Sage SalesLogix

Getting Started with Sage SalesLogix

Version 8.0

Developed by Sage SalesLogix User Assistance

sage

Getting Started with Sage SalesLogix

Documentation Comments

This documentation was developed by Sage SalesLogix User Assistance. For content revisions, questions, or comments, contact the Sage SalesLogix writers at saleslogix.techpubs@sage.com.

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Version

Version 8.0 10/31/2012

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Technical Support is available to customers with support contracts directly from Sage Software and to Certified Business Partners. Calls are answered during business hours, Monday through Friday, excluding holidays. Current contact information is available on the Sage SalesLogix Web site: http://www.sagesaleslogix.com

Partners with a valid technical support contract and a Web access code can request technical support electronically on the Sage SalesLogix Partner Support Portal Web site: partners.sagenorthamerica.com.

Customers with a valid technical support contract and a Web access code can request technical support electronically on the Sage SalesLogix Customer Support Portal Web site: customers.sagenorthamerica.com.

Revisions to this book are available through both Portal Web sites. Check regularly for current Sage SalesLogix product documentation.

Contents

Introduction 1
- Why Use Sage SalesLogix? 1
- Key Features 1
- About This Guide 2
- Related Documentation 2

Chapter 1 Understanding the Sage SalesLogix Client Workspace 3
- Logging on to the Sage SalesLogix Client 3
- Working in the Sage SalesLogix Client 4
- Understanding the Workspace Features 4
  - Using List Views 6
  - Using Detail Views 8
  - Using Split Views 9
- Getting Help 9

Chapter 2 Managing Contacts and Accounts 11
- Adding a Contact and Account 11
- Understanding Account Ownership 11
- Adding an Account Association 14
- Working with the Library 15
- Requesting Literature for a Contact 15
- Scheduling a Follow-up Activity 16
- Adding a Note 17

Chapter 3 Managing Your Sales Activities 19
- Using Activities and Events 19
- Activity Reminder 19
  - Using the Activity Reminder buttons 20
- Completing an Unscheduled Activity 21
- Inviting Others to a Meeting 22
- Using the Calendar 23
- Using the Activities View 24
- Viewing a History of Interactions with an Account 25

Chapter 4 Communicating with Contacts and Leads 27
- Setting E-mail Options 27
- Working with Templates 28
- Creating a New Template 29

Using Mail Merge 29
Using Outlook Integration 30
Chapter 5 Managing Opportunities for Sales 33
Adding a New Opportunity 33
Using Opportunity Statistics 35
Closing an Opportunity 35
Closing an Opportunity 36
Chapter 6 Managing Leads and Campaigns 37
Working with Leads 37
Adding a Lead 37
Importing Leads 39
Qualifying a Lead 40
Working with Campaigns 41
Adding a Campaign 41
Adding Targets to a Campaign 42
Adding Campaign Stages and Tasks 42
Adding Products to a Campaign 44
Launching a Campaign 45
Tracking Campaign Responses 45
Chapter 7 Working with Customer Service and Support 47
Working with Contracts 47
Understanding Contract Types 47
Adding a Contract 48
Working with Tickets 49
Adding a Ticket 49
Adding Ticket Activities 51
Punching In and Out of a Ticket 52
Closing a Ticket 52
Working with Returns 53
Adding a Return 53
Adding Products and Shipping Details to a Return 54
Closing a Return 55
Working with Defects 56
Adding a Defect to an Existing Ticket 56
Closing a Defect 57
Chapter 8 Using Reporting and Analysis Tools 59
Using the Reports View 59
Working with the Sales Dashboard 60

Understanding Dashboard Features 60
Using the Activities Area 61
Using Content Sets 61
  Changing Content Set Parameters 61
Using Analysis Views 62
  Changing Analysis View Filters 62
Chapter 9 Using Sage SalesLogix Away from the Office 65
Understanding Synchronization 65
Synchronizing with the Main Office Database 65
Reviewing Synchronization Changes 66
Understanding Conflict Resolution 66
Understanding Subscription 67
Index 69

Introduction

Sage SalesLogix is a leading customer relationship management solution that enables small to medium-sized businesses to acquire, retain, and develop profitable customer relationships through integrated Sales, Marketing, Customer Service, and Support automation solutions.

Why Use Sage SalesLogix?

The Sage SalesLogix Client helps you manage all aspects of the sales cycle and the customer relationship. In addition to tracking contacts, accounts, opportunities, tickets, and activities, users have access to tools for reporting, automating processes, and creating e-mails, faxes, and letters using mail merge.

Key Features

The following key features describe how you can use the Sage SalesLogix Web Client:

Contact, Account, and Opportunity Views - Use the Contact, Account, and Opportunity views to manage detailed information about your contacts, accounts, and opportunities.

Calendar and Activities - Use the Calendar to view open and completed activities and events. Use the Activities view to manage such daily activities as scheduling phone calls, meetings, and events.

Lookups - Use lookups to search for records or build groups. Lookups enable you to filter your record list, and then save the results as a new group. Lookup options vary by record type.

Groups - Use groups to organize your contacts, accounts, opportunities, tickets, and other data based on common characteristics. Groups can be used for reporting, mail merges, and more.

Campaigns and Leads - Use Leads to develop and qualify new Contacts and Accounts. Use the Campaign functions to combine advertising, public relations, sales promotion, and selling activities to achieve sales or marketing goals.

Mail Merge - Use Mail Merge when you need to communicate with a group of contacts, accounts, opportunities, or leads.

Reports and Analysis - Use Reports and filters to summarize information about your contacts, accounts, opportunities, contracts, and tickets. The Sage SalesLogix Dashboard view allows you to display performance and analysis information in a dashboard format.

Customer Service and Support - Use tickets to track, qualify, and resolve customer questions and issues. You can track time spent working on a ticket through Punch in/Punch out, create ticket activities that are charged against the customer’s service contract, and schedule calendar activities. The Service and Support features also provide a means of tracking defects in products or services, and include a return process.

Literature Requests - Use literature requests to schedule sending marketing material or other documents to contacts. Literature requests are generally paper materials that must be mailed.

Library - Use the Library as a central repository for your company information. The Library often contains items such as product information, sales literature, and presentations.

Processes - Use processes to execute a series of tasks in a specific sequence over a set time period. The Sage SalesLogix Client offers Sales Processes and Contact Processes.

Advanced Outlook Integration - Use Advanced Outlook Integration to access Microsoft Outlook when sending e-mail, scheduling activities, and managing contacts. This feature must be enabled by your system administrator.

Onsite and Remote Access - Use Sage SalesLogix in your office or from a remote location.

About This Guide

The purpose of this guide is to help you begin using the Sage SalesLogix Client. This guide uses scenarios to demonstrate how to use the Sage SalesLogix Client for many of your daily tasks.

You can access Sage SalesLogix on a network (while in the office) and remotely (from a laptop). The procedures described in each chapter are the same when you are using the Sage SalesLogix Client in the office or working remotely.

If your company has customized the Sage SalesLogix Client, the number, order, and appearance of dialog boxes and screens may be different than described. See your system administrator for more information.

? The Help symbol precedes online Help topic names where you can find additional information.

Related Documentation

- *Sage SalesLogix Quick Reference* cards provide commonly used shortcut keys, e-mail configuration options, and tips for working with groups and Outlook Integration. The *Sage SalesLogix Quick Reference* cards are accessible from the Start menu. Click Start, point to Programs, point to Sage SalesLogix, point to Documentation, and then click Customer Service and Support User Quick Reference or Sales and Marketing User Quick Reference.
- The *Sage SalesLogix Client Help* provides detailed information about all of the features available in the Sage SalesLogix Client, including additional information about Send SLX and Mail Merge.
- The *Sage SalesLogix Mail Merge Help* provides detailed information on the following: writing an e-mail message to a contact, writing an e-mail message, letter, or fax using a template, and using the Mail Merge engine to send correspondence to a group of contacts, accounts, etc. This help system also explains how to create and print address labels or envelopes, as well as, how to create, edit, and delete templates.

Help is available in each Sage SalesLogix application. Additional resources and documentation are available to Partners and Customers with a valid technical support contract at the Support Portal Web sites:

- Sage SalesLogix Partner Support Portal Web site: partners.sagenorthamerica.com.
- Sage SalesLogix Customer Support Portal Web site: customers.sagenorthamerica.com.

Chapter 1

Understanding the Sage SalesLogix Client Workspace

Take a few minutes to learn some of the Sage SalesLogix Client basics. It will help you become familiar with the workspace and navigation features.

In this chapter, you will learn to:

- Log on to the Sage SalesLogix Client
- Understand the Sage SalesLogix Client workspace
- Get more help

Logging on to the Sage SalesLogix Client

Before you begin, locate your User ID and password. If you do not have this information, contact your system administrator.

If a database connection was not configured during your Sage SalesLogix installation, you must create a new connection. See the "Logging on to the Sage SalesLogix Client" Help topic for detailed instructions.

To log on

1. Click **Start**, point to **Programs**, point to **Sage SalesLogix**, and then click **Sage SalesLogix Client**.
2. Type your **Username** and **Password**.
   Passwords are case-sensitive. In addition, your system administrator may set restrictions on using blank passwords, your user name as a password, and other options. If necessary, see your system administrator to discuss your password options.
3. In the **Log on to** box, select the database you want to use from the list.
   Your company may have more than one database. Be sure to select the correct database for the work you intend to do.
4. Click **OK**.
   The Activity Reminder appears when you have overdue activities, or if you need to confirm any activities. You can act on the listed activities, snooze them individually or as a group, or just close the reminder.

Working in the Sage SalesLogix Client

The workspace is the area where various views appear in the main Sage SalesLogix Client.

Some features require you to enable pop-ups. See your browser help for specific instructions on how to allow pop-ups.

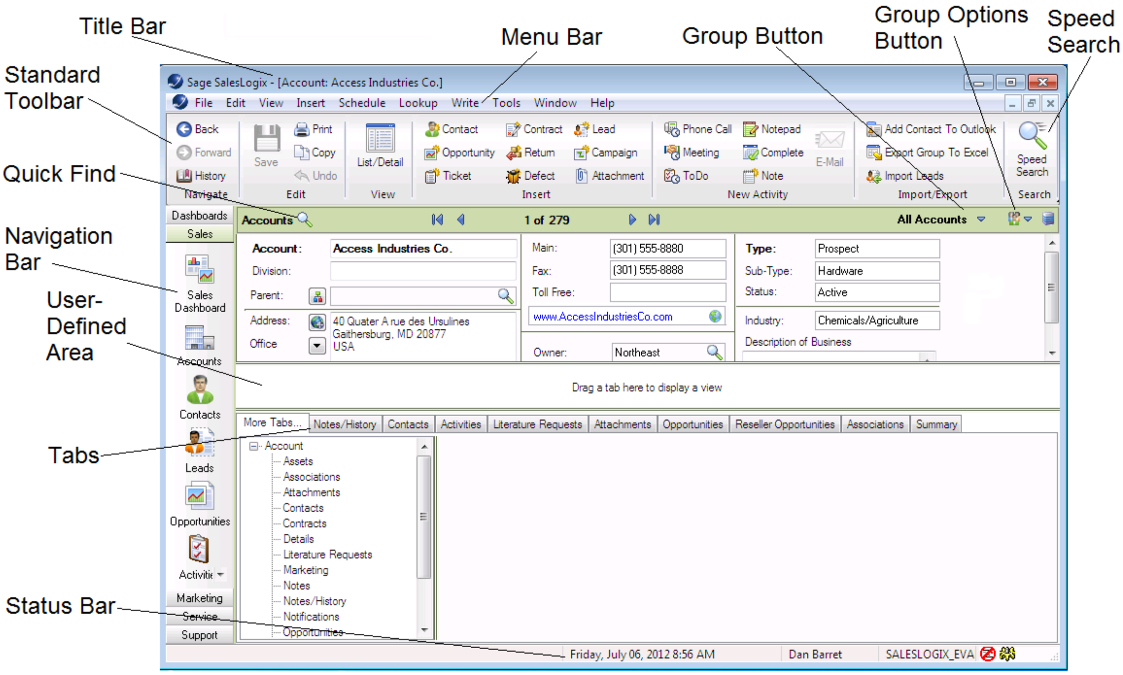

Title Bar
Menu Bar
Group Button
Group Options Button
Speed Search
Standard Toolbar
Quick Find
Navigation Bar
User-Defined Area
Tabs
Status Bar
Sage SalesLogix - [Account: Access Industries Co.]
File Edit View Insert Schedule Lookup Write Tools Window Help
Back Forward History Navigate
Save Print Copy Undo Edit
List/Detail View
Contact Opportunity Ticket Contract Return Defect Lead Campaign Attachment Insert
Phone Call Meeting ToDo Notepad Complete Note E-Mail New Activity
Add Contact To Outlook Export Group To Excel Import Leads Import/Export
Speed Search Search
Dashboards Sales
Sales Dashboard
Accounts
Contacts
Leads
Opportunities
Activities
Marketing
Service
Support
Accounts
1 of 279
All Accounts
Account: Access Industries Co.
Division:
Parent:
Address: 40 Quater A rue des Ursulines Gaithersburg, MD 20877 USA
Office
Main: (301) 555-8880
Fax: (301) 555-8888
Toll Free:
www.AccessIndustriesCo.com
Owner: Northeast
Type: Prospect
Sub-Type: Hardware
Status: Active
Industry: Chemicals/Agriculture
Description of Business
Drag a tab here to display a view
More Tabs... Notes/History Contacts Activities Literature Requests Attachments Opportunities Reseller Opportunities Associations Summary
Account
Assets
Associations
Attachments
Contacts
Contracts
Details
Literature Requests
Marketing
Notes
Notes/History
Notifications
Opportunities
Friday, July 06, 2012 8:56 AM
Dan Barret
SALESLOGIX_EVA

Figure 1 Sage SalesLogix Client Workspace

Understanding the Workspace Features

Each view in your Sage SalesLogix Client contains many of the following elements.

Your workspace may be different depending on your access rights or if your installation has been customized.

Element	Description
Title Bar	The title identifies the active view. When you are in a detail view, the title bar displays the name of the current record.
Menu Bar	The menu bar contains the Sage SalesLogix Client commands. Click a menu to expand it. Each menu item has an access key, which is the underlined letter in the item name. For example, to insert a new contact or account, you can open the Insert menu, then press C. Shortcut keys also appear to the right of some menu items; you can press these keys to activate the feature. For example, to schedule a phone call, press SHIFT + F3. For Windows 7 users, you must press the Alt key to see the underlined access letter.
Standard Toolbar	Also called the toolbar, the Standard toolbar contains buttons that you click to open the most frequently used Sage SalesLogix commands. To move the toolbar, drag it to another part of the window. From the View menu, you can show or hide toolbars.
Navigation Bar	Located on the left side of the Sage SalesLogix Client workspace, the Navigation Bar contains buttons that open the main Sage SalesLogix Client views. Your administrator can group the buttons into Navigation Group subsets that focus on specific elements of your business, such as Sales or Support. For example, the Support group contains Contacts, Tickets, Defects, Activities, Calendar, and Reports.
Speed Search	SpeedSearch helps you find information stored in the Sage SalesLogix database. For example, you can search through existing tickets or procedures to help solve a customer's problem, or search for a specific document, like a sales presentation.
Quick Find	The Quick Find button, located in the upper left corner of the view can be used to search for a particular contact, account, opportunity, ticket, lead, campaign, defect, contract, or return.
Previous/Next	Buttons located on the toolbar that allow you to view a previous or next contact, account, or opportunity. These buttons become active when you have viewed more than one contact, account, or opportunity during a single Sage SalesLogix Client session.
Group Button	Located opposite the Quick Find, third from the right on list and detail views, displays a tree view of all groups. You can double-click a group in the tree view to open that group.

Element	Description
Group Options	Located second from right on the on the list and detail views, click the Group Options button to display a menu of options of all groups.
Tabs	Tabs organize information on many of the list views, detail views and dialog boxes.
Tree Views	Tree views are lists of items organized into categories. Click to expand or collapse the tree view.
Pick Lists	A pick list is a set of values you can select from when entering data. Pick lists are useful because they encourage consistent data entry. Your access rights determine if you can add, edit, or delete pick list items. To open a pick list, click the ellipsis button in the box. You may need to click once in the box before the ellipsis button appears.
Lookup Labels	Detail views contain pre-defined label lookups. When you rest your mouse pointer on a label, it becomes a button that you can click to perform a lookup.
Shortcut Menus	Right-click in many Sage SalesLogix views to get a menu of features available for that area.
F8	Use F8 to switch between the Split view open or closed.
Shift F9	Use Shift + F9 in some memo fields to insert a Name/Date/Time stamp in a text box.
Status Bar	The status bar displays the current date, user, database, and status icons, such as whether or not you are logged in to e-mail. Right-click an icon to open a shortcut menu. You can show or hide the status bar by opening the View menu and clicking Status Bar.

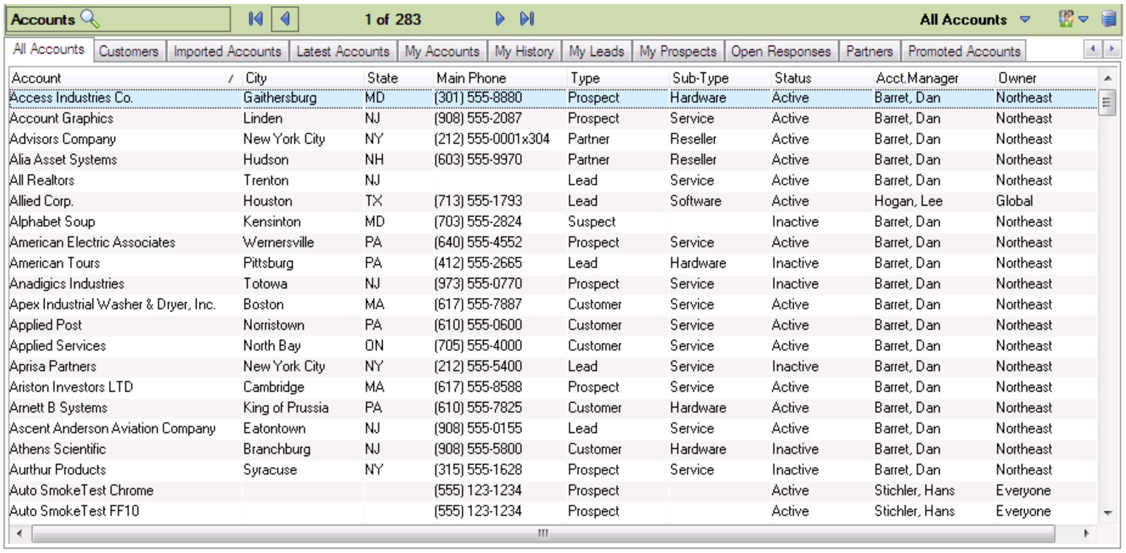
Using List Views

List views display information in a list with columns and rows of information. Press F8 from any detail view to display the corresponding list view. Each tab in the list view contains a group of contacts, accounts, opportunities, or tickets and so on.

