

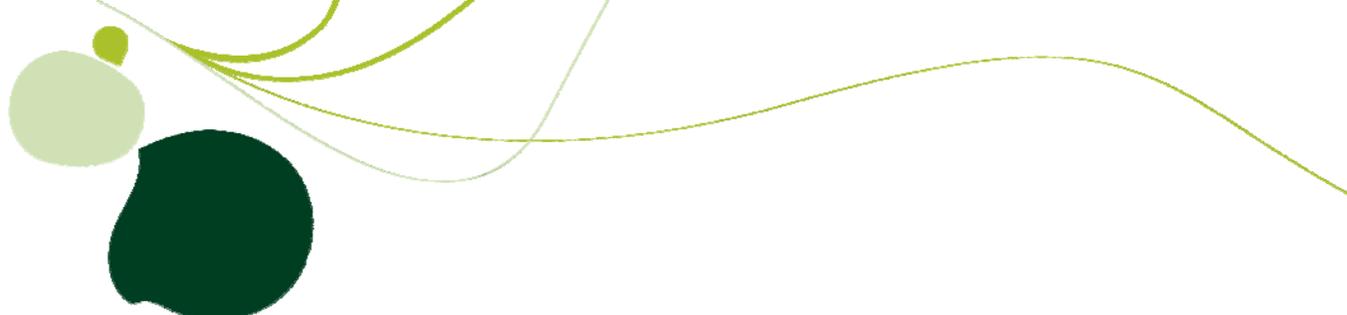
# Sage SalesLogix

Version 7.5 Survival Guide for Sales

Last updated June 2010—SP3 Update



sage



# Addendum: Sage SalesLogix v7.5.3

## Service Pack Overview

Sage SalesLogix v7.5.3\* features numerous enhancements such as desktop integration, a new Web administrator tool, role-based security for the Web Client, and sleek new widgets for the newly refreshed personal workspace tabs.

\*Features available in Sage SalesLogix Web Client only.

### **New Web Administrator Tool:**

This new tool does not replace the current SalesLogix Administrator, which you'll still have to access to do some things; however the new Web-based administrator lets you access common administrator tasks via the Web such as managing users and teams, pick lists, products, etc.

- Competitors: Add, edit, or delete competitors that can be associated to an opportunity.
- Departments: Add, edit, or delete departments that can be used as a specialized team.
- Lead Sources: Add, edit, or delete lead sources that identify how a contact or lead was created.
- Literature Items: Add, edit, or delete literature items available for literature requests.
- Library: Add, edit, or delete library folders and documents.
- Pick Lists: Add, edit, or delete pick lists to help users improve data consistency.
- Products and Packages: Add, edit, or delete products and product packages (a collection of products) that can be associated to an opportunity or sales order.
- Teams: Add, create and manage teams that can be used to define account ownership and access.
- Users: Add users, manage profiles, and set security.
- Roles: Manage a user's access to Web Client features by role.

### **Enhancement to Library**

- Manage Library folders and documents.

### **Update to Literature Requests**

- Fulfill, complete, or reject literature requests.

### **Merge Account/Contacts**

- Merge two duplicate Accounts or two duplicate Contacts into one record.

## Desktop Integration for:

- Drag and Drop Attachments
- Drag and Drop E-mail from Microsoft Outlook
- Outlook Integration: Send SLX and Record to History
- Mail Merge
- Export to Excel
- Drag and Drop Library files (Administrator only)

All of these features are browser agnostic, i.e., Firefox or Internet Explorer.

