



## Sage SalesLogix v7.5.3 | Upgrade Comparison Chart

Feature	v6.2		v7.0		v7.2		v7.5	
	Win	Web	Win	Web	Win	Web	Win	Web
<b>Sales</b>								
Opportunity Snapshot for quick summary of important details	✓	✓	✓	✓	✓	✓	✓	✓
Opportunity Statistics	✓		✓		✓		✓	✓
Email key opportunity data to managers with one click	✓	✓	✓	✓	✓	✓	✓	✓
Update multiple opportunities at one time	✓	✓	✓	✓	✓	✓	✓	✓
Input sales order	✓		✓		✓		✓	✓
Sales Orders Main View (separated from Opportunity View)								✓†
Input opportunity data such as description, estimated close, status, source, close probability, and products	✓	✓	✓	✓	✓	✓	✓	✓
Associate multiple contacts and competitors and select sales process	✓	✓	✓	✓	✓	✓	✓	✓
Add multiple products or product packages quickly and input discount and quantity	✓	✓	✓	✓	✓	✓	✓	✓
Set opportunity defaults at admin or user level to streamline input and ensure accuracy, including status, type, probability, and sales process	✓	✓	✓	✓	✓	✓	✓	✓
Export opportunity information to Microsoft® Excel® or launch new opportunity reports instantly	✓	✓	✓	✓	✓	✓	✓	✓
Multi-Currency Support <ul style="list-style-type: none"> <li>• Designate a system-wide base currency and manage multiple alternate currencies</li> <li>• Lock currency rates if opportunities require</li> <li>• Generate proposals reflecting native customer currency</li> </ul>	✓	✓	✓	✓	✓	✓	✓	✓
Configure sales processes without admin rights	✓	✓	✓	✓	✓	✓	✓	✓
<b>Marketing</b>								
<b>Lead Management</b>								
Import leads lists	✓		✓		✓	✓	✓	✓
Perform Lead de-duplication upon import								✓
Perform import actions to Leads								✓
Assign activities to Leads							✓	✓
Create Responses for Leads								✓
Automatic Lead distribution§							✓	✓
Lead Qualification/Checklist			✓		✓	✓	✓	✓
Campaign Management/ROI and budget tracking			✓		✓	✓	✓	✓
Email Marketing	✓		✓		✓	✓	✓	✓
Segmentation and Groups			✓	✓	✓	✓	✓	✓
Group Actions for Leads List view								✓**

\*\*Requires Sage SalesLogix v7.5.1

†Requires v7.5.2

§Requires additional customization.

Feature	v6.2		v7.0		v7.2		v7.5	
	Win	Web	Win	Web	Win	Web	Win	Web
<b>Customer Service and Support</b>								
Automatically assign tickets to appropriate resource	✓	✓	✓	✓	✓	✓	✓	✓
Track ticket ID, contact info, type, status, urgency, assignment, date needed	✓	✓	✓	✓	✓	✓	✓	✓
Create new service tickets from Account, Contact, and other locations	✓	✓	✓	✓	✓	✓	✓	✓
Schedule phone calls, meetings, or to-dos to follow up on open issues	✓	✓	✓	✓	✓	✓	✓	✓
Send email with attachments and record correspondences and activity history	✓	✓	✓	✓	✓	✓	✓	✓
Submit issue descriptions and resolutions for archiving in the knowledge base	✓	✓	✓	✓	✓	✓	✓	✓
Create ticket groups, lookups, and reports	✓	✓	✓	✓	✓	✓	✓	✓
Track ownership and individual time spent on customer issues	✓	✓	✓	✓	✓	✓	✓	✓
Associate Asset to Ticket	✓	✓	✓	✓	✓	✓	✓	✓
Add "Parts" to Ticket			✓		✓		✓	✓
Ticket Activities = "Labor"			✓		✓		✓	✓
Associate Contract to Ticket			✓		✓		✓	✓
Service Contract Management	✓		✓		✓		✓	✓
Create, edit, and manage Returns	✓		✓		✓		✓	✓
Create, edit, and manage Defects	✓		✓		✓		✓	✓
Manage Assets (associated products) for Account, Ticket, and Ticket Activity Parts	✓		✓		✓		✓	✓
Punch in/punch out to track time spend on issues	✓	✓	✓	✓	✓	✓	✓	✓
SpeedSearch (locate resolutions to customer issues quickly)	✓	✓	✓	✓	✓	✓	✓	✓
Customer Self-Service Web Portal	✓	✓	✓	✓	✓	✓	✓	✓
<b>Usability</b>								
Remote/Disconnected Client	✓		✓		✓		✓	✓
Share access to Groups (lists) between users easily and release changes	✓	✓	✓	✓	✓	✓	✓	✓
Copy key contact information to notepad automatically for use in an email or document	✓	✓	✓	✓	✓	✓	✓	✓
Global date/time support for Activities & Calendaring <ul style="list-style-type: none"> <li>Automatically convert all dates and times to users' local time</li> <li>Access a time-zone calculator when scheduling meetings with other regions</li> </ul>	✓	✓	✓	✓	✓	✓	✓	✓
Expanded copy/move Contacts			✓	✓	✓	✓	✓	✓
Associate attachments to Activities							✓	✓
Ability to have multiple middle panes								✓
Summary View of Lists								✓
Mashups capabilities and embedded timelines of events							✓*	✓
Welcome Page/Personal Workspaces						✓		✓
User customizable dashboard widgets to personalize Welcome page tabs (group list, links, and charting widgets)								✓†
Unsaved Data Notification								✓**
Visual indicators for attachments in Activities and Calendars								✓†
Mass actions in Activities								✓†
Details Pane in Activities Workspace								✓**
Manage Tools drop-down menu	✓		✓		✓		✓	✓†
Desktop Integration (drag and drop attachments, drag and drop email 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.	✓		✓		✓		✓	✓†