- You can customize the List view by sorting information in the columns, rearranging the order of columns, and adjusting column widths.

  For more information, see the "Columns" topic in the Sales Client help.

- You can right-click in a List view to open the shortcut menu for options such as adding and deleting group members



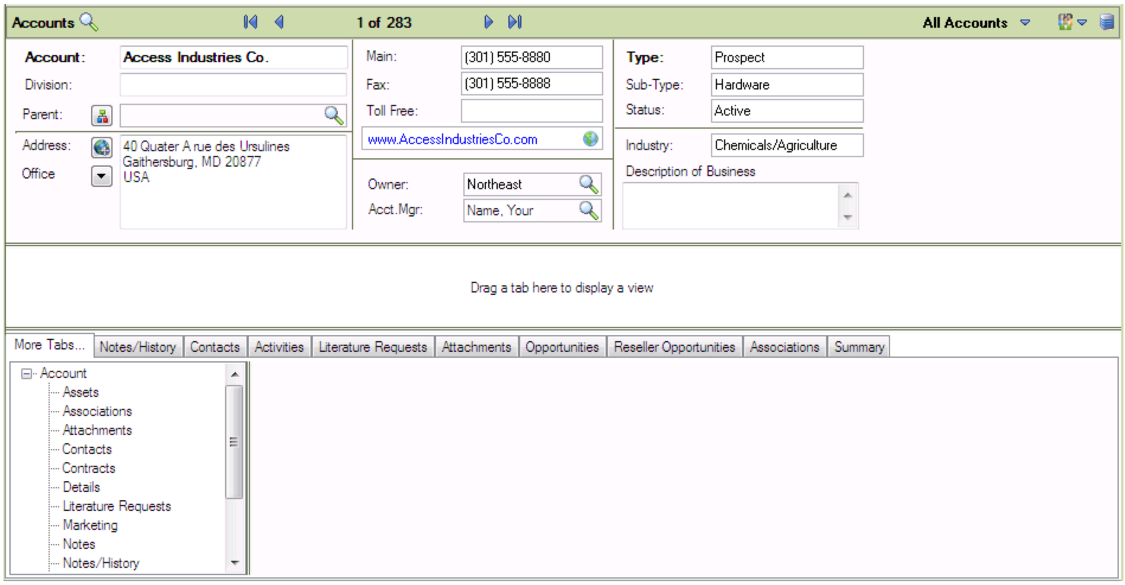
Account	City	State	Main Phone	Type	Sub-Type	Status	Acct.Manager	Owner
Access Industries Co.	Gaithersburg	MD	(301) 555-8880	Prospect	Hardware	Active	Barret, Dan	Northeast
Account Graphics	Linden	NJ	(908) 555-2087	Prospect	Service	Active	Barret, Dan	Northeast
Advisors Company	New York City	NY	(212) 555-0001x304	Partner	Reseller	Active	Barret, Dan	Northeast
Alia Asset Systems	Hudson	NH	(603) 555-9970	Partner	Reseller	Active	Barret, Dan	Northeast
All Realtors	Trenton	NJ		Lead	Service	Active	Barret, Dan	Northeast
Allied Corp.	Houston	TX	(713) 555-1793	Lead	Software	Active	Hogan, Lee	Global
Alphabet Soup	Kensinton	MD	(703) 555-2824	Suspect		Inactive	Barret, Dan	Northeast
American Electric Associates	Wernersville	PA	(640) 555-4552	Prospect	Service	Active	Barret, Dan	Northeast
American Tours	Pittsburg	PA	(412) 555-2665	Lead	Hardware	Inactive	Barret, Dan	Northeast
Anadigics Industries	Totowa	NJ	(973) 555-0770	Prospect	Service	Inactive	Barret, Dan	Northeast
Apex Industrial Washer & Dryer, Inc.	Boston	MA	(617) 555-7887	Customer	Service	Active	Barret, Dan	Northeast
Applied Post	Norristown	PA	(610) 555-0600	Customer	Service	Active	Barret, Dan	Northeast
Applied Services	North Bay	ON	(705) 555-4000	Customer	Service	Active	Barret, Dan	Northeast
Aprisa Partners	New York City	NY	(212) 555-5400	Lead	Service	Inactive	Barret, Dan	Northeast
Ariston Investors LTD	Cambridge	MA	(617) 555-8588	Prospect	Service	Active	Barret, Dan	Northeast
Arnett B Systems	King of Prussia	PA	(610) 555-7825	Customer	Hardware	Active	Barret, Dan	Northeast
Ascent Anderson Aviation Company	Eatontown	NJ	(908) 555-0155	Lead	Service	Active	Barret, Dan	Northeast
Athens Scientific	Branchburg	NJ	(908) 555-5800	Customer	Hardware	Inactive	Barret, Dan	Northeast
Aurthur Products	Syracuse	NY	(315) 555-1628	Prospect	Service	Inactive	Barret, Dan	Northeast
Auto SmokeTest Chrome			(555) 123-1234	Prospect		Active	Stichler, Hans	Everyone
Auto SmokeTest FF10			(555) 123-1234	Prospect		Active	Stichler, Hans	Everyone

Figure 2 Account List View

Using Detail Views

Most records in Sage SalesLogix display information in both a List view and a Detail view. The Detail view consists of information boxes, tabs, and a user-defined middle section.

- The upper section shows basic information about the selected record. When you add a new record, dialog boxes guide you through entering the information that appears in the Detail view. To edit information, click the box you want to change.
- The middle section is called the user-defined area. You can use this area to keep the tab you use most often visible. To move a tab to the middle section, click one of the tabs in the bottom section, hold the mouse button, and drag the tab to this area. The tab will remain open in the user-defined area each time you use the Sage SalesLogix Client. If you want to change the tab in the middle section, select another tab and drag it to replace the current tab.
- The lower section contains a group of tabs. Each tab shows specific information you need for the related record. Your system administrator can create custom tabs for your company.



Accounts 1 of 283 All Accounts

Account: Access Industries Co.
Division:
Parent:
Address: 40 Quater A rue des Ursulines
Gaithersburg, MD 20877
USA
Office

Main: (301) 555-8880
Fax: (301) 555-8888
Toll Free:
www.AccessIndustriesCo.com
Owner: Northeast
Acct.Mgr: Name, Your

Type: Prospect
Sub-Type: Hardware
Status: Active
Industry: Chemicals/Agriculture
Description of Business

Drag a tab here to display a view

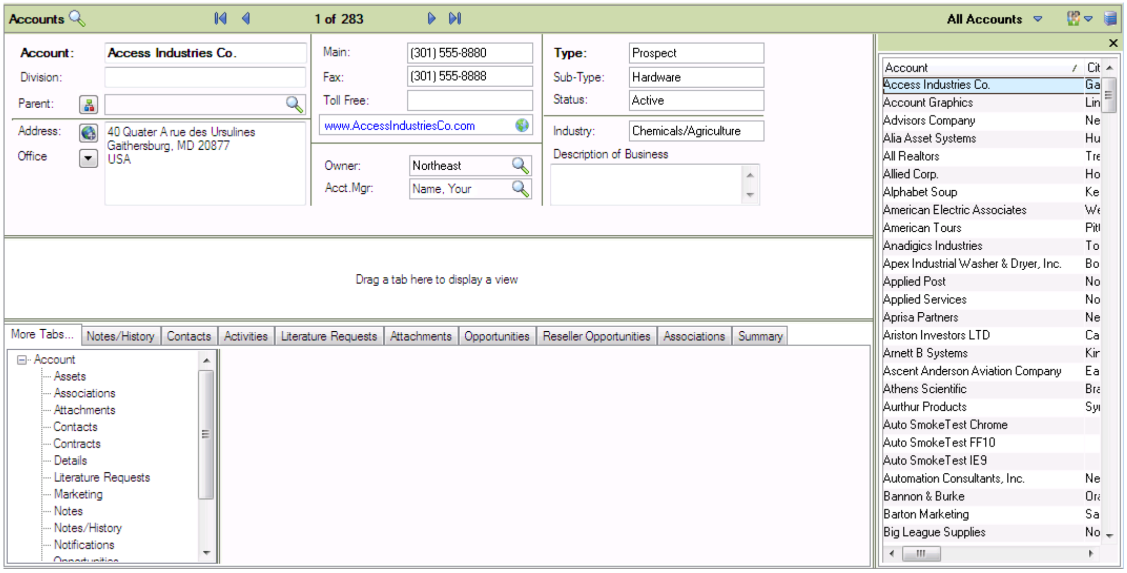
More Tabs...
Notes/History
Contacts
Activities
Literature Requests
Attachments
Opportunities
Reseller Opportunities
Associations
Summary
Account
Assets
Associations
Attachments
Contacts
Contracts
Details
Literature Requests
Marketing
Notes
Notes/History

Figure 3 Account Detail View

Using Split Views

Split views display information from both the Detail view and the List view. Using the Split view, you can click the account in the List view section of the screen and display its detail information in the other section of the screen. If you often switch between accounts, use the Split view to manage your information.

- Use **Ctr + F8** to switch between the Split view open or closed.


Accounts
1 of 283
All Accounts
Drag a tab here to display a view
More Tabs...
Notes/History
Contacts
Activities
Literature Requests
Attachments
Opportunities
Reseller Opportunities
Associations
Summary
Account
Assets
Associations
Attachments
Contacts
Contracts
Details
Literature Requests
Marketing
Notes
Notes/History
Notifications

Account: Access Industries Co.
Division:
Parent:
Address: 40 Quater A rue des Ursulines
Gaithersburg, MD 20877
USA
Office
Main: (301) 555-8880
Fax: (301) 555-8888
Toll Free:
www.AccessIndustriesCo.com
Owner: Northeast
Acct.Mgr: Name, Your
Type: Prospect
Sub-Type: Hardware
Status: Active
Industry: Chemicals/Agriculture
Description of Business

Account
Access Industries Co.
Account Graphics
Advisors Company
Alia Asset Systems
All Realtors
Allied Corp.
Alphabet Soup
American Electric Associates
American Tours
Anadigics Industries
Apex Industrial Washer & Dryer, Inc.
Applied Post
Applied Services
Aprisa Partners
Ariston Investors LTD
Arnett B Systems
Ascent Anderson Aviation Company
Athens Scientific
Aurthur Products
Auto SmokeTest Chrome
Auto SmokeTest FF10
Auto SmokeTest IE9
Automation Consultants, Inc.
Bannon & Burke
Barton Marketing
Big League Supplies

Figure 4 Account Split View

Getting Help

Information on advanced features and areas not covered in this guide is available in the Sage SalesLogix Client online Help topics.

To access online Help, do one of the following:

- Click the **Help** button on any screen in the Sage SalesLogix Client or if a Help button is not available, press **F1**.
- On the **Help** menu, click **Help Topics**.

What do you want to do?	Topic Name
Find out what new features have been added to the Sage SalesLogix Client.	What's New in This Release
Customize the Sage SalesLogix Client options for my personal needs.	Setting User Preferences
Access a graphic display of business process performance to perform in-depth data analysis	Displaying the Sales Dashboard
Schedule a meeting and invite others.	Scheduling or Editing an Activity
Schedule an Event (such as a trade show).	Scheduling or Editing an Event
Use the Activity Reminder	Activity Reminder

In addition to the Help, you can find more information from the following sources:

System Administrator See your system administrator for answers specific to your Sage SalesLogix installation.

Sales Support To access the Sage SalesLogix Web site, click SalesLogix Online on the Help menu.

Training Sage SalesLogix offers training programs designed to meet your needs. Please contact training.crm@sage.com for more information about available Web-based and classroom-based training options.

Technical Support To access the Sage SalesLogix Support Online Web site, click SupportOnline on the Help menu. The site requires a designated caller with a current support contract.

Chapter 2
Managing Contacts and Accounts

This chapter introduces you to the core of Customer Relationship Management (CRM) - working with contacts and accounts.

- Contacts are the key people associated with an account.
- Accounts are your prospects and customers. Accounts can contain one or many contacts.

You can use Sage SalesLogix to manage contact and account information. This includes daily interactions, such as phone calls, meetings, action items, or other correspondence.

In this chapter, you will learn to:

- Add a contact and an account
- Create an account association
- Use the Library
- Schedule a literature request
- Add a note and schedule a follow-up activity

Adding a Contact and Account

Sage SalesLogix focuses on account relationships. Therefore, all contacts must be attached to an account. Account and contact information is accessible by any Sage SalesLogix user who has the appropriate security. For example, you can create an account for Beeker Motors. Your Sales Assistant may not have the required security to access the account, but your Sales Manager can.

You cannot create personal accounts or contacts in Sage SalesLogix unless your system administrator enables this option for you. Personal contacts would include people such as your spouse or dentist.

Understanding Account Ownership

Before creating an account in Sage SalesLogix, it is important to understand account ownership.

- The *Account Owner* has access to an account and can use any account-related activities such as scheduling activities and running reports. An account owner can be an individual user, a team, or all Sage SalesLogix users.
  Access to account data can be different for each user. For example, if a team owns an account, some team members may have read-only access to the account, while others have read/write access. Security is controlled by your system administrator.
- The *Account Manager* is responsible for managing the relationship with the account. This can include follow-up phone calls, meetings, preparing proposals, and working with the account's contacts. The account manager is a single individual.

The individual user designated as the account owner is often also set as the account manager. If a team is the account owner, a team member will usually be set as the account manager. Account owners and managers should be assigned according to your company's guidelines.

There are several ways to add contacts and accounts to Sage SalesLogix. This guide will explain the most common methods.

Our scenario:

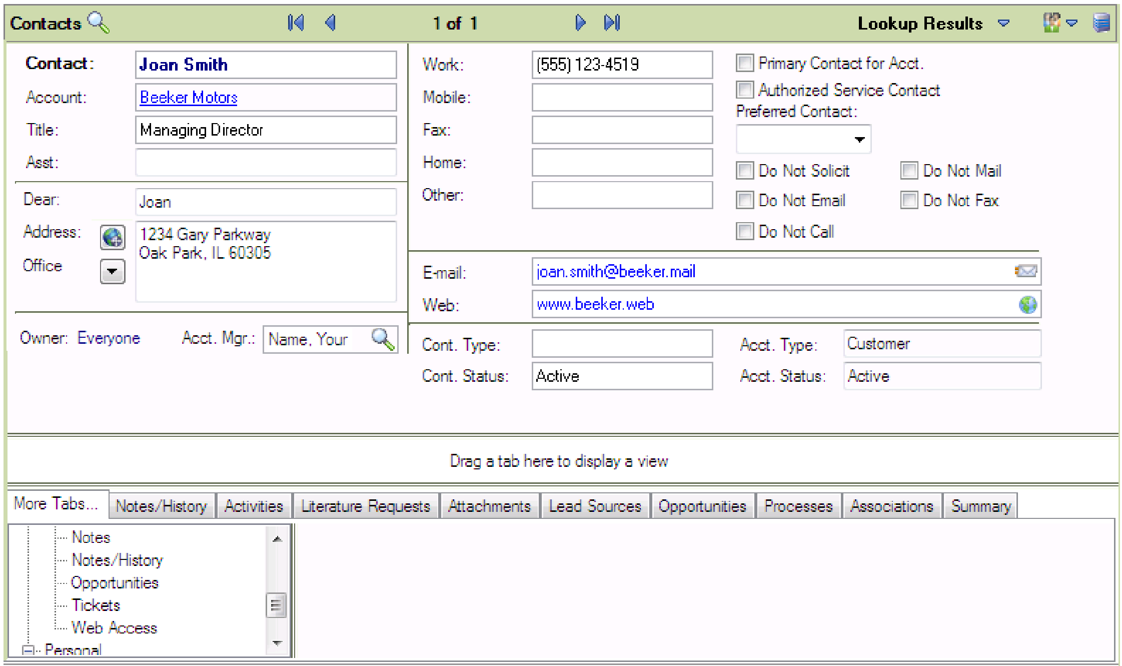
You met Tom Dale and Joan Smith at a trade show. Tom and Joan (contacts) work for Beeker Motors (account). First you will add contact Tom Dale to a new account (Beeker Motors); then you will add Joan Smith to an existing account (Beeker Motors).

To add contacts and an account

1. On the **Insert** menu, click **Contact/Account**.
2. In the **Add Contact/Account Information** dialog box, select **New Contact and New Account**, and then click **Next**.
3. In the **Contact** box, type **Tom Dale**.
   To add hyphenated last names or names with a professional designation, click the ellipsis button in the Contact box. Then use the Enter Name dialog box to specify a name prefix (such as Dr.), first name, middle name, last name, or suffix (such as C.P.A).
4. In the **Account** box, type **Beeker Motors**.
5. In the **E-mail** and **Web** boxes, add e-mail and Web address information.
   - E-mail - **tom.dale@beeker.mail**
   - Web: **www.beeker.web**
6. In the **Work Phone** field, type **5551234512**.
7. Click the **Look for Matching Records** button.
   This searches the database for records that have the same e-mail address, Web address, phone number, and account. It is important to search for records before adding information. If you do not check for existing information, you might create a duplicate contact or account.
8. Click **OK** to close the **No Matches** dialog box, or click **Cancel** to close the **Matching Records** dialog box.
9. In the **Contact Information** area, in the **Title** box, click the **ellipsis** button and select **Vice President**.
10. Continue to add Tom's information in the **Contact Information** section.
11. Under **Account Information**, double-click in the **Address** box to open the **Edit Address** dialog box and add the Address information for Beeker Motors, as follows:
    - Leave **Description** as **Office**.
    - In the **Address 1** box type **1234 Gary Parkway**
    - In **City**, **State/Prov**, **Zip/Postal** type **Oak Park**, **IL 60305**
12. Click **OK**.
13. In the **Main** box type **5551234500**.
14. Click the **Type ellipsis** button and select **Customer**.
15. Click the **Status ellipsis** button and select **Active**.
16. Click the **Industry ellipsis** button and select **Automotive/Aerospace**.
17. In the **Acct. Mgr.** box, click the **Find** button, and then select the account manager.
18. In the **Owner** box, click the **Find** button, and then select an owner.
19. In the **Lead Source** box, click the **Find** button, select **Trade Show** and then click **OK**.
20. Click the **Save & New** button.
    This option allows you to add another contact to the existing account.

21. In the **Contact** box, type **Joan Smith**.
22. In the **E-mail** and **Work Phone** boxes, add e-mail and Work Phone information.
    - E-mail - **joan.smith@beeker.mail**
    - Work Phone - **5551234519**
23. In the **Contact Information** area, in the **Title** box, click the **ellipsis** button and select **Managing Director**.
24. Click **OK**.

For more information see the "Adding a New Contact and Account" topic in the Sage SalesLogix Client Help.