## Sleek New Welcome Page Widgets

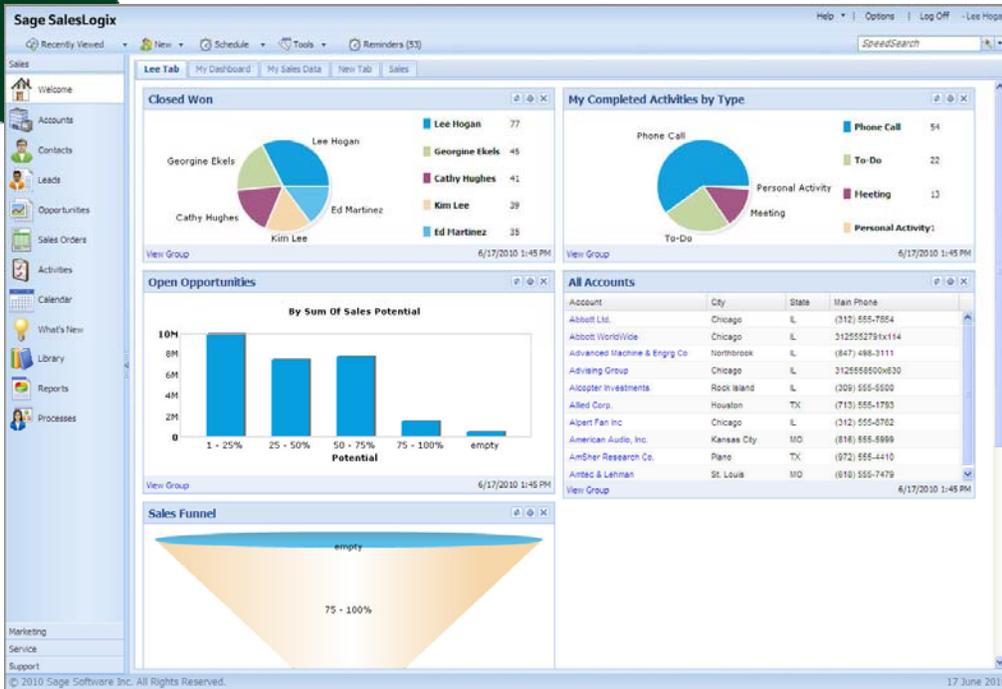
Coupled with a visual refresh to the Welcome page, v7.5.3 offers new widgets enabling users to further personalize their Welcome page and workspace tabs and share that content with other users.

- Group List Widget: customize to show a list for any entity or group within an entity, set list to show top number of records (e.g., top 10 opportunities), and work with it or sort it as you would a standard grid
- Link Widget: lets you bookmark your favorite areas or entities in the product or even favorite Websites or sources outside Sage SalesLogix
- Charting Widgets: create custom charts for any entity, group, dimension (filter) and metric that enable you to analyze data including bar, column, funnel, line, and pie charts

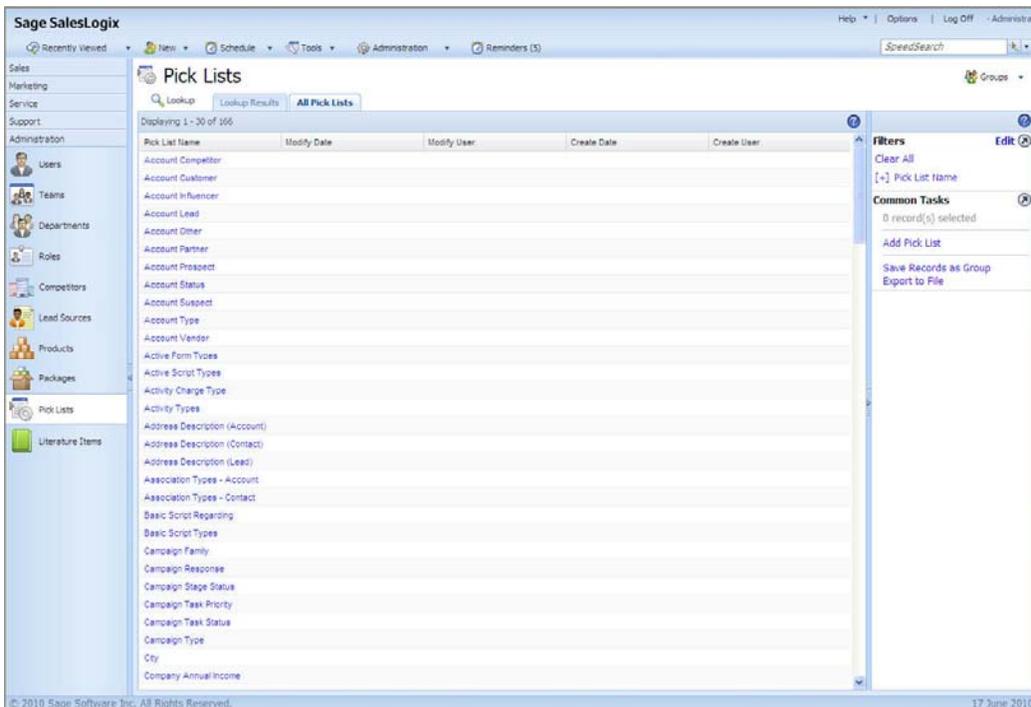
The screenshot displays the Sage SalesLogix desktop application interface. The main window is titled 'Sage SalesLogix' and shows a 'Welcome' page with several widgets. The 'Welcome' widget includes a greeting and a brief overview of the system. Below it is a 'Recently Viewed' section. The 'Today's Activities' widget lists several tasks with their scheduled times and participants. The 'My Notes' widget contains a table of notes with columns for Description, Notes, Leader, and Completed Date. The 'Quick Actions' widget provides shortcuts for tasks like 'Schedule a Meeting' and 'Schedule a Phone Call'. The 'Do You Know...' widget offers help links for various system features. The 'Links' widget provides access to external resources like the Sage SalesLogix Website and Online Support. The interface is clean and organized, with a navigation pane on the left and a top menu bar.

