



Sage SalesLogix v7.5.3 | Client Feature Comparison

Feature	Windows	Web	Mobile
General User Features			
Perform Look-ups	✓	✓	✓
Right mouse click to functions	✓	✓	n/a
"Hot key" shortcuts to functions	✓		n/a
E-mail from contact record	✓	✓	✓
Mail Merge	✓	✓	n/a
Remote (disconnected) use	✓	✓	✓
Create Groups	✓	✓	n/a
Welcome Page/Personal Workspaces		✓	
Multi-tab expansion		✓	n/a
Associate attachments to activities	✓	✓	n/a
Manage Tools drop-down menu	✓	✓†	n/a
Details Pane in Activities Workspace		✓**	
Unsaved data notification		✓**	
Visual indicators for attachments in Activities and Calendars		✓†	
Mass actions in Activities		✓†	
Desktop Integration (drag and drop attachments, drag and drop e-mail from Microsoft Outlook®, Send SLX and Record to History, mail merge, export to Excel, and drag and drop Library files [Administrator only])	✓	✓‡	
Merge two duplicate Accounts or two duplicate Contacts into one record.	✓	✓‡	
Sales			
Account and Contact management	✓	✓	✓
Automate sales processes	✓	✓	n/a
Opportunity management	✓	✓	✓
Activity management	✓	✓	✓
Lead capture	✓	✓	n/a
Lead qualification	✓	✓	through customizations
Lead conversion	✓	✓	through customizations
Literature fulfillment	✓	✓‡	n/a
Schedule literature requests	✓	✓	n/a
Create sales orders	✓	✓	through customizations
Sales Orders Main View (separated from Opportunity View)		✓†	
View Opportunity Snapshot	✓	✓	
View Opportunity Statistics	✓	✓	n/a

*Requires New Web platform

**Requires Sage SalesLogix v7.5.1

†Requires v7.5.2

‡Requires v7.5.3

Functionality may vary across Sage SalesLogix Clients.

Feature	Windows	Web	Mobile
Marketing			
Create Campaigns	✓	✓	n/a
Track Campaign responses	✓	✓	n/a
E-mail marketing	✓	✓	n/a
Campaign reporting	✓	✓	n/a
Perform lead-duplication upon conversion to opportunity	✓	✓	n/a
Perform lead-duplication upon import		✓	n/a
Associate activities to leads	✓	✓	n/a
Automatic lead distribution	✓	✓	
Perform import actions to leads	✓	✓	
Create responses for leads tied to campaigns	✓	✓	
Group Actions in Leads List view		✓**	
Customer Service & Support			
Create, edit, manage tickets	✓	✓	✓
View Tickets and related information (i.e., resolutions, service history, defects, assets, and returns)	✓	✓	✓
Create, edit, manage Defects	✓	✓	through customizations
Create, edit, manage Contracts	✓	✓	through customizations
Manage Assets (associated products) for Account, Ticket, and Ticket Activity Parts	✓	✓	through customizations
SpeedSearch	✓	✓	
Dashboards & Reporting			
View key performance metrics such as pipeline status, open opportunities, and win rate	✓	✓	✓
Generate Reports	✓	✓	n/a
User customizable dashboard widgets to personalize Welcome page tabs (group list, links, and charting widgets)		✓†	
Advanced Outlook Integration (functionality differs by client)			
Record e-mail to Sage SalesLogix history	✓	✓	✓ (Blackberry® Only)
Access Sage SalesLogix Address Book in Microsoft® Outlook®	✓		n/a
Attendee availability tab	✓		n/a
Add Contact to Outlook button	✓		n/a
Intellisync for synchronization of Contacts and Calendar items	✓	✓	n/a
Sage SalesLogix Exchange Link to synchronize Contacts, Calendar, and Tasks between Outlook and Sage SalesLogix for Windows, Web, and Mobile	✓	✓	✓
Administration/Customization			
Administrative “manage” menu screens (i.e., manage picklists, competitors, etc.)	✓	✓†	n/a
Administrative data maintenance utilities (i.e., merge records, check for duplicates, etc.)	✓		n/a
Territory realignment	✓		n/a
Assign Contact processes	✓	✓	n/a
Process orchestration	✓	✓	n/a
Create, edit, and publish Mashups and embed anywhere within the Web Client	✓*	✓	n/a
Field Level Security	✓	✓**	
RESTful Web Services	✓*	✓	
Remote/Disconnected Client	✓	✓	
Lotus Notes compatibility	✓	✓**	
Firefox compatibility		✓**	
Enhanced Developer Experience (API Reference Guide, best practices document, and new Developer Community)	✓†	✓†	✓†
Web-based Administrator Tool		✓‡	

“Sage SalesLogix has transformed the way we do business. Every opportunity is visible and accessible to everyone. We’ve got the facts right in front of us—there’s no hunting for a file folder.”

— Mike McGuire
Managing Partner and Vice
President of Sales Zink
Foodservice Group

About Sage SalesLogix

Sage SalesLogix provides a complete view of customer interactions across departments—providing information and insights for better planning, managing, and forecasting. Your teams will have the tools to increase sales, reach more profitable customers, enhance the customer experience, and anticipate customer needs. Sage SalesLogix offers flexible access, deployment, and payment options to address business requirements.

About Sage Group, plc

Sage is a leading supplier of business management software and services to 5.8 million customers worldwide. From small start-ups to larger organizations, we make it easier for companies to manage their business processes.