Contacts
1 of 1
Lookup Results
Drag a tab here to display a view
More Tabs...
Notes/History
Activities
Literature Requests
Attachments
Lead Sources
Opportunities
Processes
Associations
Summary
Notes
Notes/History
Opportunities
Tickets
Web Access
Personal

Contact:	**Joan Smith**
Account:	Beeker Motors
Title:	Managing Director
Asst:	
Dear:	Joan
Address: Office	1234 Gary Parkway Oak Park, IL 60305
Owner:	Everyone
Acct. Mgr.:	Name, Your
Work:	(555) 123-4519
Mobile:	
Fax:	
Home:	
Other:	
E-mail:	joan.smith@beeker.mail
Web:	www.beeker.web
Cont. Type:	
Cont. Status:	Active
Acct. Type:	Customer
Acct. Status:	Active

☐ Primary Contact for Acct.
☐ Authorized Service Contact
Preferred Contact:
☐ Do Not Solicit
☐ Do Not Mail
☐ Do Not Email
☐ Do Not Fax
☐ Do Not Call

Figure 5 Contact Detail view showing Joan Smith's information

If you need to edit a contact or account’s information, you can do so by clicking the boxes on the Detail view and typing in the changes.

You must click the Save button after making any changes.

Adding an Account Association

Accounts may have a common connection, for example, one company may be a parent of another. You can create a relationship between accounts by adding an association. This association can be helpful for tasks like running reports. You can create one report for both accounts rather than two separate reports. Associations can also create opportunities for you to sell to parent companies rather than subsidiaries.

Our scenario:
Tom Dale told you that Beeker Motors was owned by International Machines. You want to create a parent/subsidiary relationship between the two accounts.

To associate accounts

1. Open the Beeker Motors Account Detail view.
    a. On the Navigation Bar, click **Accounts**.
    b. Click the **Accounts** Quick Find button (magnifying glass).
    c. In the **Find** box, type **be**, and then click the **Find** button
    d. In the list, click **Beeker Motors**.
2. On the Beeker Motors Account Detail view, click the **Associations** tab. If the tab is not visible, click the **More Tabs** tab.
3. Right-click in the tab view, and then select **Associate Account**.
4. In the **Account** box, type **Int**, and then click the **Find** button.
5. Click **International Machines** in the account list, and then click **OK**.
6. Click the **ellipsis** button below **Beeker Motors is a** and select **Subsidiary**.
7. Click the **ellipsis** button below **International Machines is a** and select **Parent**.
8. In the **Description** boxes, type a description for each account.
9. Click **OK**.

Working with the Library

The Library is a central repository for company information. Files are organized into folders and sorted by name. Click the column headings to sort the library files list.

Your company's library may include product information, policies and procedures, presentations, Web addresses, and so forth. Only the administrator and an administrative user can add files to the Library.

- If you are using Sage SalesLogix on a network, you can access a file directly from the Library without storing the file on your computer.
- Sage SalesLogix Remote users must request files from the Library. When Remote users synchronize, the request is sent to the server and the requested file is delivers during the synchronization.

Our scenario:
You want to use the Library to find current product information.

To access information from the Library

1. On the Navigation Bar, click **Library**.
2. In the tree view, click the "+" signs to expand the folder that contains the file you want to open.
3. Double-click the file to open.

For more information see the "Working with the Library" topic in the Sage SalesLogix Client Help.

Requesting Literature for a Contact

Literature requests involve sending marketing materials or other company documents to one or more contacts. Sage SalesLogix users or the system administrator manage the available literature. After you schedule a request, the person or group at your company responsible for literature fulfillment can fulfill and complete the request.

If you are making the request for a single contact, select the contact before you begin the following steps.

Our scenario:
Joan Smith requested information on a specific product at a trade show, but you had run out of brochures. You want to schedule a literature request to send the information to Joan.

To schedule

1. Open Joan Smith's Contact Detail view.
    a. On the Navigation Bar, click **Contacts**.
    b. Click the **List/Detail** button.
    c. Click the **Latest Contacts** group tab.
    d. In the list, double-click **Smith, Joan**.
2. On the **Schedule** menu, click **Literature Request**.

3. In the **Description** box, enter a brief description of the literature request.
    - Type **Lenovo ThinkPad sales brochure**.
4. Click the **Send by Calendar** button, select a date, and then click **OK**.
5. In the **Send via** (delivery method), and **Priority** boxes, click the **ellipsis** button, select **FedEx** and **Medium**.
6. In the **Cover** box, click the folder button, choose the appropriate cover letter or memo from the list, and then click **OK**.
7. In the **Request for** area, make sure the option of **Current Contact (Smith, Joan**) is selected.
8. Under **Print literature list**, select **with cover letter**.
9. In the **Available Literature** area, select the items you want to include in your request.
    a. Expand **Hardware**.
    b. Select **Lenovo ThinkPad Brochure**.
    c. Double-click the document to set the quantity for each. Use the default of 1 or type a number, and then click **OK**.
10. Click **OK**.

The literature request is recorded on the Literature in the Activities view and on the Literature Requests tabs in the Contact and Account Detail views.

The person assigned by the administrator to monitor Literature Requests will receive your request and should fulfill it by the date you specified.

Scheduling a Follow-up Activity

In Sage SalesLogix, phone calls, meetings, to-dos, and personal appointments are called activities. Scheduling follow-up activities can help you organize and remember important events.

Our scenario:
You want to schedule a phone call to follow-up on literature that was sent to Joan Smith.

To schedule a phone call

1. Open Joan Smith’s Contact Detail view.
2. On the **Schedule** menu, click **Phone Call**.
    a. If prompted, in the **Lookup** box, select **Smith, Joan**, and then click **OK**.
    b. If prompted, in the **Regarding** box, select **Confirm Literature Received**, and then click **OK**.
3. In the **Start Time** box, click the **Calendar** button to select the date and time when the activity will occur, and then click **OK**.
4. Do one of the following:
    - Select the **Timeless** check box to create an activity that occurs on a specific date, but at no specific time and without a specific duration.
      Timeless activities are displayed on the Calendar day view.
    - In the **Duration** boxes, set the expected length of time for the activity.

5. Select the **Alarm** check box to set an alarm to notify you before the activity begins. Use the drop-down boxes to select the number of minutes, hours, or days. You must enter an increment between 1 and 240.
6. Verify the **Name** and **Account** boxes contain **Joan Smith** and **Beeker Motors**. If any information is incorrect, click the Find button to change the information.
7. In the **Notes** box, type **Follow-up call for Joan Smith's literature request**.
8. If you have not selected an item for the **Regarding** box, click the **ellipsis** button and select **Confirm Literature Received**.
9. Click **OK**.

You can view the scheduled phone call in the Contact and Account Detail views (on the Activities tab), in the Activities view (on the All Open and My Activities tabs), and in the Calendar view. If your company uses Advanced Outlook Integration, the activity is scheduled in your Outlook calendar.

For more information see the "Scheduling or Editing an Activity" topic in the Sage SalesLogix Client Help.

Adding a Note

You use notes to document the outcome of an activity and to record interactions with an account, contact, lead, or opportunity. The notes you add appear in the Notes/History tab on the Account, Contact, Lead, and Opportunity Detail views.

There are several ways to add a note. One method was chosen for the example below.

Our scenario:
You found Tom Dale's business card while cleaning out your briefcase. You had a note on the back indicating Tom was interested in a support contract for any products his company purchased. You want to add this information to Sage SalesLogix.

To add a note

1. Open Tom Dale's Contact Detail view.
2. On the **Insert** menu, click **Note**.
3. If necessary, modify the **Completed** and **Scheduled** dates. Click the **Calendar** button, select a date, and then click **OK**.
4. If you need to enter a duration for the note, clear **Timeless**, and then select or enter a **Duration**.
5. Verify the **Name** is **Tom Dale** and the **Account** is **Beeker Motors**.
6. In the **Regarding** box, type **Business card notes**.
7. In the **Location** box, type **2012 Trade Show**.
8. In the **Notes** box, type the information on the business card.
9. In the **Priority** box, click the **ellipsis** button and select an item from the list.
10. In the **Category** box, click the **ellipsis** button and select an item from the list.
11. Verify that your name is in the **Leader** box.
12. If necessary, click the **Attachments** tab to add a document or URL.

13. Use the **Carry Over Notes** or **Carry Over Attachments** check boxes to copy notes or attachments from this note to the follow-up activity.
14. Click the **To-Do** button.
15. In the **Schedule To-Do** dialog box, schedule an activity for today.
    a. For the **Regarding** type **Research**.
    b. In the **Notes** type, **Research a support contract for Beeker Motors**.
    c. Click **OK** to schedule the activity.
16. After scheduling the to-do, click **OK** to save the note.

You can view notes on the Notes/History tab of the Contact, Account, Lead, and Opportunity Detail views. In addition, the Notes/History tab allows you to view and filter notes and other history items.

For more information see the "Adding a Note" topic in the Sage SalesLogix Client Help.

Chapter 3

Managing Your Sales Activities

Sage SalesLogix can help you manage your daily activities, whether they are scheduled or unscheduled. Scheduled activities include phone calls, meetings, to-dos, and appointments. Unscheduled activities, such as returning a phone call or answering e-mail, may occur several times a day.

In this chapter, you will learn to:

- Use Activity Reminder
- Complete an unscheduled activity and schedule a meeting
- Use the Calendar and Activities views
- View the history of an account

Using Activities and Events

Activities and Events provide a way to stay on top of your work responsibilities.

- Events usually span several days and might include trade shows, business trips and conferences.
- Activities include placing phone calls, attending meetings, and to do's, such as sending correspondence or preparing presentations.
- Activities can be associated with contacts, accounts, leads, opportunities, or tickets. Activities are generally scheduled for a specific time, but can also be scheduled as "timeless" activities. Completed activities become history items.
- You can schedule activities during an event, such as setting up various appointments and meetings for a business trip.

When you schedule an activity, it displays on the Calendar, Activities view, and in the Activities tabs on the Account, Contact, Opportunity, Lead, and Ticket views. Events display on the Activities view, Events tab and Calendar as well. The Sage SalesLogix Client includes an Activity Reminder feature that alerts you to overdue activities and new activities that you have yet to confirm.

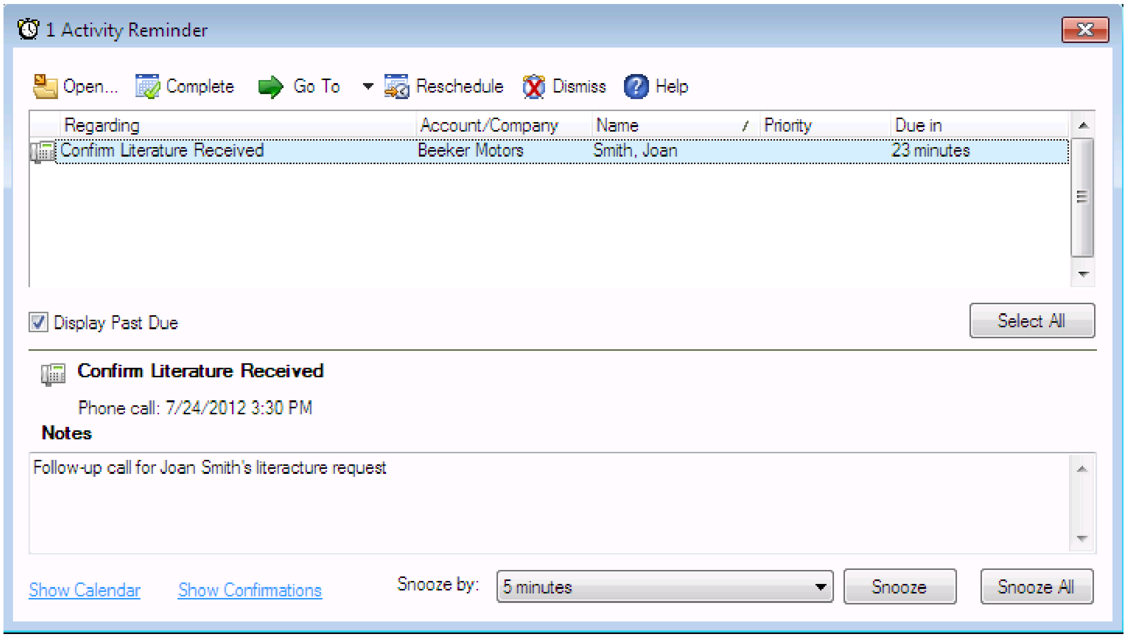
Several activity types are available to accommodate your work requirements. For instance, you can create general activities, recurring activities and more. In general, you can edit, delete, or complete activities and events that you create.

Activity Reminder

The Activity Reminder helps you keep track of any activities (scheduled, timeless, unconfirmed, or recurring) that have a reminder setting. When any of your activities are overdue or if you need to confirm any activities, the Activity Reminder will display. When the Activity Reminder displays, you can choose to act on the listed activities, or be reminded of the activities at a later time.

Closing the Activity Reminder snoozes all of the alarms and activity reminders in the Activity Reminder window.

Current activities are listed first, followed by past due activities in red text, and finally unconfirmed activities in bold. To display past due activities that do not have alarms set, select the Display Past Due check box. Notes for the activity selected in the grid appear in the Notes box below the activities list.



Regarding	Account/Company	Name	Priority	Due in
Confirm Literature Received	Beeker Motors	Smith, Joan		23 minutes

☑ Display Past Due

Confirm Literature Received

Phone call: 7/24/2012 3:30 PM

Notes

Follow-up call for Joan Smith's literacture request

Snooze by: 5 minutes

Figure 6 Activity Reminder dialog box

Using the Activity Reminder buttons

Select an activity, and then use these buttons:

Button	Description
Open	Opens the Schedule activity window. If the selected activity is unconfirmed, the Confirmation dialog will open.
Complete	Opens the Complete Activity dialog.
Go To	Presents a list of associated detail views for the selected activity, and opens the selected view. Depending on the activity type, the list may include Account, Contact, Lead, Opportunity, or Ticket views.
Reschedule	Opens a Reschedule Activity dialog, allowing the activity leader (creator) to reschedule an activity or a group of activities.
Dismiss	Turns off the alarm for the selected activity or activities. The activity remains on the Activities list view, but the alarm is reset to 'off'. (Not the same as Snooze, which temporarily disables the alarm.)
Help	Opens the Help topic for the Activity Reminder.
Snooze	Removes the selected activities from the reminder window for the amount of time selected in the **Snooze by:** box.
Snooze All	Closes the reminder window (Snoozes all of the activities) for the amount of time selected in the **Snooze by:** box.

Completing an Unscheduled Activity

Unscheduled activities can occur unexpectedly throughout the day. It is a good idea to keep Sage SalesLogix open at all times so you can quickly access contact and account information. After you respond to an unscheduled activity, you should complete the activity in Sage SalesLogix to create a record of the interaction with the contact or account.

When you complete an activity, details about it are recorded on the Notes/History tab for the related account, contact, opportunity, or lead.

Our scenario:

You received an unexpected call from Tom Dale about a sales opportunity. You need to complete an activity for the unscheduled phone call and schedule a follow-up meeting.

There are several ways to complete an activity in Sage SalesLogix. The following method allows you to complete the activity, schedule a follow-up meeting, and carry over the notes.

To complete an unscheduled activity

1. Open Tom Dale’s Contact Detail view.
2. On the **Schedule** menu, select **Complete Activity**.
3. Select **Phone Call**, and then click **OK**.
4. The **Completed** and **Scheduled** boxes automatically show the current date and time. You can accept the default, or select a new date and time.
5. In the **Regarding** box, click the **ellipsis** button and select **Discuss Opportunities** from the list.
6. In the **Notes** box, type **Tom Dale called about a possible sales opportunity.**
7. To schedule a follow-up activity
    a. Select **Carry Over Notes** to include your notes in the follow-up activity.
    b. Click the **Meeting** button.
8. In the **Schedule Meeting** dialog box, verify that the **Notes** field includes the notes from the phone call.
9. Select a date and time for the meeting, and then click **OK** to schedule the follow-up meeting
10. Click **OK** to complete the phone call.

For more information see the "Completing an Activity" topic in the Sage SalesLogix Client Help.

Inviting Others to a Meeting

When you schedule or edit a meeting or a phone call in the Sage SalesLogix Client, you can include other Sage SalesLogix users in the activity. These types of appointments appear on the Confirmations tab in your Activities view. You can accept or decline activities listed on the Confirmations tab.

If you company uses Advanced Outlook Integration, you can include non-Sage SalesLogix users in the activity. The Microsoft Outlook Attendee Availability tab appears instead of the Members and Resources tabs.

Our scenario:
You want to invite a co-worker (from your company) to your meeting with Tom Dale (a contact for Beeker Motors).

To invite others to a meeting

1. Open Tom Dale’s Contact Detail view.
2. Click the **Activities** tab.
3. In the list, open the meeting you scheduled in the previous scenario.
4. Click the **Members** tab.
5. In the **Available Members** list, select a user, and then click **Add**.
   If you are using Advanced Outlook Integration, click Invite Others and select a user from the Outlook Address list.
6. Click **OK**.

The other user wil receive an Activity Reminder to confirm the activity. If the other user uses Sage SalesLogix on a network with Advanced Outlook Integration, he or she will receive an Outlook e-mail message to accept or decline the meeting. After the user confirms or declines the meeting, you will receive a confirmation of the response.

For more information see the "Scheduling or Editing an Activity " topic in the Sage SalesLogix Client Help.

Using the Calendar

Use the Calendar to manage your time and keep track of scheduled activities and events. The Sage SalesLogix Calendar displays both open and completed activities and events, depending on your calendar options.You can view your schedule by the day, week, month, or year view. Use the calendar right-click menu to schedule, edit, complete, or delete activities and events.

Your calendar security determines whose activities you can schedule, view, edit, complete or delete.

Depending on your access rights, you can view the calendars and activities of other Sage SalesLogix users. You can assign specific colors to each user to help you to determine which activities belong to which users. If an activity is scheduled for multiple users and you are the leader or member, it will display your color. If you are not an activity member or leader, then the activity leader's color will be displayed.

If your company uses Microsoft Outlook, you can view your Outlook calendar in Sage SalesLogix instead of the Sage SalesLogix calendar. To select this option, on the Tools menu, click Options, click the Calendar tab and under Show this calendar, select Outlook.

Some icons may not appear in week and month views due to limited space.

Our scenario:
You want to check your calendar to see if you have time available to meet with your co-worker before the meeting with Tom Dale.

To view the calendar

1. On the Navigation Bar, click **Calendar**.
2. Select the type of calendar to view.
    - Day View - Displays a timeline for the day. Lists all scheduled activities and events for that day.
    - Week View - Displays each day in the selected week. Lists scheduled activities and events for each day.
    - Month View - Displays month calendar, listing scheduled activities for each day.
    - Year View - Displays a 12-month calendar and a list of events and activities scheduled for selected dates. Bold numbers on the calendar indicate dates with scheduled activities.
3. To customize the types of activities you see in the calendar, right-click in the calendar, and on the shortcut menu, point to **Show**, and then select all of the activity types that you want to appear on the calendar.

4. To view the other user's calendar
    a. Click the User button (your name) in the top right corner.
    b. In the **Select Users to View** dialog box, click **Add**, select the other user you want to view, and then click **OK**.
    c. Click **OK**.
5. To print the calendar, on the **File** menu click **Print Calendar Reports**, select your options, and then click **Print**.

For more information see the "Using the Calendar" topic in the Sage SalesLogix Client Help.