Description	Notes	Leader	Completed Date
	kuhuh	Lee Hogan	06/17/2010
	Chuck is out until next week. Will L...	Lee Hogan	06/18/2010
Lead Conversion Notes	[Conversion Information] Date: 6/1...	Lee Hogan	06/15/2010
Lead Conversion Notes	[Interested In] One laptop and acc...	Lee Hogan	05/04/2007
Proposal	Sent proposal w/ 10% discount.	Lee Hogan	04/18/2007
Will Attend	Contact will attend the seminar.	Lee Hogan	04/13/2007
Will Attend	Contact will attend the seminar.	Lee Hogan	04/13/2007
Will Attend	Contact will attend the seminar.	Lee Hogan	04/13/2007
Notes on configuration	Had some special configuration q...	Lee Hogan	04/13/2007

*Refreshed Welcome Page gives you quick and easy access to the information you use the most.*



*New Widgets let you easily create a personalized workspace with the business intelligence information you need to make informed decisions.*



*New Web-based Administrator lets you manage users, teams, roles, literature items, pick lists and more via a Web browser.*

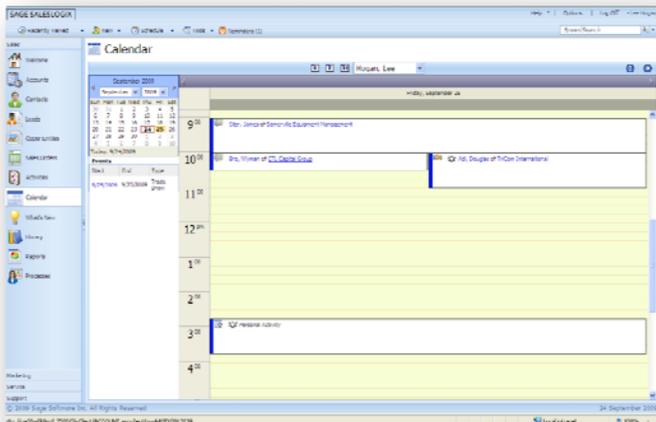
# Addendum: Sage SalesLogix v7.5.2 & SalesLogix Mobile v5.6 Releases

## Service Pack Overview

Sage SalesLogix v7.5.2 focuses on usability, quality and performance, partner adoption, and the customization experience. Activities and calendar enhancements, such as the ability to select and dismiss multiple reminders at once, streamline the user experience. Performance improvements target bandwidth issues and minimize latency. Improvements have been made to support multiple multi-byte languages in the area of Unicode. Additionally, this release introduces a new developer community enabling members to exchange ideas and code samples—enhancing developer productivity. In tandem with this release, Sage SalesLogix Mobile v5.6 includes improved calendar integration, Sdata support, BlackBerry Storm UI and navigation updates, and support for high-resolution devices.

