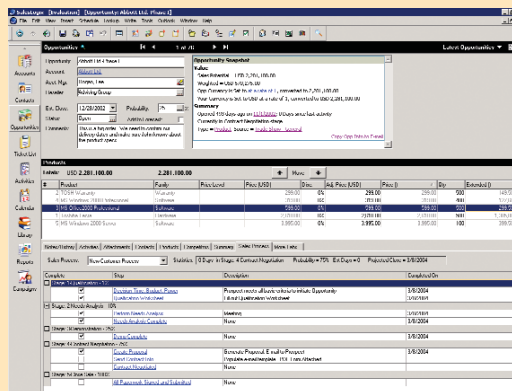
## ENHANCED OPPORTUNITY MANAGEMENT

### Updated User Interface (Windows & Web)

- Create new opportunities, add products, update status and close sales with ease
- View “Opportunity Snapshot” for quick summary of opportunity details
- E-mail key opportunity data to managers with one click
- Update multiple opportunities concurrently with a single click
- Generate sales proposals automatically that include product and pricing table

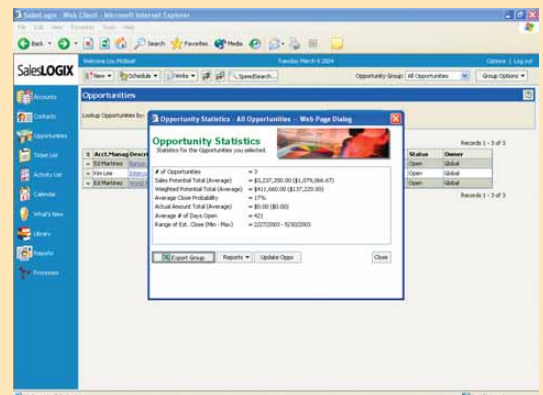
## PRODUCT BENEFITS

- Easier Implementation
- SalesLogix Customer Service
- Enhanced Opportunity Management
- Increased Ease of Use
- Customization Options
- And Much More!



Create new opportunities, add products, update status and e-mail key data with ease. The flexible new sales process engine helps drive opportunities to close.

View opportunity totals and key metrics for a quick analysis of your sales pipeline. Export information to Excel or launch new reports instantly.



## Enhanced Opportunity Entry

- Add all new opportunity data in a single view with configurable default values
- Input description, estimated close, status, source, close probability and products
- Associate multiple contacts and competitors and select sales process
- Add multiple products or product packages quickly and input discount and quantity
- Set opportunity defaults at Admin or user level for efficiency and accuracy

## Opportunity Statistics

- View opportunity totals and key metrics for quick analysis of sales pipeline
- See number of opportunities, total and weighted sales potential
- Review average close probability and average number of days open
- Export information to Excel or launch new opportunity reports instantly

## Sales Process Engine

- Utilize a new, flexible sales process engine to drive opportunities to close
- Define stages and steps and associate corresponding close percentages
- Launch activities such as literature requests, e-mails, proposals or custom forms with one click
- Click checkboxes to register completion of the activity and advance the sale

## Multi-currency Support

- Designate a system-wide base currency and manage multiple alternate currencies
- Lock currency rates if opportunities require
- Generate proposals reflecting native customer currency

## INCREASED EASE OF USE

- Benefit from enhanced workflow, usability and access to information
- Launch a “split view” for visibility of group lists and individual records concurrently
- Insert new Accounts with multiple Contacts from a single view and perform check for duplicate records
- Perform “1-to-many” mail merges for inclusion of tables or lists in documents
- Share access to groups between users simply and release changes
- Copy key contact info to notepad automatically for use in an e-mail or document

## Global date/time support for Activities & Calendaring

- Automatically convert all dates and times to users’ local times
- Access a time-zone calculator when scheduling meetings with other regions

## Windows Authentication – Single Sign-on

- Log-in to SalesLogix automatically using Windows ID and password (optional)
- Retain user administration in the SalesLogix Administrator

## CUSTOMIZATION OPTIONS

- Extend SalesLogix functionality beyond Accounts/Contacts/Opportunities/Tickets
- Create MainViews with the features of standard views including tabs and groups
- Display non-modal forms or dialog boxes in a main view “container”
- Configure sales process stages, steps and actions and bundle for release
- Utilize simplified set-up and maintenance of Area/Category/Issue picklists
- Global scripts are loaded in memory and do not terminate until the application is closed
- Customize all new functionality in Architect (excluding SpeedSearch)



*“The new SalesLogix Customer Service functionality in version 6.2 enables our employees to quickly resolve customer issues and requests, resulting in increased productivity and a high level of customer satisfaction.”*

*Ben Holcombe  
Concurrent Computer Corporation*



## SalesLogix v6.2

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## About SalesLogix

SalesLogix is the customer relationship management solution that enables small to medium-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 medium-sized businesses, SalesLogix delivers integrated Sales, Marketing, Customer Service and Support automation solutions that adapt to your unique customer acquisition, retention, and development processes.

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, SalesLogix readily accommodates growth and changing business requirements.

SalesLogix, the SMB CRM leader with more than 6,000 customers worldwide, is part of the Best Software family of integrated business management solutions.

## About Best Software

Best Software offers leading business management products and services that give nearly 1.8 million small and mid-sized customers in North America the insight for success throughout the life of their business. Its parent company, The Sage Group plc (London: SGE.L), supports over 3.6 million customers worldwide and has revenue of approximately \$899.7 million. For more than 25 years, Best Software has delivered easy-to-use, scalable and customizable applications through its portfolio of leading brands, including Abra, ACT!, CPASoftware, FAS, MAS 90, MIP, Peachtree, SalesLogix and Timberline, among many others. For more information, please visit the Web site at [www.bestsoftware.com/moreinfo](http://www.bestsoftware.com/moreinfo) or call (866) 308-BEST.