Using the Activities View

Use the Activities view to manage your scheduled activities, events, literature requests, and confirmations. If you have additional access rights, you can also view other Sage SalesLogix users' activities.

The tabs that appear in the Activities view are:

All Open	To-Dos	Events
Calls	Personal	Literature
Meetings	Alarms	Confirmations

The following icons provide information about the activity:

Icon	Description
☎	Phone Call
🤝	Meeting
📋	To-Do
🏠	Personal Activity
📎	The activity has an attachment
🔄	The activity is a single occurrence of a recurring activity
⏰	The activity has an alarm

Our scenario:
You want to see how many phone calls you have tomorrow.

Open the Activity List view

To view phone calls scheduled for tomorrow

1. On the Navigation Bar, click **Activities**.
2. Click the **Calls** tab.
3. Click the drop-down arrow and select **Tomorrow** from the list.

Viewing a History of Interactions with an Account

When responding to scheduled or unscheduled activities, you may need to view the history of interactions with the contact and account or lead. For example, if a customer calls to ask a question she had from your last meeting, you can open the account history to view the meeting notes. The Notes/History tab contains all interactions, including full text notes, and provides filter options for viewing, e-mailing, and printing history items and notes.

Our scenario:
You want to review all the interactions you have had with anyone at Beeker Motor's.

To view account history

1. Go to Beeker Motors' Account Detail view.
2. Click the **Notes/History tab**. If the tab is not visible, click the **More Tabs** tab.
3. If necessary, click the **Filter Options** button and use the filters to narrow the list of history items.
4. Right-click the item with the history item to be viewed, and then click **View History**.
5. When you are finished viewing, click **Close**.

? For more information see the "Notes/History Tab" topic in the Sage SalesLogix Client Help.

Chapter 4

Communicating with Contacts and Leads

In addition to telephone calls and meetings, you may need to send additional information to your contacts or leads, such as proposals, letters, or memos. Through the Sage SalesLogix Write menu, you can create and edit templates, letters, and other business correspondence. You can then use Mail Merge to merge your template to contacts, leads, accounts, or opportunities.

Outlook Integration with Sage SalesLogix enables you to share information between Microsoft Outlook and Sage SalesLogix when you write e-mail messages, add contacts, and schedule meetings.

In this chapter, you will learn to:

- Set your e-mail system options
- Create a template
- Use Mail Merge to send information to contacts
- Work with Microsoft Outlook e-mail

Setting E-mail Options

Before you can use e-mail in Sage SalesLogix, you must first set your e-mail options. Use the E-mail tab in the Sage SalesLogix Options dialog box to set up your e-mail application options. Depending on the e-mail application you select, some options will not be available. Your administrator determines which options are available for you to set and can override any changes you make to the e-mail settings. If you notice that your settings have changed, contact your system administrator.

Use the following steps to set up your e-mail options to use Microsoft Outlook as your mail system.

To set e-mail system options for Microsoft Outlook

1. On the Sage SalesLogix Client **Tools** menu, click **Options**, or, right-click in any calendar view, and then click **Options**.
2. Click the **E-mail** tab.
3. In the **Mail System Options** area, in the **Mail System** box, select **Microsoft Exchange** or **Microsoft Outlook**.
   Microsoft Outlook users: If your company is using the Advanced Outlook Integration feature, you should select **Microsoft Outlook** as your e-mail system.
4. In **Profile Name** box, select from the list of available local profiles.
5. To connect to the e-mail application when you start the Sage SalesLogix Client, select **Automatically Logon to e-mail**.
6. If you connect through the Internet via POP3/SMTP or IMAP4/SMTP, select **Automatically dial using**, and then select from the list.
   - Network users: click **None**.
   - Remote users: click your dial-up networking connection name.

7. In the **Log to History** area, select one of the following options:
    - If you select **Prompt**, when you use the **Send** button in Outlook, no prompt appears, the e-mail is not recorded to History.
    - If you select **Prompt**, when you use the **Send SLX** button in Outlook, the Complete E-mail dialog box opens so you can edit the details of the history item and schedule a follow-up activity.
    - If you select **Do Not Prompt**, when you use the **Send** button in Outlook, no prompt appears, and the e-mail is not recorded to History.
    - If you select **Do Not Prompt**, when you use the **Send SLX** button in Outlook, no prompt appears, and the e-mail is recorded to History.
8. In the **Record E-Mail to History** area, select **Prompt for Duplicate Contacts** and/or **Prompt for Contact not Found**.
   These prompts are message boxes informing you of a problem when logging the e-mail message to a contact's History.
9. Click **OK**.

For more information see the "Setting E-mail Options" topic in the Sage SalesLogix Client Help:

Working with Templates

You can use templates to create letters, proposals, faxes, or e-mail messages that will be used for more than one contact or lead. Templates use standard text that does not change, as well as mail merge fields that use Sage SalesLogix information that changes depending upon the contact or lead being merged. Sage SalesLogix has two types of templates:

- **Public templates** are created and distributed by the system administrator and stored in the Public Templates folder. Public templates usually are released to all users. When you copy a public template and save it to your computer, it becomes a private template.
- **Private templates** are created by a user and are automatically stored in the Private templates folder. When you create a private template, only you have access to the template.

Templates are created using Microsoft Word, so you must have Microsoft Word installed on your local machine for template creation.

For more information see the "Managing and Selecting Templates" topic in the Sage SalesLogix Client Help.

Creating a New Template

These instructions help you create a new private Microsoft Word template.

Our scenario:
Tom Dale requested a pricing proposal for 150 motors. You need to create a new pricing proposal template.

To create a new template

1. On the **Write** menu, select **Templates**.
2. In the **Manage Templates** dialog box, click **New**.
3. In the **Properties for: New Word Template** dialog box, do the following:
   a. In the **Template Type** section, select **E-mail**.
   b. In the **Name** box, type **Pricing Proposal**.
   c. In the **Family** box, select **E-mail**.
   d. In the **Main Table** box, select **Contact**.
   e. In the **Owner** box, your name should appear as the owner.
   f. Click **OK**.
   Microsoft Word opens for you to create the new template.
4. In the empty document, type the text you want to include in the proposal template.
5. To add Sage SalesLogix merge fields to the template, place the cursor in the template where you want the merge field to appear, click **Insert SLX Field**, then from the merge field list, select a field.
   The new merge field appears in the template.
6. Click **Save and Close**.
   The Pricing Proposal appears in the Private Templates folder under the E-mail family.
7. In the **Manage Templates** dialog box, click **Close**.

Using Mail Merge

You can use Mail Merge when you need to correspond with a group of contacts, accounts, opportunities, or leads. Mail Merge helps you simplify the process of sending the same information to numerous people by merging information into a template. You can merge to a file, send an e-mail, send a fax, or print the merged document.

Our scenario:
You recently provided a demonstration for upgrading all of your contacts at Beeker Motors, and want to send a letter thanking them for their time. You want to run a mail merge to send the information to all contacts at once.

To send e-mail using Mail Merge

1. On the **Write** menu, click **Mail Merge**.
   The Mail Merge dialog box appears.
2. In the **Template** box, click the **Open** button, expand the **Public Templates** list, expand the **E-mail** list, and then double-click the **Thank you - Demo** template.

3. In the **Merge With** area, select **Specific**, select **Account**, and the click the **Find** button.
4. In the Lookup, type **Be**, click the **Find** button, and then double-click **Beeker Motors** in the list.
5. In the **Output To** area, select **E-mail**.
6. In the **From** box, your name appears.
7. (Optional) Click the Address Book in the **CC** and **BCC** boxes to select any other recipients.
8. In the **Format** box, the default format of your selected template is shown; select another format if desired.
9. Click the **History Options** tab.
10. Make sure the **Add History record for each Contact** option is selected.
11. In the **Category** box, click the ellipsis button, select **Demo**, and then click **OK**.
12. Click **Merge**.
    The merged e-mails are sent to all recipients and history records are added for both contacts.

For more information see the "Using Mail Merge" topic in the Sage SalesLogix Client Help.

Using Outlook Integration

If your company uses Outlook Integration, you can exchange e-mail messages, contacts, and calendar information between Microsoft Outlook and Sage SalesLogix. For example, you can:

- Compose an e-mail message in Outlook, select contacts from the SalesLogix Address Book, and then click Send SLX to record the e-mail body and any attachments to the associated record. You can also include attachments to the message.
- Select an e-mail message in Outlook, and then click Record to History to record the e-mail body and any attachments to the associated record.
- Send a Sage SalesLogix contact's information in a vCard file format via e-mail.
- Attach documents from Sage SalesLogix Library to a message in Outlook.
- Add Sage SalesLogix contacts to Outlook, add Outlook contacts to Sage SalesLogix, and synchronize changes made in Sage SalesLogix to Outlook.
- When working with a Sage SalesLogix contact in Outlook, you can click the Go to SLX button to open the contact's detail view in the Sage SalesLogix client.
- Click the E-mail button on the Ticket Detail view to copy ticket information into a new e-mail message.
- Use the Attendee Availability tab to schedule a meeting or phone call in Sage SalesLogix, which automatically places the request on your Sage SalesLogix and Outlook calendars.

For more information see the following topics in the Sage SalesLogix Client Help:

- "Sending an E-mail Message from a Ticket"
- "Understanding Calendar Integration"
- "Understanding Contact Integration"
- "Understanding E-mail Integration"

Our scenario:

You want to send an e-mail to Tom Dale and Joan Smith of Beeker Motors to tell them that you will be out of the office for a few days. You can use Microsoft Outlook and record the e-mail message in Sage SalesLogix.

To send an e-mail to multiple records using Outlook Integration

1. On the Navigation Bar, click **Contacts**.
2. Use the Lookup to find the contacts you want to e-mail.
   a. On the **Lookup** menu, point to **Contacts**, and then click **Company**.
   b. In the second box type **be**, and then click **Find**.
   c. Select **Create a temporary group containing all results**, and then click **OK**.
3. Click the **List/Detail** button to open to Contacts List view.
4. Select **Tom Dale** and **Joan Smith**.
   To select more than one record, hold down [Ctrl] or [Shift], and highlight the records.
5. Right-click and select **Write E-Mail to Selected Records**.
6. If the **Select Names** dialog box opens, select both names and click the **To** button, and then click **OK**.
7. If e-mail is enabled, but you have not logged on, at the message box, click **Yes** to log on.
8. In the **Subject** line, type **Out of Office**.
9. In the Body area, type **I will be out of the office for a few days. I'll contact you when I return.**
   Since you are using Outlook to send this e-mail message, you may want to record this to Sage SalesLogix History.
10. Click the **Send SLX** button.

Chapter 5

Managing Opportunities for Sales

Opportunities are potential sales to accounts and contacts. As an opportunity progresses, you can track the products involved in the opportunity, days in the pipeline, competitors, level of commitment by the prospect, and much more.

In this chapter, you will learn to:

- Add an opportunity
- Use Opportunity Statistics
- Close an opportunity

Adding a New Opportunity

Use the Insert Opportunity dialog box to enter opportunity information and to add, edit, or remove products, competitors, or contacts. You can also update the opportunity currency and rate if you have Multi-Currency enabled. You cannot add an opportunity to a personal account.

If you frequently use the same settings when adding opportunities, you can set default values. For more information see the "Setting Opportunity Defaults" topic in the Sage SalesLogix Client Help.

It is not necessary to complete all information when you add an opportunity. You can add the information that is most important to your company when you add the opportunity, and then update the Opportunity Detail view with more information later. For example, when you add an opportunity, you may want to note the probability of closing the sale, the dollar amount, and the estimated close date. Then add information as the opportunity moves through the pipeline.

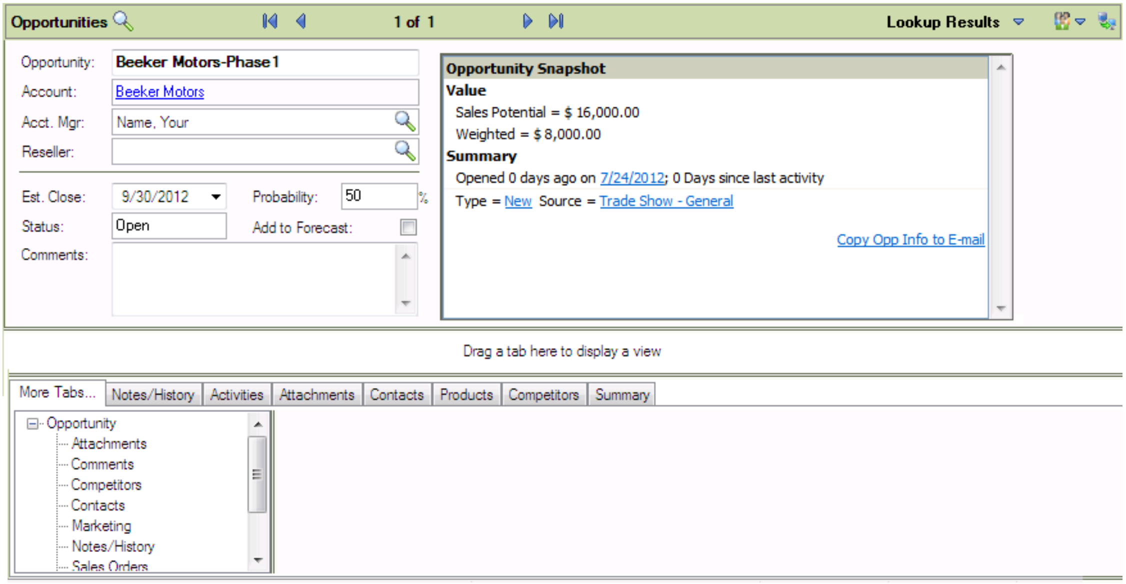
- If you do not want to add products while adding a new opportunity, you can add them later using the Products tab in the Opportunity Detail view.
- Adding contacts to an opportunity allows you to target the individuals at the account and designate their roles and influence in the possible sale. If you do not add contacts while adding the new opportunity, you can add them later using the Contacts tab in the Opportunity Detail view.

Our scenario:
There is an opportunity for a sale of 10 printers to Beeker Motors. You want to create a new opportunity and add products and contacts.

To add a new opportunity

1. Open the Beeker Motors' Account Detail view.
2. On the **Insert** menu, click **Opportunity**

3. Complete the following information:
   Based on your Opportunities options, some boxes may already be completed.
   - **Description** - Enter a name for the opportunity.
     To help track opportunities, use the account name in the opportunity description.
   - **Account** - Verify that **Beeker Motors** appears.
   - **Acct. Mgr.** - Click the **Find** button to find the person or team within your organization that manages the account.
   - **Est. Close** - Click the **Calendar** button, select the date that the opportunity is estimated to close, and then click **OK**.
   - **Status** - Your company defines the opportunity status list. Click the **ellipsis** button, and select a status from the list.
   - **Type** - Click the **ellipsis** button, and select **New**.
   - **Source** - Click the **Find** button, and select **Trade Show**.
   - **Close Prob.** - Click the **ellipsis** button, and then select the probability that this opportunity will be closed from the list.
4. Add the opportunity products.
   a. In the **Products** section, click the **Add** button.
   b. From the **Add Opportunity Product** dialog box, find and select **NetPrinter Laser Elite** in the **Available Products** list, click **Add**, and then click **OK**.
   c. In the grid, click the **Quantity** column and change **1** to **10**.
5. Add the opportunity contacts.
   a. In the **Contacts** section, click the **Add** button.
   b. From the **Select Contact(s)** dialog box, select **Joan Smith**, and then click **OK**.
6. Click **OK**.


Opportunities
1 of 1
Lookup Results
Drag a tab here to display a view
More Tabs...
Notes/History
Activities
Attachments
Contacts
Products
Competitors
Summary
Opportunity
Attachments
Comments
Competitors
Contacts
Marketing
Notes/History
Sales Orders

Opportunity: Beeker Motors-Phase1
Account: Beeker Motors
Acct. Mgr: Name, Your
Reseller:
Est. Close: 9/30/2012
Probability: 50 %
Status: Open
Add to Forecast: ☐
Comments:

Opportunity Snapshot
Value
Sales Potential = $ 16,000.00
Weighted = $ 8,000.00
Summary
Opened 0 days ago on 7/24/2012; 0 Days since last activity
Type = New Source = Trade Show - General
Copy Opp Info to E-mail

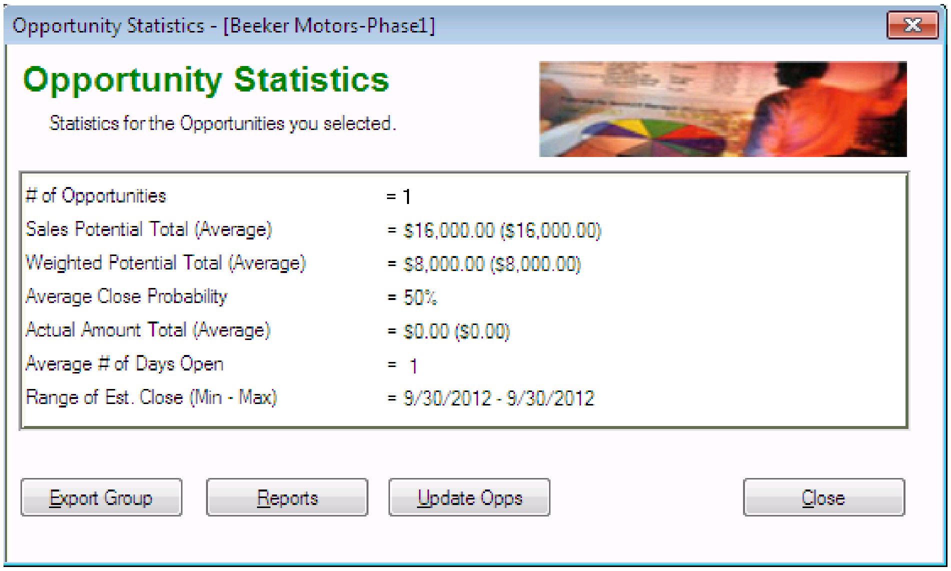
Figure 7 Opportunity Detail view for Beeker Motors

Using Opportunity Statistics

You can use Opportunity Statistics to view opportunity information at a glance. You can view opportunity statistics for a group of opportunities, or you can select individual opportunities from the Opportunity List view. You can also export opportunities to Excel or view opportunity reports.

To open Opportunity Statistics

1. On the Navigation Bar, click the **Opportunities** button.
2. In the Opportunities List view, open the group of opportunities you want to view. You can get statistics for the entire group or select multiple opportunities in the Opportunity List view.
3. Do one of the following:
    - On the **View** menu, click **Opportunity Statistics**.
    - Select the record(s) you want to view, right-click in the list view, and then click **Statistics for Selected Opportunities**.



Opportunity Statistics - [Beeker Motors-Phase1]

Opportunity Statistics

Statistics for the Opportunities you selected.

# of Opportunities = 1
Sales Potential Total (Average) = $16,000.00 ($16,000.00)
Weighted Potential Total (Average) = $8,000.00 ($8,000.00)
Average Close Probability = 50%
Actual Amount Total (Average) = $0.00 ($0.00)
Average # of Days Open = 1
Range of Est. Close (Min - Max) = 9/30/2012 - 9/30/2012

Figure 8 Opportunity Statistics view

4. When finished, click **Close**.

Closing an Opportunity

Closing an Opportunity

When an opportunity is won or lost, you should close the opportunity. For future reference and reporting purposes, you should provide the reason for closing the opportunity.