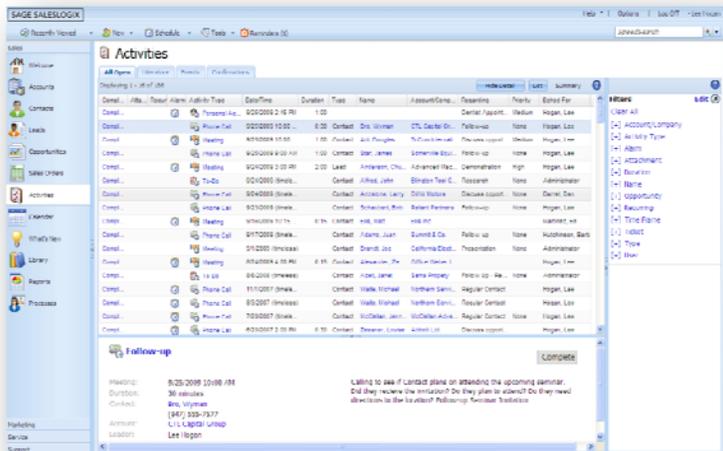
## New Features/Benefits

### Calendar Enhancements



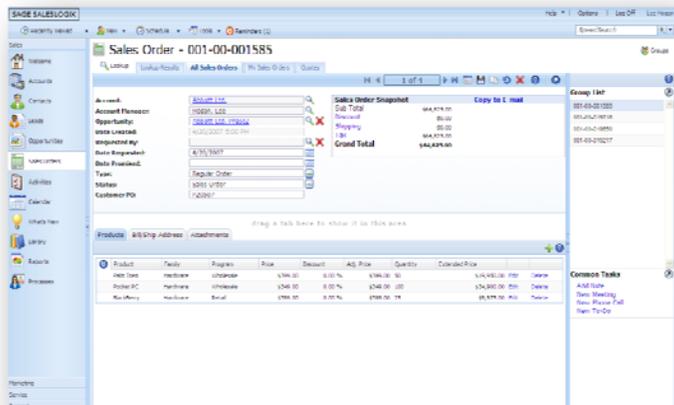
- Visual indicator for attachments in activity main view and calendar
- Hyperlinks in calendar to accounts, contacts, tickets, opportunities, etc.
- Performance improvements to speed up page load times

## Activity Enhancements



- Perform more actions in the Reminders window for improved efficiencies including the ability to confirm or decline activity confirmations and mass delete activities
- User interface design and layout enhancements make the Reminders view easier to use and navigate
  - New check boxes make it quick and easy to mass dismiss and snooze individual, multiple, or all reminders in a single step
  - Reminders button in toolbar is highlighted when new reminders are triggered so you're on top of tasks
  - Click on an Activity for more information in convenient pop-up window

## Additional Web User Experience Improvements



- Sales Orders were added as a new main view in the Web Client so you can create sales orders independent from Opportunities
  - Sales Library includes folder hierarchy to streamline organization and navigation
  - Customize look-up field defaults to your preferences
  - Customize logoff/redirect page capability sends users to a specified page when the Web client times out or user logs off instead of sending them to the default login page, which helps ensure security. This release also accommodates single sign-ons.

## Improved Customization Experience

- More selections available in Application Architect picklists, which helps reduce entry mistakes
- Add multiple preconditions on triggered database events in the process orchestration engine, which helps to support more complex processes
- Sdata v1.0 support
  - New features include support for batch processing, asynchronous operations, template support, and schema discoverability.
  - Sdata documentation is now publically available at <http://interop.sage.com> to help answer your questions.

## Intellisync Improvements

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- Intellisync Health Check helps you troubleshoot installation and configuration issues.

### **Web Client Performance Enhancements**

- Significant performance improvements in the areas of navigation, Activities, Calendars, and more help increase page loading times and reduce bandwidth.

### **New Developer Documentation**

- API Reference Guide
- Best Practices Documents
  - Intellisync Architecture
  - Exchange Link Architecture
  - Tuning & Performance Optimizations in Sage SalesLogix

### **New Developer Community**

- New Sage supported forums for developers to exchange ideas, code samples, bundles, etc.—making it quicker and easier to customize in Sage SalesLogix.

