

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, Support, and Mobile solutions.

## FEATURES

Sage CRM SalesLogix Sales provides powerful sales automation and management tools to maximise 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 Wireless

## Sales

The screenshot shows the Sage CRM SalesLogix interface for an account named 'Abbott Ltd.'. The account details include:
 

- Account: Abbott Ltd. (Main: (312) 555-7854, Type: Customer)
- Division: Subidiary (Fax: (312) 555-7545, Sub-Type: Type A)
- Parent: Abbott Worldwide (Toll Free: (800) 555-1234, Status: Active)
- Address: 4206 North Grand Avenue, Suite 500, Chicago, IL 60643, USA (www.abbott.com)
- Industry: Communications
- Owner: Midwest, Acct.Mgr: Hogan, Lee

 Below the account details is a 'Contacts' table:
 

Contact Name	Primary	Work Phone	Mobile	Title	City	State	Type	Status
Albon, John	Yes	(312) 555-7854	(312) 555-1234	President	Chicago	IL	Decision Maker	Active
Balbo, Lou	No	(312) 555-7854	(312) 555-6845	VP of Sales	Chicago	IL	Champion	Active
Drew, Dean	No	(312) 555-7843	(312) 558-7755	VP of Cust Service	Chicago	IL	Champion	Active
Velasquez, Mike	No	(312) 555-7854	(312) 555-8768	VP of Finance	Chicago	IL	Other	Active
Zessner, Louise	No	(312) 555-7854	(312) 555-7777	COO	Chicago	IL	Gate Keeper	Active

 At the bottom, there is a summary table:
 

Opportunity Name	Status	Est. Close	Potential
Abbott Ltd -Phase1	Closed - Won	3/25/2006	\$2,129
Abbott Ltd -Phase2	Open	7/25/2006	\$199
Abbott Ltd -Phase3	Open	9/30/2006	\$749

 A mobile device (BlackBerry) is overlaid on the bottom right, displaying the 'SALESLOGIX Mobile' app interface with icons for Accounts, Contacts, and Opportunities.

Sage CRM SalesLogix is organised and easy to use, putting the information and resources you need to close sales at your fingertips, including mobile access through both BlackBerry™ and Pocket PC™ devices.

### A Single Source for Customer Information

Sage CRM 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 organisation 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 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 personalised communications to individual customers or groups of prospects using customised 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-mails, and manage calendars using Microsoft Outlook from within Sage CRM SalesLogix, and record the activity to the Sage CRM SalesLogix account history.

## PRODUCT BENEFITS

Increase productivity by automating key aspects of the sales cycle.

Maximise team selling effectiveness with advanced sales tools and resources.

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

Customise 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 CRM 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 analyse 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.

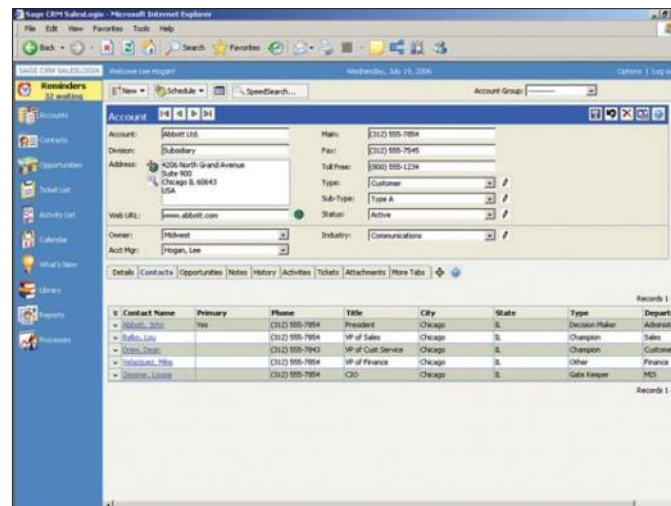
## Truly Integrated CRM

Sage CRM 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 CRM 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 CRM SalesLogix, they can view all relevant customer data, such as credit status, terms, and account balance so they can better service customers.

## The Information You Need, How You Need It

Sage CRM SalesLogix Sales can be accessed conveniently via multiple methods. Users can work online over a network or the Web, synchronise rapidly and work offline, or use wireless phones or PDAs for quick access to customer information in the field. Users can be more productive, as they always have access to the same rich, full-featured information and functionality.



The Sage CRM SalesLogix Web client provides users with anytime, anywhere access to Sage CRM 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 CRM 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

### Opportunity Management

Track probability of close, products, lead source, status, and competitors

Generate sales proposals automatically reflecting native customer currency

### Real-time Interactive Dashboards

View performance metrics, diagnose key issues, and identify opportunities from a single location

Analyse 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

Analyse 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 personalise 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

Synchronise rapidly and work offline, or work online over a network or the Web

Utilise 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

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

## 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 maximising 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, and Mobile 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 7,300 customers worldwide, is part of the Sage Software family of integrated business management solutions.

## About Sage Ireland

Sage Ireland Limited offers leading business management software and services that support the needs, challenges and dreams of more than 50,000 small and mid-sized business customers in the Ireland. Its parent company, The Sage Group plc (London: SGE.L), supports 5.0 million customers worldwide.

For more than 25 years, Sage has delivered easy-to-use, scalable and customisable software for accounting, customer relationship management, human resources, time tracking and the specialised needs of accounting practices and the construction, distribution, manufacturing, nonprofit and real estate industries. For more information, please visit the website at [www.pims.ie](http://www.pims.ie).

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To register for an online demonstration to see how Sage CRM SalesLogix can help your business go to: [www.saleslogix.com/edemo](http://www.saleslogix.com/edemo)

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