Our scenario:
Beeker Motors has agreed to your terms and pricing and now you may close the opportunity.

To close an opportunity

1. Open the Beeker Motor's opportunity in the Opportunity Detail view.
2. In the **Status** box, click the **ellipsis** button, select **Closed-Won** from the list, and then click **OK**.
   The Close Opportunity dialog box opens.
3. If necessary, modify the **Actual Close** date. To modify the date, click the **Calendar** button, select a new date, and then click **OK**.
4. In the **Reason Won** box, click the **ellipsis** button, select an item or items from the list, and then click **OK**.
5. In the **Comments** box, type **Delivery must be complete by the end of the financial quarter**.
6. Click **OK**.
   Beeker Motors' Opportunity Detail view appears with a Closed-Won Status and the Probability automatically updates to 100%.
7. The **Move Products to Assets** dialog box opens, click **OK** to move the printers from opportunity products to assets.

To assign a serial number to an asset

1. Click the **Beeker Motors** link.
2. Click the **Assets** tab. If the tab is not visible, click the **More Tabs** tab.
3. Double-click **NetPrinter Laser Elite**.
   The Edit Asset dialog box opens.
4. In the **Serial Number** box, type **BMNPLE001**.
5. Click **OK**.

Chapter 6

Managing Leads and Campaigns

This chapter is an introduction to Sage SalesLogix Marketing. With Sage SalesLogix Marketing you can develop and qualify new sales leads, convert leads in into customer in a structures process, and create and manage sales campaigns while tracking their effectiveness.

In this chapter, you will learn to:

- Add leads to Sage SalesLogix
- Import leads to Sage SalesLogix
- Qualify a lead
- Add a campaign
- Add targets to a campaign
- Add stages and tasks to a campaign
- Add products to a campaign
- Launch a campaign
- Track campaign responses

Working with Leads

Leads are unqualified potential customers. Use lead qualification criteria to determine if a lead has valid information, already exists as a lead or contact, or is ready to be converted to a sales opportunity. Once qualified, a lead can be converted to or merged with a contact and account. You can also create a new sales opportunity.

Adding a Lead

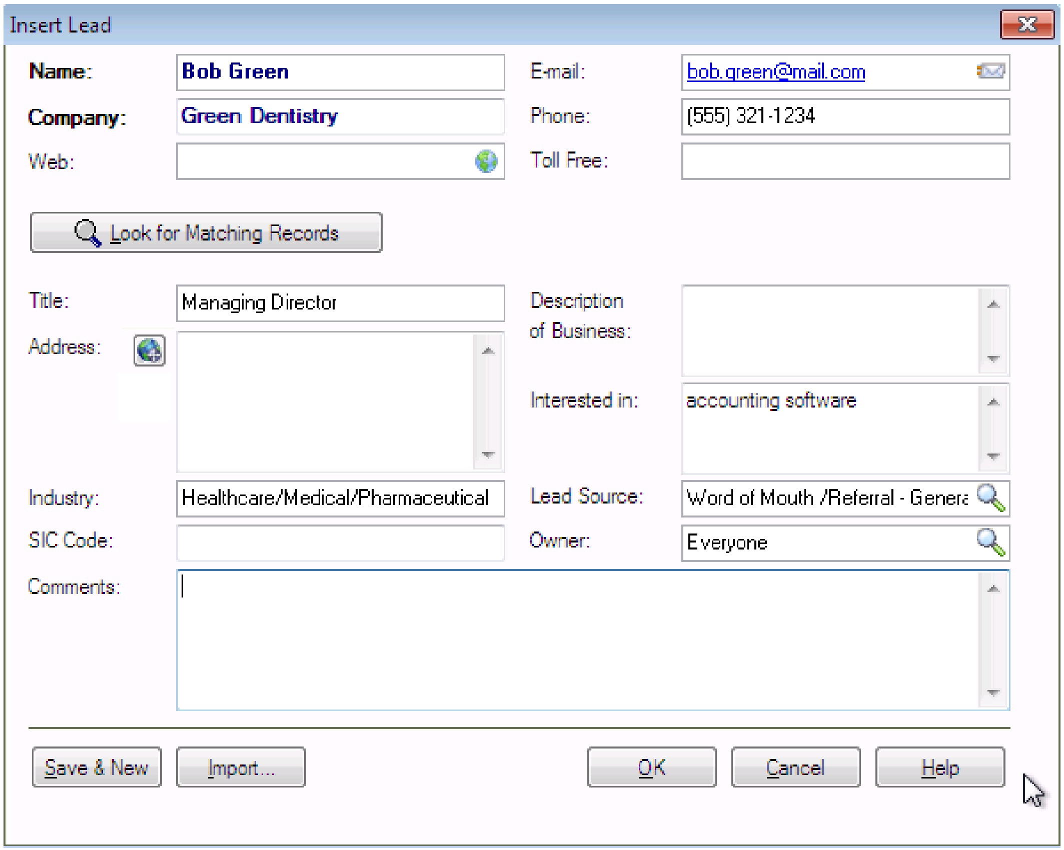
There are many ways in which your company can acquire leads. They may buy lead lists, acquire another company's customers, or find a single lead while maintaining current accounts. If you have multiple leads, importing the information to Sage SalesLogix is the most efficient method. However, if you cannot import lead information, you must manually add the lead(s) to Sage SalesLogix.

Our scenario:
While you were speaking to a current contact, he mentioned his friend Bob Green may be interested in purchasing some software. You need to add Bob Green to Sage SalesLogix as an unqualified lead.

To add

1. On the **Insert** menu, click **Lead**.
2. In the **Name** box, type **Bob Green**.
3. In the **Company** box, type **Green Dentistry**.
4. In the **E-mail** box, type **bob.green@greendentist.mail**.
5. In the **Phone** box, type **5553211234**.

6. Click **Look for Matching Records** to search the database for leads, contacts and accounts that have matching information.
   The Matching Leads dialog box appears. If a matching record displays in this dialog box, you can open the matching record to see if the lead, contact, or account is the same as the lead you are entering.
7. In the **Matching Leads** dialog box, click **Close**.
8. In the **Title** box, select or type **Managing Director**.
9. In the **Industry** box, click within the box, click the **ellipsis** button, select **Healthcare/Medical/Pharmaceutical**, and then click **OK**.
10. In the **Interested in** box, type **accounting software**.
11. In the **Lead Source** box, click the **Find** button.
12. In the **Lookup Lead Source** dialog box, click the **Find** button, select **Word of Mouth/Referral**, and then click **OK**.


Insert Lead
Web:
Toll Free:
Look for Matching Records
Address:
Description of Business:
SIC Code:
Comments:
Save & New
Import...
OK
Cancel
Help

Name: Bob Green
E-mail: bob.green@mail.com
Company: Green Dentistry
Phone: (555) 321-1234
Title: Managing Director
Interested in: accounting software
Industry: Healthcare/Medical/Pharmaceutical
Lead Source: Word of Mouth /Referral - Genera
Owner: Everyone

Figure 9 Insert Lead dialog box

13. In the **Insert Lead** dialog box, click **OK**.

Importing Leads

Your company may purchase mailing lists or have a large number of potential customers that must be tracked in Sage SalesLogix. Rather than adding leads one at a time, you can import large numbers of leads to Sage SalesLogix quickly and easily.

Use the Import Leads view to import lists of leads into Sage SalesLogix. You may only import leads from a comma-separated-values (CSV) list. Valid file types include Microsoft Excel, .txt files, and other database file types, but files must be saved as a CSV file.

Our scenario:
Your manager has given you a file containing 200 leads. You want to import the leads into Sage SalesLogix so that you can begin calling them.

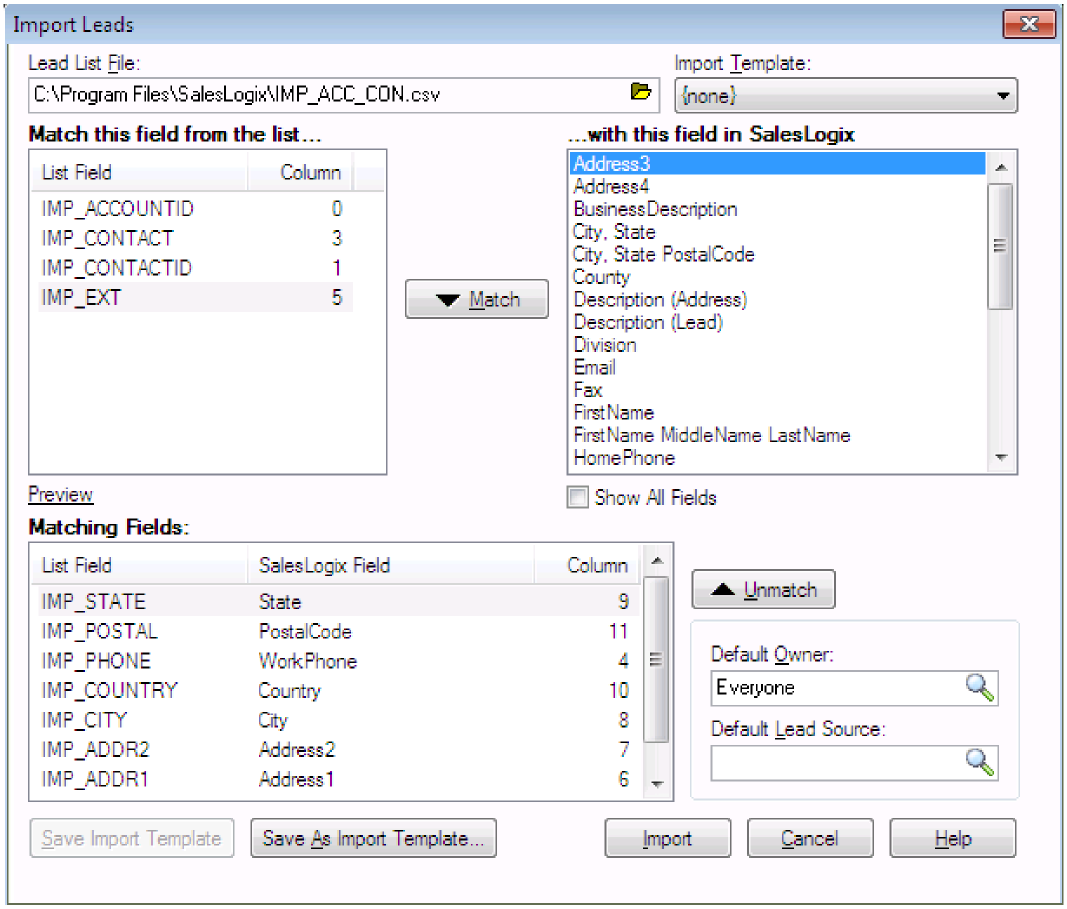
To import leads

1. From the **Insert** menu, click **Import Leads**.
2. Click the **Lead List File** Open button, browse to the list you want to import, and then click **Open**.
   The Import Leads Preview dialog box opens.
3. Preview the records before they are imported. If necessary, select a different delimiter value, for example a comma, semicolon, or text qualifier.

   For more information see the "Import Leads Preview" topic in the Sage SalesLogix Client Help.

4. Click **OK**.
   The wizard moves to Step 3, Map Fields.
5. Match the lead list fields and Sage SalesLogix lead fields. If you want to display all of the fields in both lists and any template, select **Show All Fields**.
   a. In the **Match this field from the list** box, select the external list field you want to match. If you need to preview the imported list, click **Preview**.
   b. In the **with this field in SalesLogix** box, select the Sage SalesLogix field that the list field should be matched with.
   c. Click **Match**.
   Matched fields display in the Matching Fields box.
6. Repeat the previous step for each field that needs to be matched.
7. Click the **Default Owner Find** button to select the person or team within your organization that will own the imported leads.

8. Click the **Default Lead Source Find** button to select how the imported leads were generated.



Lead List File: C:\Program Files\SalesLogix\IMP_ACC_CON.csv

Import Template: (none)

Match this field from the list...

List Field	Column
IMP_ACCOUNTID	0
IMP_CONTACT	3
IMP_CONTACTID	1
IMP_EXT	5

...with this field in SalesLogix

Address3
Address4
BusinessDescription
City, State
City, State PostalCode
County
Description (Address)
Description (Lead)
Division
Email
Fax
FirstName
FirstName MiddleName LastName
HomePhone

☐ Show All Fields

Matching Fields:

List Field	SalesLogix Field	Column
IMP_STATE	State	9
IMP_POSTAL	PostalCode	11
IMP_PHONE	WorkPhone	4
IMP_COUNTRY	Country	10
IMP_CITY	City	8
IMP_ADDR2	Address2	7
IMP_ADDR1	Address1	6

Default Owner: Everyone

Default Lead Source:

Figure 10 Import Leads dialog box

9. Click **Import**.

Qualifying a Lead

A lead may contain unqualified information. You can use lead qualification criteria to validate information and determine if the lead is a sales opportunity. Once qualified, you can convert a lead to a contact and account and create a new sales opportunity.

Our scenario:

You spoke to Bob Green on the phone and he has decided to order from your company. You need to add the information regarding Bob's purchase and convert him to a qualified lead.

If your Qualification criteria was customized by your administrator, the items you see in your workspace may be different.

To qualify a lead

1. Click the **Leads** button on the Navigation bar.
2. Click the **Leads** Quick Find button (magnifying glass).

3. In the **Find** dialog box, type **green**, click the **Find** button, and then double-click **Green, Bob** in the list.
4. In the **Qualification** box, click the drop-down arrow, and then click **Lead**.
5. Under **Qualification**:
   a. Select the **Valid Contact** check box.
   b. Select the **Budget for purchase** check box, and then in the corresponding text box type **5000**.
   c. Select the **Timeframe for purchase** check box, and then in the corresponding text box type **3 months**.
   d. Select the **Business need identified** check box, and then in the corresponding text box type **accounting software**.
   e. Select the **Decision maker identified** check box, and then in the corresponding text box type **Bob Green**.
6. Once the lead is qualified and ready to convert to a contact and account, click the **Convert Qualified Lead** button.
7. In the **Convert Lead** dialog box, verify that no existing contacts or accounts match the lead you are qualifying.
8. Click **Convert**.

Working with Campaigns

A campaign is a combination of various advertising, public relations, sales promotion, and selling activities used over a period of time to achieve predetermined sales or marketing goals. A campaign can target a specific industry or group. Sage SalesLogix Marketing allows you to track information such as the time frame of the campaign, products associated with the campaign, response rates for a campaign, and more.

Adding a Campaign

After you have determined what type of campaign your company plans to use, you can add the information to Sage SalesLogix.

Our scenario:
Your company has decided to run a return mail advertisement campaign to all leads and contacts in the state of Illinois. You need to add the campaign information to Sage SalesLogix. This includes the campaign targets, stages, and tasks that must be completed during the campaign.

To add a campaign

1. On the **Insert** menu, click **Campaign**.
   The Insert Campaign dialog box appears.
2. In the **Campaign Name** box, type **IL Return Mail Ad Q4 FY2012**.
3. In the **Description** box, type **Return mail advertisement for IL - Fall 2012**.
4. In the **Objective** box, type **Promote PC v7**.
   In this scenario, the objective of the campaign is to promote the new version of Pocket PC.
5. In the **Call to Action** box, type **Pre-register and save 10%**.

6. In the **Lead Source** box, click the **ellipsis** button, select **Advertising - General**, click **Add**, and then click **OK**.
7. In the **Products** box, click the **ellipsis** button, type **Po** in the filter box, click the **Find** button, select **Pocket PC**, click **Add**, and then click **OK**.
8. In the **Status** box, select **Setup**.
9. In the **Code** box, type **RMAdQ42012**.
   The code is a unique identifier for this campaign.
10. In the **Start Date** box, type or select next Monday's date.
11. In the **End Date** box, select a date 3 months in the future.
12. In the **Manager** box, click the **Find** button, select your name, and then click **OK**.
13. Click **OK**.
    You can add targets, stages, and tasks using the Insert Campaign dialog box. However, the steps in the following sections describe how to add these records after the campaign has been added to Sage SalesLogix.

Adding Targets to a Campaign

When you identify your targets, you isolate the contacts, accounts, and/or leads on which to focus your marketing efforts. Effectively targeting your audience allows you to make the most of your marketing campaign by spending time and money on a segment of the market most likely to purchase from your company.

To add targets to a campaign

1. On the Navigation Bar, click **Campaigns**.
2. Open the **IL Return Mail Ad Q1 FY2012** campaign in the Campaign Detail view.
3. Click the **Targets** tab.
4. Click the **Manage List** button.
5. Use the filters to narrow the list of records.
   a. Select **Accounts (all Contacts)**.
   b. Select the **State** check box, select **Starting with** in the drop-down box, and then type **IL** in the text box.
6. To find out how many targets meet the filter criteria before searching, click the **How Many?** button. After viewing the number of targets, click to **OK** to close.
7. Click the **Add Targets** button to add all the targets in the list and close the dialog box.
   The targets appear in the Targets tab grid.
8. Click **OK**.

When you leave and return to the Targets tab, you may need to click Refresh in order to see the list of targets.