### **Sage SalesLogix Mobile v5.6**

- Calendar sync compatibility ensures email and activity sync engines work together without creating duplicates in SalesLogix, SalesLogix Mobile, or Outlook
- User interface and navigation updates to support touch-screen BlackBerry Storm
- Support for high-resolution devices
- Support for Sdata enables ad-hoc retrieval of account and contact information without having to store data locally on the device
- Now supports Windows Server 2008, Oracle 11g and Windows Mobile OS 6.5

# Addendum: Sage SalesLogix v7.5.1 Update

## Overview

Version 7.5 catapulted Sage SalesLogix ahead of its competition with leading edge technology that enabled better ways to access data anywhere and seamlessly bring in data from outside of the application. Sage SalesLogix v7.5.1 continues to raise the bar and strengthen its place in the CRM market bringing value back to end users through interfaces designed to simplify how work gets done. A new activities workspace increases productivity by allowing users to manage their day through a simple interface. Filter enhancements enable users to decide how they want to view their data. Disconnected Web Client enhancements help users be productive even while disconnected. In addition, Web/LAN parity improvements, such as role-based, field-level security, as well as new controls and other enhancements help improve the customization and administration experience.



**NOTE: These features rated high among the Sage SalesLogix Customer Advisory Board on 11/14/08.**

## End-User Features/Benefits

### Newly Designed Activities Workspace



- **Details Pane:** enables users to select an activity from the List view to see more information and notes in a summary box below. The Details Pane can be customized by an administrator to appear in any SalesLogix entity.
- **Summary Button:** enables users to switch to Summary view for additional information.
- **Short-cut Menu:** allows users to right-click on the Activities icon in the left navigation bar or within the Activities List view to easily manage activities such as scheduling a phone call or meeting, without having to be in the Activities area.
- **Task Pane Filters:** enables users to use convenient filters to sort through data and create useful views of information while in the Activities Workspace (see Filter Enhancements below for more details.)

### Filter Enhancements

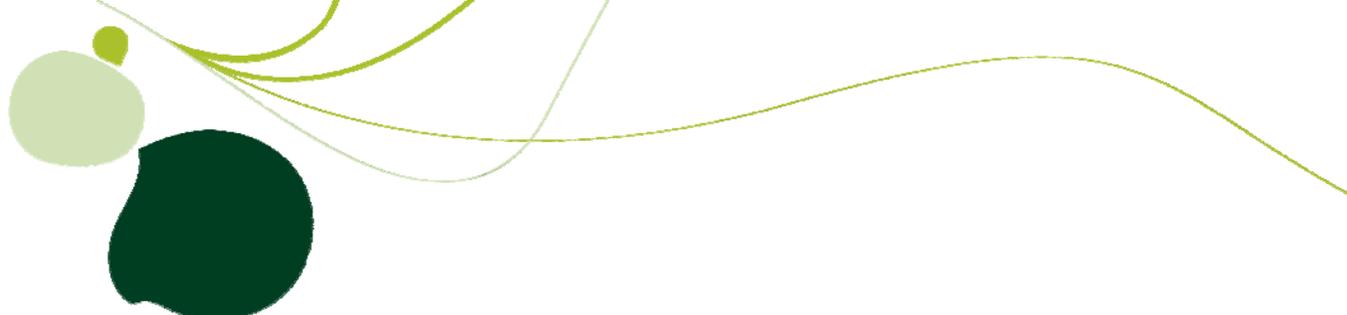
- **Task Pane Filters** have been enhanced to include alpha and numeric ranges that help segment data into useful, simplified views. Data ranges for various filter criteria, like Accounts and Contacts, are provided out of the box, or they can be customized by an administrator to address unique business and user requirements. The new filter enhancements also allow users to define "short lists" of the accounts, contacts, etc. they interact with the most. Additionally, these short lists will persist across sessions.

### My Workspace Enhancements



- **Multiple Tabs** enables end users to create as many personal workspace tabs as they need, in addition to the out-of-the-box My Workspace tab that was updated in the v7.5 release, matching their unique preferences and work styles.

### Disconnected Web Client Enhancements

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- **Subscription to Accounts** enables disconnected Web Client users that sync up with the host database to use the What's New view to see any updates to accounts that they subscribe to, or they can subscribe to any new accounts that they have access to.
  - **Mail Merge Enhancements** allows disconnected Web Client users to use Mail Merge functionality.



