

SAGE CRM SALESLOGIX

Sales

- SALES
- MARKETING
- CUSTOMER SERVICE
- SUPPORT

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

The screenshot displays the Sage CRM SalesLogix interface for an account named 'Abbott Ltd.'. The interface includes a navigation pane on the left with icons for Accounts, Contacts, Opportunities, Ticket List, Activities, Calendar, Library, Reports, and Campaigns. The main window shows account details such as 'Abbott Ltd.', 'Subsidiary', 'Mailing' (4208 North Grand Avenue, Suite 900, Chicago, IL 60643, USA), and contact information for 'Midwest' (Acct Mgr: Hogan, Lee). Below this is a 'Contacts' table listing individuals like John Abbott, Leo Ballo, Drew Dean, Duane Super, Mike Velazquez, and Louise Ziemer with their respective titles and phone numbers. At the bottom, there is a table for 'Opportunities' with columns for Name, Status, Est. Close, Potential (USD), Probability, and Days Open.

Contact Name	Primary	Work Phone	Mobile Phone	Title	City	State	Type	Status
Abbott, John	Yes	(312) 555-7854	(312) 555-1234	President	Chicago	IL	Decision Maker	Active
Ballo, Leo		(312) 555-7854	(312) 555-6845	VP of Sales	Chicago	IL	Champion	Active
Dean, Drew		(312) 555-7811	(312) 555-7755	VP of Customer Service	Chicago	IL	Champion	Active
Super, Duane		(312) 555-7054		CEO	Chicago	IL		Active
Velazquez, Mike		(312) 555-7854	(312) 955-8788	VP of Finance	Chicago	IL	Other	Active
Ziemer, Louise		(312) 555-7854	(312) 955-7777	CFO	Chicago	IL	Gate Keeper	Active

Opportunity Name	Status	Est. Close	Potential (USD)	Probability	Days Open
Abbott Ltd. Phase 1	Open	12/28/2002	\$2,281,100.00	25%	51
Abbott Ltd. Phase 2	Open	12/27/2003	\$150,000.00	10%	
Abbott Ltd. Phase 3	Open	5/31/2004	\$2,281,100.00	1%	

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 the Sage CRM SalesLogix account history.



Insight for Informed Business Decisions

Sage CRM SalesLogix provides the insight for informed business decisions and the management tools to implement them. 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.

Advanced Flexibility to Match the Way You Work

Tailor the design and functionality of Sage CRM SalesLogix to mirror your unique customer acquisition, retention, and development processes. Easily manage team and territory assignments, user profiles, workflow, security controls, and administration roles.

Then, as your company grows and your business requirements change, Sage CRM SalesLogix provides the flexibility and scalability to grow and change with you.

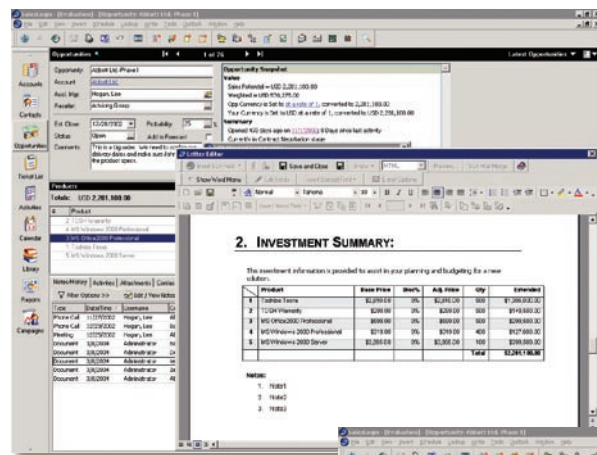
Truly Integrated CRM

Sage CRM SalesLogix provides a true 360-degree customer view, consolidating information from Sales, Marketing, Customer Service, and Support, and through integration with popular accounting and business management applications including Sage MAS 90, Sage MAS 200, and Sage MAS 500 from Sage Software.

Sage CRM SalesLogix can be accessed conveniently through multiple methods. Users can work online over a network or the Web, synchronize rapidly and work offline, or use wireless phones or PDAs for quick access to customer information in the field.

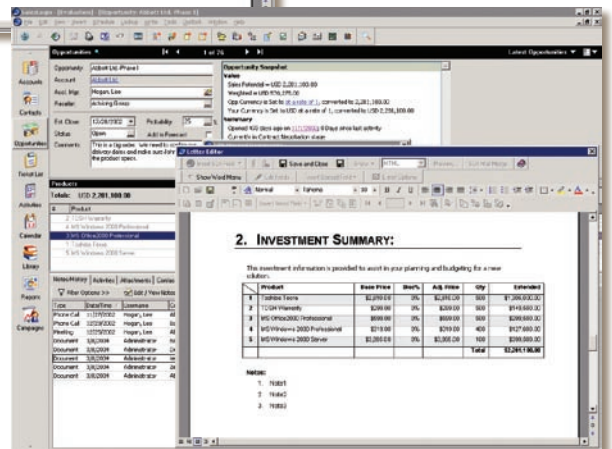
PRODUCT BENEFITS

- 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.



Track key data on opportunities and generate proposals including products, pricing, and discounts.

Use Crystal Reports to analyze your sales efforts and refine your strategy.



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 via 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 CRM SalesLogix

Sales

About Sage CRM SalesLogix

Sage CRM 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, 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 7,000 customers worldwide, is part of the Sage Software family of integrated business management solutions.

About Sage Software

Sage Software has been responding to the needs, challenges, and dreams of small and midsize businesses like yours for over 25 years. With a complete range of business management solutions and services, Sage Software helps companies improve customer relationships, reduce costs, and automate and integrate a variety of operational activities. Look to Sage Software for fully integrated business management applications that deliver high performance, advanced functionality, cross-product integration, and unmatched freedom of choice.

Sage Software solutions support the specialty needs of a broad scope of industry segments, including manufacturing, distribution, construction, real estate, nonprofit, and professional services. Today, over 2.4 million North American customers run Sage Software solutions. Its parent company, The Sage Group plc (London: SGE.L), supports 4.5 million customers worldwide and has revenues exceeding \$1 billion. Together, with its network of business partners, Sage Software provides the ongoing support and service small and midsize businesses need to achieve tangible business results.

For more information, please visit the Web site at www.sagesoftware.com or call **800-854-3415**.

For more information, go to:

www.saleslogix.com

Or contact your certified Sage CRM 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 CRM SalesLogix can help your business, go to:

www.saleslogix.com/demo



8800 N. Gainey Center Drive, Suite 200 • Scottsdale, Arizona 85258 • 800-643-6400 • www.saleslogix.com

©2005 Sage Software SB, Inc. All rights reserved. The Sage Software logo and the Sage Software product and service names mentioned herein are registered trademarks or trademarks of Sage Software SB, Inc., or its affiliated entities. Crystal Reports is the registered trademark and technology of Business Objects SA. All other trademarks are the property of their respective owners.

05-8354 10/05 5SLX013/0504