Adding Campaign Stages and Tasks

To add a stage to a campaign

1. Open the **IL Return Mail Ad Q4 FY**2012 campaign in the Campaign Detail view.
2. Click the **Stages/Tasks** tab.

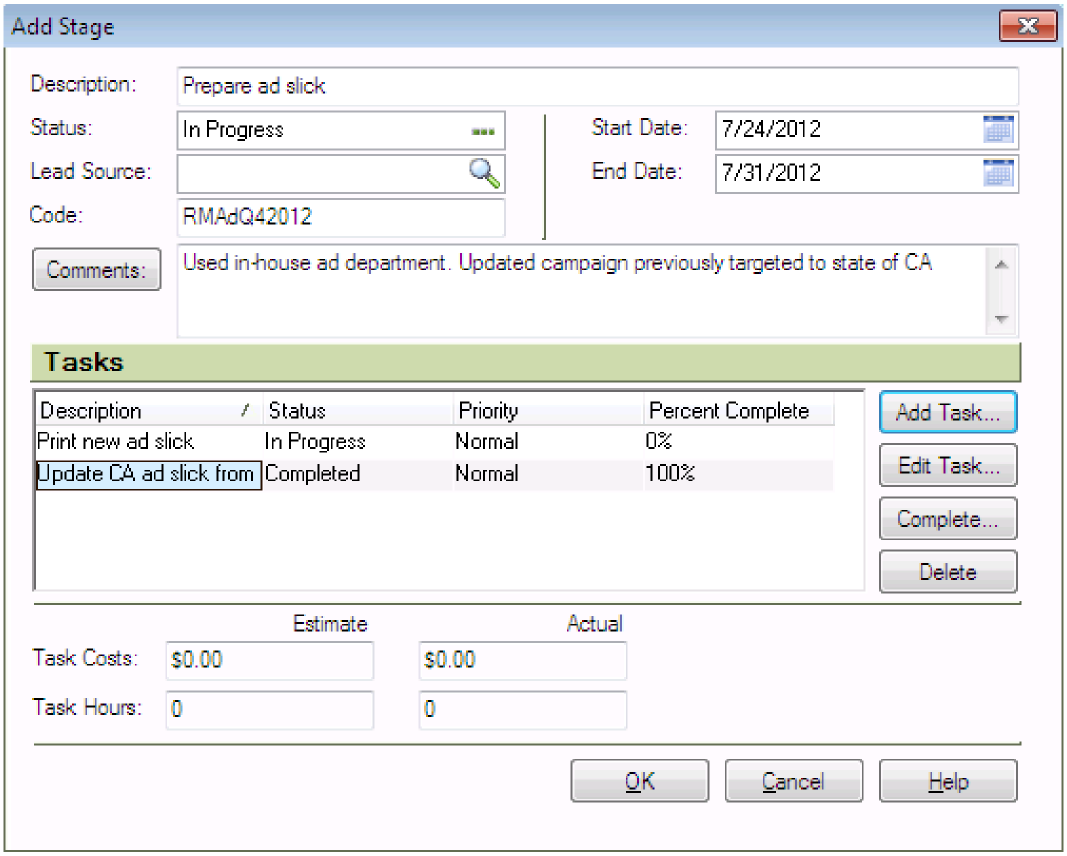
3. Right-click within the **Stages/Tasks** tab, and then click **Add Stage**.
   The Add Stage dialog box appears.
4. In the **Description** box, type **Prepare ad slick**.
5. In the **Status** box, click the **ellipsis** button, and select **In Progress**.
6. In the **Comments** box, type **Used in-house ad department. Updated campaign previously targeted to state of CA.**
7. In the **Start Date** box, select today’s date.
8. In the **End Date** box, select a date one week from today.

Campaign tasks can help Sage SalesLogix Marketing users manage their campaigns. You can add and edit task information, or complete a task once it is finished.

To add tasks to a campaign

1. In the **Add Stage** dialog box, click **Add Task**.
2. In the **Description** box, type **Update CA ad slick from FY2011 Q4 campaign**.
3. In the **Status** box, click the **ellipsis** button and select **Completed**.
4. In the **% Complete** box, type **100**.
5. In the **Needed Date** box, select yesterday's date.
6. In the **Assign to** section, select **Other Individual**.
7. In the **Assign To** box, type **Advertising Dept - Tom**.
8. Click **OK**.
9. In the **Add Stage** dialog box, click **Add Task**.
10. In the **Description** box, type **Print new ad slick**.
11. In the **Status** box, click the **ellipsis** button, and then select **In Progress**.
12. In the **Needed Date**, select a date 6 days from today.
13. In the **Assign to** section, select **Other Individual**.
14. In the **Assign To** box, type **Print Vendor**.

15. Click **OK**.



Description: Prepare ad slick
Status: In Progress
Lead Source:
Code: RMAdQ42012
Start Date: 7/24/2012
End Date: 7/31/2012
Comments: Used in-house ad department. Updated campaign previously targeted to state of CA

Description	Status	Priority	Percent Complete
Print new ad slick	In Progress	Normal	0%
Update CA ad slick from	Completed	Normal	100%

	Estimate	Actual
Task Costs:	$0.00	$0.00
Task Hours:	0	0

Figure 11 Add Stage dialog box with tasks added

16. Click **OK**.

Adding Products to a Campaign

Products are the goods and/or services that you are selling in a campaign. You can add products to a campaign when you add the campaign information to Sage SalesLogix, or you can add or change product information for an existing campaign.

Our scenario:
Management wants to add an additional incentive for the campaign. You need to add additional products to the direct mail campaign.

To add products to an existing campaign

1. Open the **IL Return Mail Ad Q1 FY2012** campaign in the Campaign Detail view.
2. In the **Products** box, click the **ellipsis** button.
3. In the **Add Campaign Product** dialog box, click the **Find** button.
4. In the **Available Products** list, select **GoStore 200GB** and **Kiva Big Mouth Briefcase**, click **Add**, and then click **OK**.

Launching a Campaign

When all campaign information has been added to Sage SalesLogix, you are ready to launch the campaign. Launching the campaign allows Sage SalesLogix to begin tracking information used in reports, budgets, and so on.

When a campaign is launched, the campaign target contacts and leads are assigned to the first stage of a campaign and their status is changed to "Launched".

Our scenario:
After verifying all the campaign steps and information, you want to launch the campaign.

To launch a campaign

1. Open the **IL Return Mail Ad Q1 FY2012** campaign in the Campaign Detail view.
2. Verify all the information is correct.
3. Click **Launch**.
4. Review the **Launch Summary** report.
5. Click **Close** when finished.

Tracking Campaign Responses

After you launch a campaign, you can begin to track the responses associated with the campaign. Campaign responses include who responded, the date, the response method, any notes, and so on. You can track responses during various stages of the campaign. Adding this information correctly helps your company to identify successful campaigns and stages to aid in refining and running successful campaigns in the future.

Campaign responses can be added and viewed in the Sage SalesLogix Client Client.

Our scenario:
You need to add a response for a recent campaign. The individual has decided to purchase from your company.

To add and view campaign responses

1. Open the **IL Return Mail Ad Q1 FY2012** campaign in the Campaign Detail view.
2. Click the **Responses** tab.
3. Right-click within the **Responses** tab, and then click **Add Response**.
4. Select **Contact**, click the **Contact Find** button, type **st**, click the **Find** button, select the first name in the list, and then click **OK**.
5. Click the **Response Methodellipsis** button and select **Phone**.
6. In the **Comments** box, type **Responded within 5 days. Qualifies for 10% discount and free carrying case**.
7. Click **OK**.

Chapter 7

Working with Customer Service and Support

This chapter introduces you to the Sage SalesLogix Customer Service and Support features. The Customer Service and Support features allow designated users to track, qualify, and resolve customer questions and issues.

In this chapter, you will learn how to:

- Understand and work with contracts
- Add, work in, and close tickets
- Add and close a return
- Add and close a defect

Working with Contracts

Contracts are agreements between accounts and your company to provide support for products sold. Sage SalesLogix has five general types of contracts that cover support services. In addition, a contract can cover a specific set of products, or it can be a “blanket” contract that covers all products the account owns. You can use contracts to verify that support should be provided to specific accounts for specific products.

Understanding Contract Types

The five default contract types are:

Type	Description
Days	The contract is tracked according to a number of days of services the account has purchased. This value is entered into the Quantity box for the contract. When the contract type is Days, and as activities are generated for the account, the value in the Remaining box will not decrement.
Hours	The contract is tracked according to a number of hours of services the account has purchased. This value is entered in the Quantity box for the contract. The total time is calculated using the Elapsed Hours value for all activities generated for the account. As activities are generated, the value in the Remaining box decreases to reflect the number of hours left on the contract
Incidents	The contract is tracked according to the number of service calls the account has purchased. This value is entered into the Quantity box for the contract. The total number of incidents reflects the total number of tickets the account has opened. As tickets are opened, the value in the Remaining box decreases to reflect the number of incidents left on the contract.

Type	Description
Value	The contract is tracked according to a currency value placed on the services the account has purchased. This value is entered into the List Price or Contract Amount box for the contract. When a ticket activity is created against the contract, the activity's Total value is charged against the contract amount, and the value in the Remaining box decreases to reflect the value left on the contract.
Perpetual	The contract has no limit. The account can open an unlimited number of tickets and activities for an unlimited amount of time.

To ensure that the time, number of incidents, or currency value left on a contract is tracked accurately, you must activate the contract before beginning work on a ticket.

Adding a Contract

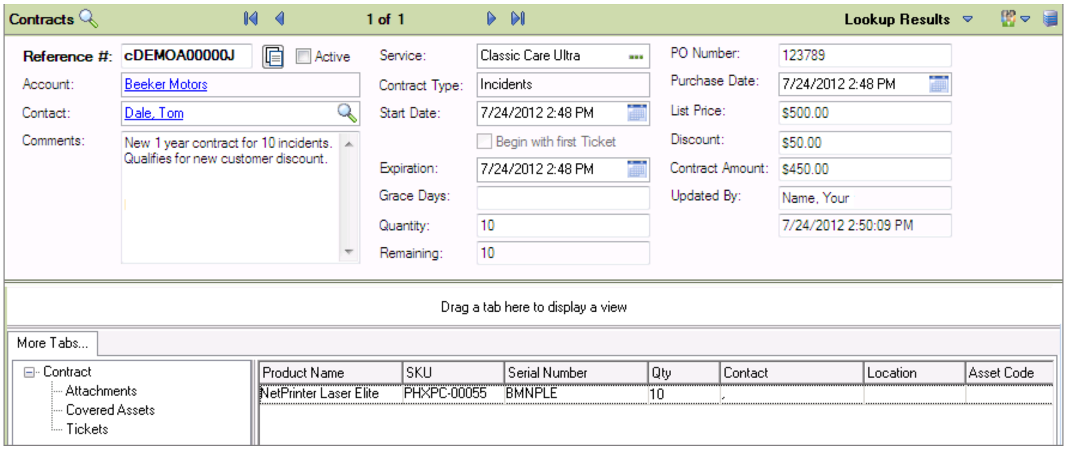
Each contract you add must be connected with an account that already exists in Sage SalesLogix. The following scenario explains how to create a contract for an account.

Our scenario:
Tom Dale calls to request a new contract. He wants a one year contract that covers up to 10 incidents.

To add a contract

1. Open the **Beeker Motors** Account Detail view and select the **Contracts** tab. If the tab is not visible, click the **More Tabs** tab
2. Right-click in the grid and then click **Insert New Contract**.
3. Complete the contract information boxes.
    a. Select **Active**.
    b. Verify that **Dale, Tom** is listed in the **Contact** box. If not, click the **Find** button and select **Tom Dale** from the lookup.
    c. In the **Comments** box, type **New 1 year contract for 10 incidents. Qualifies for new customer discount.**
    d. Click the **Service ellipsis** button and select **Classic Care Ultra** from the list.
    e. Click the **Contract Type ellipsis** button and select **Incidents** from the list.
    f. Leave the **Start Date** as today's date.
    g. Click the **Expiration Calendar** button and select the date one year from today.
    h. In the **Quantity** box, type **10**. This specifies that the contract covers 10 incidents in the next year.
    i. Type a purchase order number in the **PO Number** box.
    j. In the **List Price**, type **500.00**.
    k. In the **Discount** box, type **50.00** because he qualifies for a new customer discount.
    The Contract Amount is automatically calculated.

4. Click **OK**.



Reference #: cDEMOA00000J ☐ Active
Account: Beeker Motors
Contact: Dale, Tom
Comments: New 1 year contract for 10 incidents. Qualifies for new customer discount.
Service: Classic Care Ultra
Contract Type: Incidents
Start Date: 7/24/2012 2:48 PM
☐ Begin with first Ticket
Expiration: 7/24/2012 2:48 PM
Grace Days:
Quantity: 10
Remaining: 10
PO Number: 123789
Purchase Date: 7/24/2012 2:48 PM
List Price: $500.00
Discount: $50.00
Contract Amount: $450.00
Updated By: Name, Your
7/24/2012 2:50:09 PM

Product Name	SKU	Serial Number	Qty	Contact	Location	Asset Code
NetPrinter Laser Elite	PHXPC-00055	BMNPLE	10	,		

Figure 12 Contract Detail view

5. Associate Beeker Motors assets to the contract.
   a. On the Contract detail view, click the **Covered Assets** tab. If the tab is not visible, click the **More Tabs** tab.
   b. Right-click in the grid and click **Associate Asset**.
   c. In the lookup, in the box type **BMNP**, click the **Find** button, select **BMNPLE001**, and then click **OK**.

Working with Tickets

Tickets are records of customer inquiries or complaints. They can contain the information necessary to report, investigate, and close an inquiry or problem. Before you add a ticket, the account and contact must exist in Sage SalesLogix.

Adding a Ticket

Our scenario:

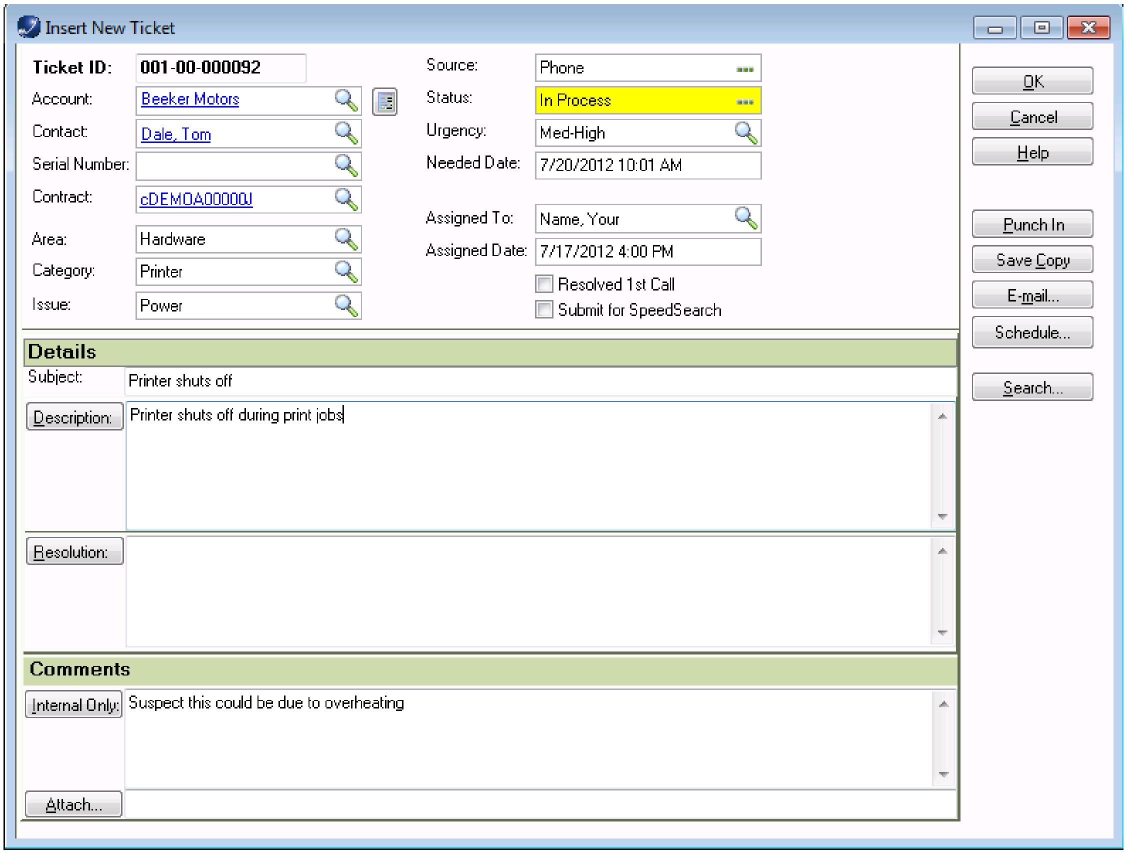
Tom Dale at Beeker Motors called. He is having a problem with one of their printers and needs the problem resolved by the end of the week. You need to create a ticket to work on the problem.

To add a ticket

1. Open Tom Dale’s Contact Detail view.
2. On the **Insert** menu, click **Ticket**.
3. In the **Insert Ticket** view, verify **Beeker Motors** appears in the **Account** box.
4. If the **Insert New Ticket - Account Service Information** dialog box is displayed, then select the contact for the ticket from the list of available contacts. In this case, select **Tom Dale**.
5. If necessary, in the **Contact** box, click the **Find** button, and then select **Tom Dale**.
6. In the **Contract** box, click the **Find** button, use the **Lookup Contract** to select the contract you created in the previous scenario, and then click **OK**.
7. In the **Area** box, click the **Find** button and in the **Area** list select **Hardware**.

Options available for Hardware appear in the Category list.

8. In the **Category** list, select **Printer**.
9. In the **Issue** list, select **Power**, and then click **OK**.
10. In the **Source** box, click the **ellipsis** button, select **Phone**, and then click **OK**.
11. In the **Status** box, click the **ellipsis** button, and then select **In Process**.
12. Click the **Urgency Find** button, click the **Find** button, select **Med-High**, and then click **OK**.
13. In the **Needed Date** box, use the **Calendar** button to select a date at the end of the week.
14. Verify the **Assigned To** box lists your name. If necessary, click the **Find** button and select your name from the list.
15. In the **Subject** box, type a short summary of the problem.
16. In the **Description** box, press **Shift**+**F9**, and then type detailed information for the problem.
17. Under **Comments**, in the **Internal Only** box, press **Shift**+**F9**, and then type additional information that is important to the ticket.



Ticket ID: 001-00-000092
Account: Beeker Motors
Contact: Dale, Tom
Serial Number:
Contract: cDEMOA00000J
Area: Hardware
Category: Printer
Issue: Power
Source: Phone
Status: In Process
Urgency: Med-High
Needed Date: 7/20/2012 10:01 AM
Assigned To: Name, Your
Assigned Date: 7/17/2012 4:00 PM
☐ Resolved 1st Call
☐ Submit for SpeedSearch

Details
Subject: Printer shuts off
Description: Printer shuts off during print jobs
Resolution:

Comments
Internal Only: Suspect this could be due to overheating

Figure 13 Insert New Ticket dialog box

18. Click **OK**.

Adding Ticket Activities

Ticket Activities are added through the Ticket Activities tab on the Ticket Detail view. Ticket Activities enable you to track the time, the types of tasks, and any associated costs involved in resolving a ticket. Activities are recorded by activity type and charge rate and are used for billing the customer against their service contracts. You can add your own ticket activities at any time from the Ticket Activities tab.

Our scenario:
You told Tom Dale that you will research his problem and call him back. You need to add a ticket activity for the research time.

To add a ticket activity

1. Open Tom Dale's ticket.
2. Click the **Ticket Activities** tab. If the tab is not visible, click the **More Tabs** tab.
3. Right-click in the tab area, and then click **Insert New Activity**.
   The Insert New Ticket Activity dialog box opens.
4. In the **Type** box, click the **ellipsis** button, and then select **Research**.
5. In the **Public Access** box, click the **ellipsis** button and select **1-Customer**.
   This setting determines whether customers will be able to see the ticket activity using Customer Portal.
6. Verify that the **User** box displays your name. If not, click the **Find** button to locate your name or the name of the individual who will be responsible for completing the activity.
7. Verify that the **Start Date** box displays the correct start date and time for the activity. If not, click the **Calendar** button to specify the correct date and time.
8. Since you have not yet completed the activity, skip the **End Date** box. When you complete the activity, you will use the **Calendar** button to select the date and time you finished working on the activity.
   It is very important that you select accurate dates and times in both the Start Date and End Date boxes because this information is used to calculate the Time Units, Elapsed Hours, Rate, and Total Labor.
9. (If necessary) In the **Charge Type** box, click the **Find** button, select **No charge**,and then click **OK**.
   The charge type is the rate your company charges against the customer’s support contract for the work you performed.
10. In the **Comments** box, type **Research printer power issues.**
11. Click **OK**...