**Unsaved Data Notification** shows users a visual cue to save data, as well as provides the user-defined option of being prompted to save data when navigating to other areas of the application.

**Group Actions for Leads List View** enables sales and marketing professionals to select multiple leads at once and perform actions such as mass delete, mass assign owners, or save to a group—increasing productivity levels.

## Administrator Features/Benefits



**Field-level Security** allows administrators to apply field-level, role-based security for the Web Client, definable in Administrator—eliminating the need to create custom views/forms. Using this simple, time-saving feature, administrators can choose security levels for each field (including read only, read/write, or no access) and save as roles in an organization, for instance Field Sales.

**Lotus Notes Compatibility** provides organizations using Sage SalesLogix v7.5.1 with the flexibility to use Lotus Notes v7 or v8.

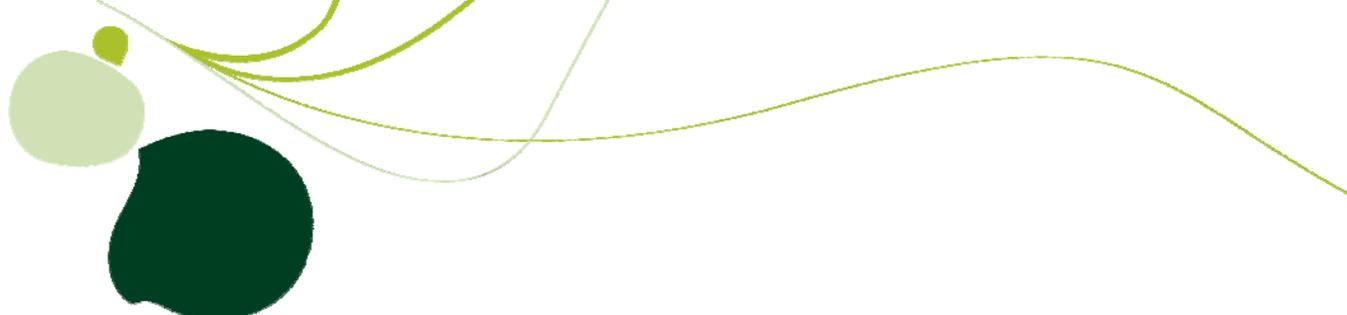
**Firefox Compatibility** enables organizations to use Firefox v3 Web browser, which significantly improves page loading performance. Note: Mail Merge, export to Microsoft Excel, and SendSLX/Outlook integration are not supported.

## Customizer Features/Benefits



### Controls

- **MultiTab Control:** allows customizers to use this popular and common customization requirement in the Application Architect for the Web Client. Customizers can layer groups of controls in the same space on the form. As in a set of tabbed pages, users can change the visible group by clicking tabs, or the application can change it through code. Applying multiple tabs to the application saves interface real estate and provides a better user experience.
- **Panel Control:** enables customizers to group controls or to evenly space controls in an area of the form. Now they can customize the look of a panel instead of just flow-based columns.
- **Lookup Control Setup Wizard:** enables customizers to harness powerful lookup control capabilities through a simple set of steps. This convenient wizard simplifies the complex process, as it guides them through the necessary steps of creating or editing lookups, and automatically exposes interdependencies based on the properties they choose.
- **Sparkline Control:** improves how you can present data to the user by leveraging different types of charts including bar, smooth, discrete, bullet, impulse, column, and pie. Sparklines have been repackaged as a drag and drop control reducing the need to use code.
- **Bevel Option for Panel Control:** permits customizers to show a border around a group of controls.



## Mashups

- **Mashup Data Feed Debugger** provides the ability to run all or part of a mashup from within the Application Architect without having to deploy it to a portal so it can be debugged.
- **New Mashup Data Source Control** binds a mashup source from the QuickForm editor to a control eliminating the need to use code and reducing development time.