Functionality may vary across Sage SalesLogix Clients.

\*\*Requires Sage SalesLogix v7.5.1

†Requires v7.5.2

‡Requires v7.5.3

Feature	v6.2		v7.0		v7.2		v7.5	
	Win	Web	Win	Web	Win	Web	Win	Web
<b>Administrative</b>								
Express Installation for faster one-server implementations	✓	✓	✓	✓	✓	✓	✓	✓
Copy and paste licenses as a group from an email or text file	✓	✓	✓	✓	✓	✓	✓	✓
Import new users directly from Microsoft® Windows® (Active Directory not required)	✓	✓	✓	✓	✓	✓	✓	✓
Secure HTTPs sync option			✓	✓	✓	✓	✓	✓
One-click remote database install for Web							✓	✓
One-click remote database install for Windows			✓	✓	✓	✓	✓	✓
Customizable Integrity Checker			✓	✓	✓	✓	✓	✓
Process Orchestration <ul style="list-style-type: none"> <li>• Create a process for any entity (not just Opportunities and Contacts)</li> <li>• Create single step or sophisticated multi-step/stage processes</li> </ul>							✓	✓
Field Level Security	✓		✓		✓		✓	✓**
Lotus Notes Compatibility	✓		✓		✓		✓**	✓**
Firefox Compatibility								✓**
Web Administrator Tool								✓†
<b>Customization</b>								
Create main views with full features of the standard views, including tabs and Groups, to extend Sage SalesLogix functionality beyond Accounts/Contacts/Opportunities/Tickets	✓	✓	✓	✓	✓	✓	✓	✓
Display non-modal forms or dialog boxes in a main view “container”	✓	✓	✓	✓	✓	✓	✓	✓
Configure Sales Processes stages, steps, and actions in Application Architect and bundle for release						✓	✓	✓
Utilize simplified setup and maintenance of Area/Category/Issue picklists			✓	✓	✓	✓	✓	✓
Customize Activities main detail view			✓	✓	✓	✓	✓	✓
Customize Report Manager			✓	✓	✓	✓	✓	✓
Add custom fields to base Sage SalesLogix tables			✓	✓	✓	✓	✓	✓
Enable non-Sage SalesLogix tables and views for use in Sage SalesLogix customizations			✓	✓	✓	✓	✓	✓
Sage SalesLogix Profiler utility			✓	✓	✓	✓	✓	✓
Sage SalesLogix Security API for custom security			✓	✓	✓	✓	✓	✓
.NET extensions for Windows Client			✓	✓	✓	✓	✓	✓
Standards-based architecture including ASP.NET, AJAX, and CAB for easy integration and expansion						✓		✓
Code editor for advanced customizations or leverage .NET tools					✓	✓	✓	✓
One-click deployment for Web and mobile customizations						✓		✓
Bundle and share customizations (Windows)	✓	✓	✓	✓	✓	✓	✓	✓
Bundle and share customizations (Web)					✓	✓	✓	✓
Ability to expose Sage SalesLogix entities to RESTful-based Web Services							✓*	✓
Charting, sparklines, and image controls							✓*	✓
Launch model entity wizards from Application Toolbar								✓
View which entities have been customized from the project tree view								✓
Dockable data sources view								✓
Access to form control settings from new code snippet action								✓
Portal Creation Wizard								✓
Lookup Control Setup Wizard								✓**
Panel Control								✓**
MultiTab Control								✓**
Mashup Data Source Control								✓**
Picklists in Properties								✓†
Enhanced Developer Experience (API Reference Guide, best practices document, and new Developer Community)							✓†	✓†

Functionality may vary across Sage SalesLogix Clients.

\*Requires New Web platform

\*\*Requires Sage SalesLogix v7.5.1

†Requires v7.5.2

‡Requires v7.5.3

**Upgrade Today!**

- Contact your Business Partner, or
- Call 800-643-6400 to speak to a Sage representative, or
- Visit [www.sagesaleslogix.com](http://www.sagesaleslogix.com)

**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.