For more information see the "Adding and Editing Ticket Activities" topic in the Sage SalesLogix Client Help.

Punching In and Out of a Ticket

The Punch In and Punch Out function enables you to track the time spent assisting a customer for each ticket. When you click the Punch In button on a ticket's detail view, Sage SalesLogix begins timing the activity. When you are finished, you can click Punch Out. Sage SalesLogix stops timing the activity and adds an activity record to the Ticket Activities tab for the ticket.

When you use the Punch In/Punch Out feature in a ticket, a timed activity is automatically created.

Our scenario:

Tom Dale calls with more information on his printer problem. You need to open the ticket and track the time you spend talking to him and gathering information.

To punch in to and out of a ticket

1. From the **Beeker Motors** Account Detail view, click the **Tickets** tab, and double-click the ticket.
2. Click the **Punch In** button.
   The button text changes to Punch Out, and Sage SalesLogix begins recording time against the ticket activity.
3. Click the **Ticket Activities** tab. If the tab is not visible, click the **More Tabs** tab
4. Right-click on the **Timed** activity to edit and then click **Open Activity**.
5. Enter the information from your conversation with Tom Dale in the **Comments**.
6. Click **OK**.
7. When you are finished working on the ticket, click **Punch Out** to stop tracking time on the ticket.

Closing a Ticket

The stage at which a ticket is closed and the person responsible for closing a ticket depend on your company's processes.

Our scenario:

You resolved the problem with Tom Dale's printer and completed all follow-up activities. Now you want to close the ticket.

To close a ticket

1. Open Tom Dale's ticket.
2. Ensure all ticket information is complete and accurate.
3. In the **Status** box, click the **ellipsis** button, and then select **Closed**.
4. If you are prompted to complete open activities for the ticket, do one of the following actions:
   - Click **Yes** to automatically complete any open activities which belong to you and do not have an End Date.
   - Click **No** close the ticket, leaving the ticket activity without an End Date.

5. Click the **Details** tab and update the **Resolution**.
    a. Press **Shift**+**F9**.
    b. Type **Printer overheats and turns off due to faulty fan**.
6. If you want to submit the resolution information to be accepted into the SpeedSearch indexes, select the **Submit for SpeedSearch** check box in the top pane.
7. Click **Save**.

Working with Returns

Returns are agreements to accept returned products from a customer for service, replacement, refund, or credit. This may also be referred to as an RMA or Return Materials Authorization.

Adding a Return

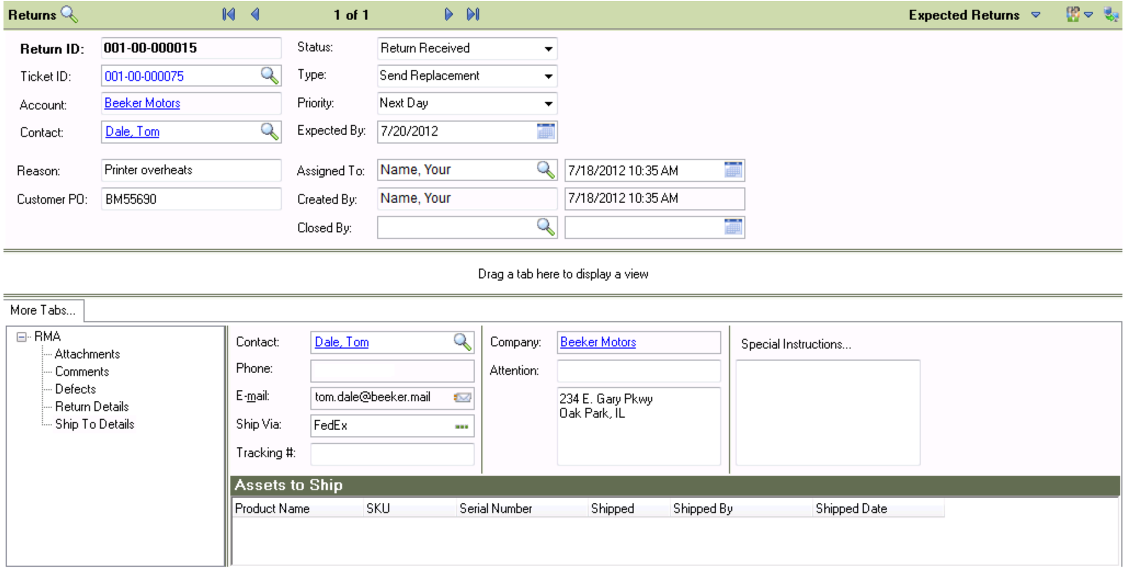
Every return must be associated to a ticket. Before you add a return, ensure that the related ticket exists. If necessary, create the ticket before proceeding.

Our scenario:
Tom Dale reported a problem with a printer and sent it in for repairs. After researching the ticket, you determined that the printer must be replaced.

To add a return

1. Open Tom Dale's ticket.
2. Click the **Returns** tab. If the tab is not visible, click the **More Tabs** tab.
3. Right-click and click **Insert New Return**.
4. Verify that the **Ticket ID**, **Account**, and **Contact** are correct.
5. In the **Reason** box, type **Printer overheats**.
6. In the **Customer PO** box, type the customer purchase order.
7. Click the **Status** drop-down arrow and select **Return Received**.
8. Click the **Type** drop-down arrow and select **Send Replacement**.
9. Click the **Priority** drop-down arrow and select **Next Day**.
10. In the **Expected By** box, click the **Calendar** button, and select this Friday. Click **OK**.

11. Click **OK**.
    The Return Detail view opens.



Return ID: 001-00-000015
Ticket ID: 001-00-000075
Account: Beeker Motors
Contact: Dale, Tom
Reason: Printer overheats
Customer PO: BM55690
Status: Return Received
Type: Send Replacement
Priority: Next Day
Expected By: 7/20/2012
Assigned To: Name, Your 7/18/2012 10:35 AM
Created By: Name, Your 7/18/2012 10:35 AM
Closed By:

Contact: Dale, Tom
Phone:
E-mail: tom.dale@beeker.mail
Ship Via: FedEx
Tracking #:
Company: Beeker Motors
Attention:
234 E. Gary Pkwy
Oak Park, IL
Special Instructions...

Product Name	SKU	Serial Number	Shipped	Shipped By	Shipped Date

Figure 14 Return Detail view

12. Click the **Ship To Details** tab. If the tab is not visible, click the **More Tabs** tab.
13. Verify the contact and address information is for Tom Dale at Beeker Motors.

Adding Products and Shipping Details to a Return

You add products to a Return to indicate which product the account is returning, and which is the replacement product to be shipped to the customer.

Our scenario:

You added the return for Tom Dale's ticket and now want to add the product asset that Tom is returning.

To add an asset to a return

1. Open the detail view for the return you created for Tom Dale's printer.
2. Click the **Return Details** tab. If the tab is not visible, click the **More Tabs** tab.
3. Right-click in the **Assets to Return** grid, and click **Associate Asset**.
4. Locate and select the **NetPrinter Laser Elite printer** using the lookup. In the box type **BMNP**, click the **Find** button, and select **BMNPLE0001**.
5. Click **OK**.

To update the shipping contact information

1. Click the **Ship To Details** tab. If the tab is not visible, click the **More Tabs** tab.
2. Verify that **Tom Dale** is the **Contact**.
3. Use the **Ship Via** and **Tracking #** boxes to include additional shipping information.
4. In the **Attention** box, type **Tom Dale**.

5. Verify that the address information is correct.
6. Type any special shipping instruction in the **Special Instructions** box.
7. Click **Save**.

To add the products to be returned and replaced

1. Right-click in the **Assets to Ship** grid, and then click **Add**.
2. In the **Insert New Shipped Product** dialog box, under **Returned Product**, click the **Product SKU Find** button, select **NetPrinter Laser Elite** printer, and then click **OK**.
3. Select **Return Existing**.
   The returned product is automatically added.
4. Click the **Shipped DateCalendar** button and select today's date.
5. Click **OK**.

For more information see the "Using the Return Ship To Details Tab" topic in the Sage SalesLogix Client Help.

Closing a Return

The stage at which a return is closed and the person responsible for closing the return depend on the process within your company. As an example, when the product has been returned by the customer and the replacement product has been shipped, that might be the stage at which you would close a return.

Our scenario:
Now that Tom Dale's replacement printer has been shipped to him, you want to close the return.

To close a return

1. Open the detail view for the return you created for Tom Dale's printer.
2. In the **Status** box, click the drop-down arrow, and then select **Closed** from the list.
3. Click **Save**.

Working with Defects

A defect is a record describing a problem in a product or process. It is similar to a ticket, but people involved in the design or construction of the product typically resolve defects. The system tracks defects so that problems with a product or process can be resolved in a timely manner, and company management is aware of issues with these products or processes.

Adding a Defect to an Existing Ticket

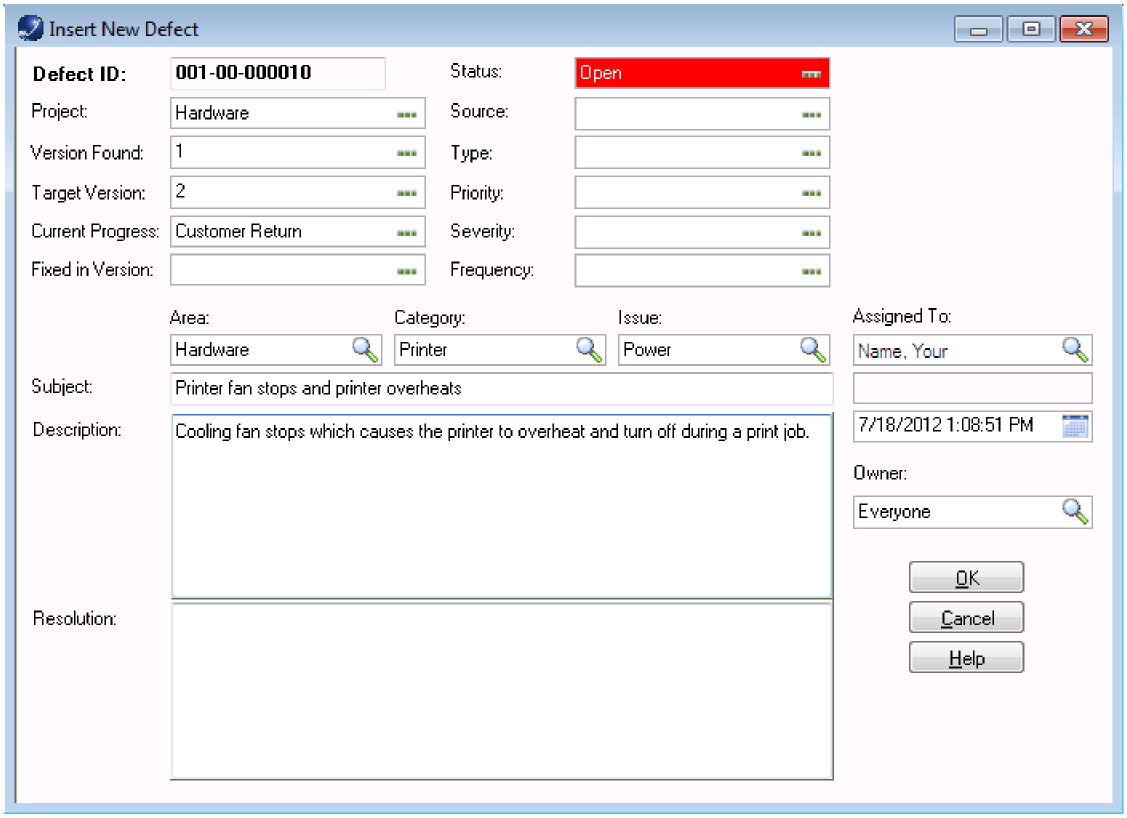
When you discover a problem in a product or process, you can add a defect to Sage SalesLogix.

Our scenario:
After receiving Tom Dale’s printer you discovered that there is a defect with the cooling fan. You need to enter a defect to track the problem.

To add a defect to an existing ticket

1. Open Tom Dale's ticket.
2. Click the **Defects** tab. If the tab is not visible, click the **More Tabs** tab.
3. Right-click in the gird, and click **Insert New Defect**.
4. Click the **Project ellipsis** button and select **Hardware**. Click **OK**.
5. In the **Version Found** box, click the **ellipsis** button,and select **1**.
6. In the **Target Version**, click the **ellipsis** button, and select **2**.
7. In the **Current Progress** box, click the **ellipsis** button, and select **Customer Return**.
8. In the **Area** box, click the **Find** button and in the **Area** list select **Hardware**.
9. In the **Category** list, select **Printer**.
10. In the **Issue** list, select **Power**, and then click **OK**.
11. Leave the **Status** as **Open**.
12. In the **Source** box, click the **ellipsis** button, and select **Parts**.
13. In the **Type** box, click the **ellipsis** button, and select **Power**.
14. In the **Priority** and **Severity** boxes, click the **ellipsis** button, select the importance and impact of the issue.
15. In the **Frequency** box, click the **ellipsis** button,and select **Weekly**.
16. Click the **Assigned To Find** button , select your name from the list, and then click **OK**.
17. In the **Subject** type **Printer fan stops and printer overheats**.

18. In the **Description** box, press **Shift+F9**, and then type **Cooling fan stops which causes the printer to overheat and turn off during a print job**.



Defect ID: 001-00-000010
Status: Open
Project: Hardware
Source:
Version Found: 1
Type:
Target Version: 2
Priority:
Current Progress: Customer Return
Severity:
Fixed in Version:
Frequency:
Area: Hardware
Category: Printer
Issue: Power
Assigned To: Name, Your
Subject: Printer fan stops and printer overheats
7/18/2012 1:08:51 PM
Description: Cooling fan stops which causes the printer to overheat and turn off during a print job.
Owner: Everyone
Resolution:

Figure 15 Insert Defect dialog box

19. Click **OK**.

To associate a product to a defect

1. In the Defect Detail view, click the **Products** tab. If the tab is not visible, click the **More Tabs** tab.
2. Right-click in the grid and click **Associate**.
3. Use the lookup to find **NetPrinter Laser Elite**.
4. Click **OK**.

Closing a Defect

The stage at which a defect is closed and the person responsible for closing the defect depend on the process within your company.

Our scenario:
The problem with the NetPrinter Laser Elite fan has been identified. You are ready to add a resolution and close the defect.

To close

1. Open the defect you created for the **NetPrinter Laser Elite**.
2. In the **Fixed in Version** box, click the **ellipsis** button and select an item from the list.

3. In the **Status** box, click the **ellipsis** button, and then select **Closed**. Click **OK**.
4. In the **Resolution** box, press **Shift**+**F9**, and then type **Fan is too small. Any printers experiencing this problem should be returned and the fan will be replaced.**
5. Click **Save**.

Chapter 8

Using Reporting and Analysis Tools

Sage SalesLogix includes reporting and analysis tools that help you identify opportunities and evaluate sales effectiveness.

The Reports view provides access to a set of pre-defined database queries that produce commonly used business reports. The specific reports available are determined by your system administrator, and are typically customized to the needs of your business.

The Sage SalesLogix Dashboard is a tool set that allows you to display and interact with a variety of performance and analysis information in a dashboard format. You can use the data provided to gain insight into organizational and individual performance, discover root causes for performance issues, and then take the corrective actions or make strategic decisions.

In this chapter, you will learn to:

- Run a report
- Create and save a report filter
- Understand the Sales Dashboard
- Adjust Content Set data
- Access Analysis Views and set filters

Using the Reports View

Reports enable you to view information about contacts, accounts, opportunities, tickets, and other related data.

The Reports view allows you to select from a list of available reports and apply filters to narrow the results. You can only access reports that have been released to you by the system administrator. Reports can be released to you personally, or to a team that you are a member of. When you view or print any report, only records you have access to are included in the report.

Our scenario:
You want to run a report listing all the interactions you have had with your contacts.

To run a report

1. On the Navigation Bar, click **Reports**.
2. In the **Select the type of report** list, select **Contact**.
3. In the **Select the name of the report** list, select **Contact Summary - Sample**.
4. Next to **Show Records that match**, click **Edit**.
5. In the **Conditions Match** box, select **All**.
6. IIn the **Match By** list select **Group**, and then in the **Group Name** list, select **My Contacts**.
7. Click the plus sign to add the condition.
8. In the **Send the report output to** box, select **Preview**.
9. Click **Generate Report**.

10. In the **Enter Values** dialog box, choose whether you would like to include notes and whether you would like each contact to display on a separate page.
11. Click **OK**.
12. In the report preview you can:
    - Use the tree view in the left pane to view specific pages in the report.
    - Use the arrow buttons to move to the next, previous, first, and last pages.
    - Print the report.
    - Export the report to a variety of supported file formats.

For more information see the "Filtering Data in Reports" topic in the Sage SalesLogix Client Help.

Working with the Sales Dashboard

The Sales Dashboard allows you to display and interact with a variety of performance and analysis tools in a dashboard format. You can use the data in the dashboard to gain insight into organizational and individual performance—and to discover root causes for performance issues—allowing you to make strategic decisions or to take corrective actions. From the Sales Dashboard, you can interact directly with other functions in Sage SalesLogix, such as completing activities and displaying opportunity views.

Understanding Dashboard Features

The Sales Dashboard is divided into three sections: an activities area, a standard Sage SalesLogix middle pane (a user-defined area), and a tab area.

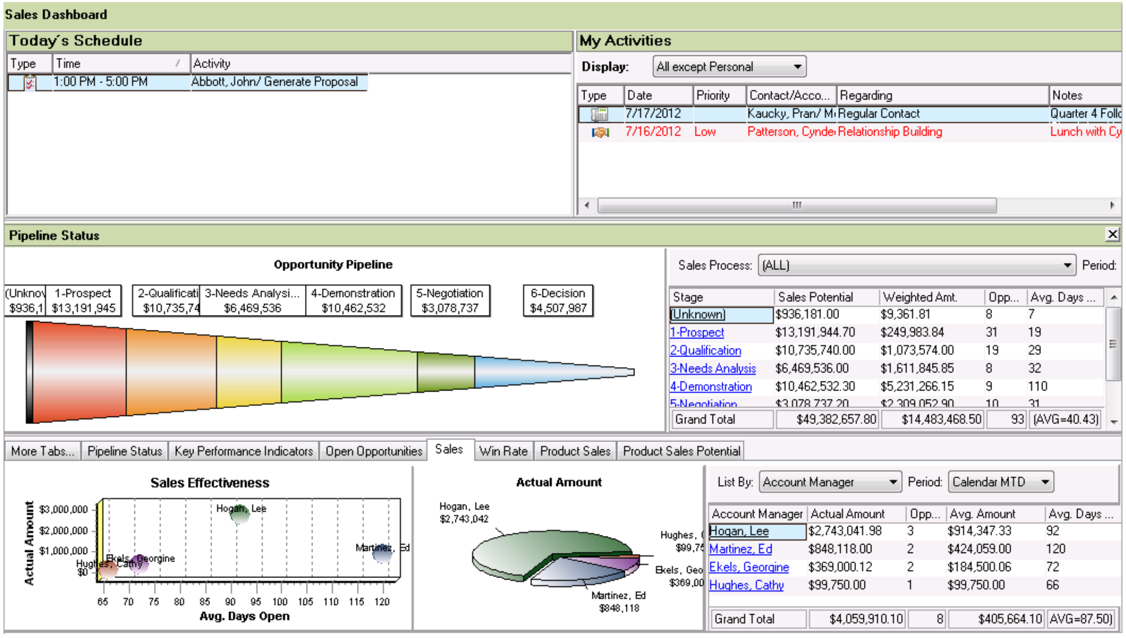
Activities Area - The activities area offers a view into your Sage SalesLogix activities. This area shows your schedule for the day, and your timeless and past-due activities. You can right-click on an item to open the original activity record for editing or review, or to schedule new activities.

Middle Pane - The middle pane (also called the user-defined area) serves as an open view of the content set you use most often. You can change the content set in this area depending on your specific needs, or close it to allow for more space to expand the Activities or content set areas.

Content Sets - These are graphs and a grid that give you a simplified view of business performance. You can change some of the data in content sets, and you can drill to an analysis view from most content sets.

To display the Sales Dashboard

- On the Navigation Bar, click **Dashboards**, and then click **Sales Dashboard**.


Sales Dashboard
Today's Schedule
My Activities
Pipeline Status
Opportunity Pipeline
(Unknov
$936,1
1-Prospect
$13,191,945
2-Qualificati
$10,735,74
3-Needs Analysi...
$6,469,536
4-Demonstration
$10,462,532
5-Negotiation
$3,078,737
6-Decision
$4,507,987
More Tabs...
Pipeline Status
Key Performance Indicators
Open Opportunities
Sales
Win Rate
Product Sales
Product Sales Potential
Sales Effectiveness
Actual Amount
$3,000,000
$2,000,000
$1,000,000
$0
Hogan, Lee
Martinez, Ed
Ekels, Georgine
Hughes, Cathy
65
70
75
80
85
90
95
100
105
110
115
120
Avg. Days Open
Actual Amount
Hogan, Lee
$2,743,042
Hughes, (
$99,75
Ekels, Geo
$369,00
Martinez, Ed
$848,118

Type	Time	Activity
	1:00 PM - 5:00 PM	Abbott, John/ Generate Proposal

Display: All except Personal

Type	Date	Priority	Contact/Acco...	Regarding	Notes
	7/17/2012		Kaucky, Pran/ M	Regular Contact	Quarter 4 Follc
	7/16/2012	Low	Patterson, Cynde	Relationship Building	Lunch with Cy

Sales Process: (ALL) Period:

Stage	Sales Potential	Weighted Amt.	Opp...	Avg. Days ...
(Unknown)	$936,181.00	$9,361.81	8	7
1-Prospect	$13,191,944.70	$249,983.84	31	19
2-Qualification	$10,735,740.00	$1,073,574.00	19	29
3-Needs Analysis	$6,469,536.00	$1,611,845.85	8	32
4-Demonstration	$10,462,532.30	$5,231,266.15	9	110
5-Negotiation	$3,078,737.20	$2,309,052.90	10	31
Grand Total	$49,382,657.80	$14,483,468.50	93	(AVG=40.43)

List By: Account Manager Period: Calendar MTD

Account Manager	Actual Amount	Opp...	Avg. Amount	Avg. Days ...
Hogan, Lee	$2,743,041.98	3	$914,347.33	92
Martinez, Ed	$848,118.00	2	$424,059.00	120
Ekels, Georgine	$369,000.12	2	$184,500.06	72
Hughes, Cathy	$99,750.00	1	$99,750.00	66
Grand Total	$4,059,910.10	8	$405,664.10	AVG=87.50)

Figure 16 Sales Dashboard

Using the Activities Area

The activities are contains two sections:

- The Today's Schedule section shows your scheduled activities for the current day.
- The My Activities section shows your timeless and past due activities. You can right-click on any activity to open and act on it, or to create new activities.

Using Content Sets

Content sets display performance data in both graph and grid formats. The emphasis in content sets is on the 'top five' results for the data displayed.

- The data in the graphs represent the data in the grid. You control the data in the grid by selecting filter parameters using drop-down menus above the grid. The grid will display the most significant five results for your filter selections, plus an additional row that summarizes all the data not included in the top five. A grand total row at the bottom of most grids calculates the results.
- The graphs reflect the grid data, When you adjust the filter parameters, the grid data changes automatically. The graphs also change to reflect the new gird data.
- The size of the graphs and the grid can be changed by moving their borders.

Changing Content Set Parameters

You can change content set parameters to see how processes and people are performing over time. You can select different aspects of a business process to examine, as well as select standard or custom time periods for comparison.

Our scenario:
You want to see the top performing account managers for the last 30 days and 90 days.

To view sales performance

1. On the Navigation Bar, click **Dashboards**, and then click **Sales Dashboard**.
2. Click the **Sales** tab.
   The content set opens and displays the grid and graphs associated with the content set.
3. In the **List By** menu, select **Account Manager**.
   The grid and graphs refresh.
4. In the **Period** box, select **Last 30 Days**.
   The grid and graphs refresh. Note the Grand Total information at the bottom.
5. In the **Period** box, select **Last 90 Days**.
   The grid and graphs refresh. Check the Grand Total information at the bottom to see if the information changed.

For more information see the "Using Contents Sets" topic in the Sales Dashboard Help.

Using Analysis Views

Analysis views display information similar to content sets, but they offer more options for filtering data. Analysis views are opened by clicking links on content sets.

- Like a content set, the grid is the key to an analysis view.The graphs represent the data in the grids. You control the data in the grid by using filters. A grand total row at the bottom of most grids calculates the results.
- You can select individual filter values from a variety of filter groups in order to precisely focus your search results.
- The size of the graphs and grid can be changed by moving their borders.
- Analysis view grid results can be exported to Microsoft Excel with a single mouse click.

Changing Analysis View Filters

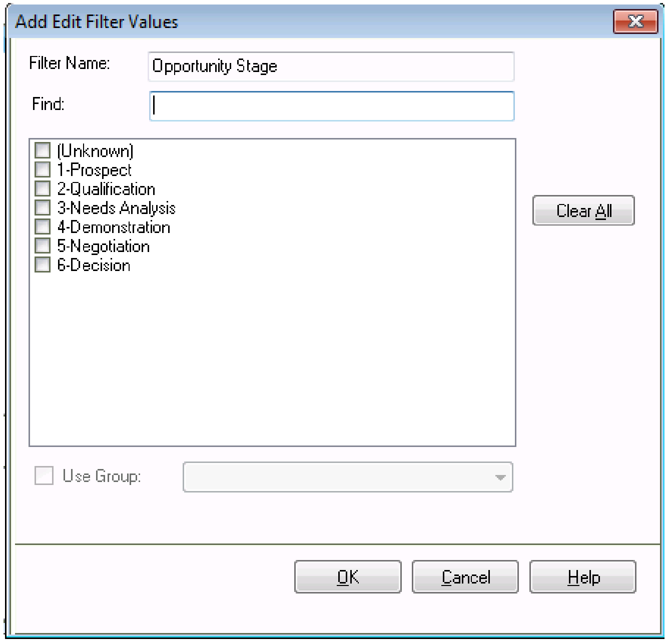
Filtering allows you to focus on specific data. For example, if you select Last 30-days from the Period box, the database returns results for the last 30 days only. You can further refine your results by drilling for more information.

Our scenario:
You want a detailed look at open opportunities in your company. Specifically you would like to know how much potential revenue each account manager has in the prospect stage of the opportunity pipeline.

To open an analysis view

1. On the Navigation Bar, click **Dashboards**, and then **click Sales Dashboard**.
2. Click the **Open Opportunities** tab.
3. Click the first hyperlink in the **Account Manager** column.
   This opens the Open Opportunities Analysis view window, with the Account Manager filter set to the parameter you selected from the Open Opportunities content set.

4. Click **Filter Options**.
   The filter pane opens with a list of filter items. Note that the Account Manager filter shows the account manager you selected in the previous step.
5. Click **Clear Filters** in the filter options panel on the left side of the analysis view.
   With the filter restriction removed, the grid and graphs refresh to display all available data for open opportunities. List By is still set to Account Manager.
6. In the **Value** column, click **ALL** next to the **Opportunity Stage** filter.
7. Click the **ellipsis** button in the **Value** column.
   The Add Edit Filter Values dialog box appears.



Add Edit Filter Values

Filter Name: Opportunity Stage

Find:

☐ (Unknown)
☐ 1-Prospect
☐ 2-Qualification
☐ 3-Needs Analysis
☐ 4-Demonstration
☐ 5-Negotiation
☐ 6-Decision

☐ Use Group:

Figure 17 Add Edit Filter Values dialog box

8. Select **1-Prospect**. You can search for values using the scroll bar or by typing in the **Find** box to refine your selection
9. When you are finished, click **OK**.
   The sales potential for open opportunities in the prospect stage are listed by account manager in the grid and graphs.

You can click Filter Options to hide the filter panel, which increases the viewable area for the grid and graphs in the analysis view.

10. To print the analysis view, on the **File** menu, click **Print Screen**.
11. To export the grid data to Microsoft Excel, click **Export to Excel**.
    An Excel workbook opens with all the grid columns and data represented. (Requires Microsoft Excel)

Only the number of rows displayed in the grid are exported. Use the Show Rows selector to display additional rows if required.

For more information see the "Selecting Filters in Analysis Views" topic in the Sales Dashboard Help.

Chapter 9

Using Sage SalesLogix Away from the Office

When you work outside the office, it is important that you are able to obtain up-to-date sales information for your company. By using the Sage SalesLogix Remote Client, you can have the tools to keep your information current with the information at the main office.

In this chapter you will learn to:

- Synchronize your Remote database with the main office database
- Use What's New to track changes to your local database
- Subscribe to accounts

Understanding Synchronization

Synchronization is an exchange of files between remotes and the main office. The following examples demonstrate the synchronization process.

- A Network user, working on a machine connected to your company's network, makes changes directly to the main office database.
- A Remote user, working on a machine connected to your company's network, makes changes directly to the main office database.
- Remote Office users make changes directly to the Remote Office database (as a Network user). The Remote Office connects to the main office to drop off and retrieve files using the same process as Remote users.
- Synchronization uses the files delivered by the Remote users and offices to resolve any conflicts, apply Remote user and office changes to the main office database, and then create files detailing changes for the Remote users and offices.

Synchronizing with the Main Office Database

To keep your Remote Client database current with the main office, it is important to synchronize regularly. If you do not synchronize every day or every other day, the databases with shared records (main office and Remote Clients) soon become out of date. Frequent synchronization also helps reduce synchronization time since a smaller number of transactions are processed.

Automatic Synchronization allows you to synchronize automatically when you first connect to the main office, and periodically thereafter while still connected. Automatic sync is enabled by default. To learn more, see the “Sage SalesLogix Synchronization Client” topic in the Sage SalesLogix Client Help.

To synchronize with the main office database

1. On the **File** menu, click **Synchronize**.
2. On the **Automatic Sync** tab, select **On**.

3. In the **Sync runs when you first connect and then every** boxes, set the time you want synchronization to occur.
4. Click the **Sync Options** tab.
5. To synchronize using a dial-up connection, select the **Connect using RAS** option, and then select your profile in the **RAS Profile** list. Clear the **Connect using RAS** check box if your are connecting via a network connection.
6. Click **Sync Now** to begin the synchronization process.
7. When the synchronization is complete, click **Close**.

If errors occur during synchronization, contact your system administrator to resolve them.

Reviewing Synchronization Changes

After synchronizing, you can use What’s New to see the changes that were made to your database.

To view synchronization changes using What's New

- On the Navigation Bar, click **What's New**, and then click on of the options of the bottom of the window.

Click	To check for
New	New accounts, contacts, opportunities, activities, notes, history, and documents.
Updated	Accounts, contacts, opportunities, activities, notes, and history you subscribe to that were changed by other users.
Deleted	Accounts, contacts, or opportunities deleted by other users.

Understanding Conflict Resolution

Because records that reside on both the main office database and Remote databases can be inserted or changed independently, a mechanism is needed to decide which changes are valid. The Conflict Resolution component of synchronization decides which change wins.

The administrator can identify up to three criteria to determine which user wins when a conflict occurs.

Conflicts are resolved when changes are applied to the Network database, not the Remote database.

Understanding Subscription

You can use subscription to select, or subscribe to, accounts you use on a regular basis and want to store on your local database. Using subscription minimizes your database size and the time required to synchronize updated information to the main office database. You and your system administrator can establish what accounts you need to subscribe to.

- You automatically subscribe to accounts you own as an individual or as a member of a team. You cannot unsubscribe to these accounts.
- Other Sage SalesLogix users that are added to your security profile (by the system administrator) can subscribe to the accounts you own as an individual or as a member of a team.

Activity auto-subscription: If a user is assigned to an activity as a member, but the account is not in his or her database, the user is automatically subscribed to the account. The exception is if the user does not have access rights; in that case, the user receives notification of the activity, but is not subscribed to the account.

To subscribe to an account

1. On the Navigation Bar, click **What's New**.
2. Click the **Accounts** tab.
3. Find the account you want to subscribe to,right-click, and then click **Subscribe**.
   You will receive updated information for this account during synchronization.

To unsubscribe from an account

1. On the Navigation Bar, click **What's New**.
2. Click the **Accounts** tab.
3. Find the account to which you no longer want to subscribe, right-click, and then click **Unsubscribe**.
   You will no longer receive updated information for this account during synchronization.

For more information see the "What is Synchronization?" and "Subscription and Security" topics in the Sage SalesLogix Client Help.

Index

A

Account manager 11
Account owner 11
Account ownership 11
Account Service Information 49
  button 49
Accounts
  adding 11
  associating 14
  contracts tab 48
  defined 11
  manager 11
  owner 11
  viewing history 25
Activities
  add members 22
  adding to tickets 51
  completing 21
  completing unscheduled activities 21
  Dashboard area 61
  defined 16
  invite others 22
  scheduling 16, 23
  tab 17
  unscheduled 21
  view 17, 24
Activities Reminder 19
Activities view 24
Adding
  account association 14
  activities to tickets 51
  activity members 22
  campaigns 41
  contact and account 12
  defects 56
  leads 37
  notes 17
  opportunities 33
  returns 53
  ticket activities 51
  tickets 49
Advanced Outlook integration
  inviting other users 22
Advanced Outlook Integration 2
Analysis views
  Sales Dashboard 62
Area-Category-Issue 49, 56
Asset
  serial number 36
Associating
  accounts 14
Automatic synchronization 65

C

Calendar 23
  day view 23
  month view 23
  week view 23
  year view 23
Campaigns 41
  adding 41
  adding products 44
  adding stages 42
  adding targets 42
  adding tasks 43
  defined 41
  launching 45
  overview 41
  tracking responses 45
Changes during synchronization 66
Closing
  defects 57
  opportunities 36
  returns 55
  tickets 52
Completing
  activities 21
Conflict resolution 66
Contacts
  adding 11
  defined 11
  look for matching records 12
  sending literature 15
Content sets 61
Contracts
  blanket 47
  days 47
  defined 47
  hours 47
  incidents 47
  overview 47
  perpetual 48
  value 48
Customer Relationship Management 11
Customer Service 47

D

Date Stamp 6, 50, 53, 57-58

Defects
  adding products 57
  adding to a ticket 56
  assigning 56
  closing 57
  defined 56
Detail view 8
  tabs 8
  user-defined area 8
Duplicates
  look for matching records 12

E

E-mail 30
  sending with mail merge 29
  sending with Outlook Integration 32
  setting SalesLogix Mail options 27

F

Filters
  Sales Dashboard analyisis view 62
Follow-up Activity 21

G

Group Button 5
Groups 1, 6

H

Help 9
History of account 25

I

Import
  leads from a list 39

L

Launching
  campaigns 45
lead
  convert 41
Leads 38
  adding 37
  defined 37
  importing from a list 39
  qualifying 40
Library 15
  accessing 15
  accessing remotely 15
  overview 15
List views 6
Literature requests 15
Literature Requests
  scheduling requests 15
Logging on 3
Lookup label 6
Lookups 1, 32

M

Mail Merge
  creating templates 29
  overview 1, 29
  private templates 28
  public templates 28
  send e-mail using 29
  templates 28
Manage Templates 28
Meetings
  inviting members 22
  scheduling 22
Menu Bar 5
Microsoft Outlook 30
  send an e-mail 32
Microsoft Word templates 28

N

Name Stamp 6, 50, 53, 57-58
Navigation Bar 5
Notes
  adding 17
Notes tab 18
Notes/History tab 18

O

Opportunities
  adding 33
  adding contacts to 33
  adding products to 33
  closing 36
  overview 33
  statistics 35
Outlook Integration 30
Owning accounts 11

P

Password 3
Phone calls
    scheduling 16, 23
Pick List 6
POP3/SMTP 27
Private templates 28
Products
    adding to a campaign 44
Public templates 28
Punch In/Out of a Ticket 52

Q

Qualifying
    leads 40
Quick Find 5
    example 14, 40

R

Related Documentation 2
Remote access 2
Remote users
    What's New 66
Reports
    overview 59
    running 59
Reports view 59
Resolution
    closing a defect 57
    closing a ticket 53
Responses for campaigns 45
Returns
    adding to a ticket 53
    associating assets 54
    closing 55
    defined 53
    shipped product 55
    shipping details 54

S

Sales Dashboard
    activities 60-61
    analysis view filters 62
    analysis views 62
    content sets 60
    opening 60
    overview 60
Sales support 10
Scheduling follow-up activities 16, 23
Scheduling meetings 22
Send SLX 30
Settings 27
    e-mail options 27
Shortcut menus 6
SpeedSearch 53
Split View 9
Stages 42
Standard Toolbar 5
Statistics
    opportunity 35
Status
    closing a defect 57
    closing a return 55
    closing a ticket 52
    closing an opportunity 36
Status Bar 6
Subscribing to an account 67
Subscription 67
Synchronization
    conflict resolution 66
    frequency 65
    overview 65
    reviewing changes 66

T

Tabs 6
    detail view 8
Targets
    adding to a campaign 42
Tasks 43
Technical support 10
Templates
    creating 29
    overview 28
    private 28
    public 28
Ticket Activities
    charge type 51
    defined 51
    end date 51
    timed using Punch In/Out 52
Ticket Activities tab 51
Tickets 49
    Account Service Information 49
    adding 49
    adding a return 53
    Area-Category-Issue 49
    closing 52
    defects tab 56
    description 50

    insert new activity 51
    punching in or out 52
    resolution 53
    submit for SpeedAearch 53
    ticket activities tab 51
    tracking time 52
Time Stamp 6, 50, 53, 57-58
Title Bar 5
Toolbar 5
Tracking
    campaign responses 45
    time for tickets 52
Training 10

U

Unscheduled activities 21
Unsubscribe from an account 67

V

Viewing
    scheduled activities and events 23

W

What's New 66
Workspace 4