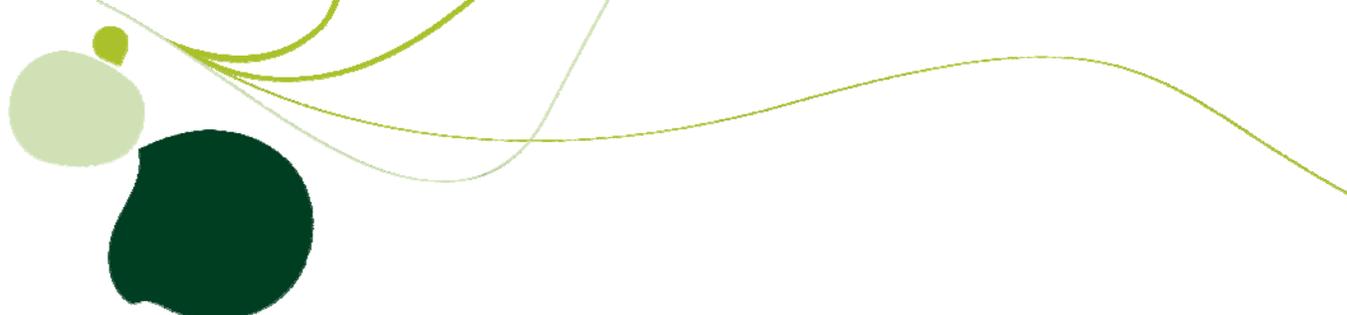
### Application Architect Environment:



- **One-Click Build/Deploy/View:** significantly reduces the time required to release and test customizations with one-click access to the Web Client.
- **Design Time Debugging of Mashup Data Feed:** provides the ability to run all or part of a mashup from within the Application Architect without having to deploy it to a portal so it can be debugged.
- **New Mashup Data Source Control:** binds a mashup source from the QuickForm editor to a control eliminating the need to use code and reducing development time.
- **Bundle Password Support** enables customizers to require a password to install bundles.

## User Survey

Sage SalesLogix v7.5.1 includes an embedded feedback survey so Sage can collect information specifically related to the work practices and feature usage from its valued customers—it is not a sales or marketing survey. This feedback is meant to help the Sage SalesLogix development team improve the user experience. Users may be invited to participate in the survey, depending on their implementation. When prompted, they may choose whether or not to participate or to be reminded to participate later. Note: Sage SalesLogix Business Partners can also add questions to the survey.



## Sage SalesLogix v7.5: How v7.5 Fits into Our Overall Product Direction Strategy

Audience: Internal Sage employees and business partners

Sage SalesLogix v7.2 delivered an all new state-of-the-art platform, which was a key directional statement toward our future product direction and strategy including a common development environment across clients; a “write once, deploy to many” development environment; continued advances in codeless customizations; and improved user experience. Sage SalesLogix v7.5 is the next major step offering a comprehensive Web CRM, Windows Client enhancements, and customization and administration improvements. Additionally, **this new release catapults Sage SalesLogix to the front of the pack of midmarket CRM vendors** with its highly differentiated features and capabilities such as powerful lead management; dynamic list building capabilities; server-side process automation; exceptional usability enhancements; and innovative uses of RESTful Web services and Web 2.0 technologies such as mashups, timeline visualizations, and sparkline charts.

This release **furtheres our differentiation in the area of deployment flexibility**—customers can access Sage SalesLogix Web, Windows, and Mobile clients while disconnected without sacrificing usability, customizations, or a rich user experience.

Sage SalesLogix v7.5 is a major deliverable for our stated strategy of streamlining IT efficiencies and lowering the total cost of ownership for customers. In many cases, Sage SalesLogix v7.2 (and later) customizations can be migrated to the Web Client with ease. Codeless quick forms make it quick and easy for developers and business analysts to tailor Sage SalesLogix to address their unique business needs. And, Web Services enhancements, including the adoption of RESTful interfaces, bring us closer to our product strategy of interoperability between Sage CRM products.

The enhancements in this release also help us address key findings from the Win/Loss Research Study conducted in February, 2008. Research results indicated we are losing deals to competitors due to weaknesses in features and attributes such as: lead management, workflow and process automation, usability, and Web access capabilities. By addressing all of these deficient areas, as well as including innovative features, such as the ability to create mashups, **Sage SalesLogix significantly strengthens its positioning in the CRM marketplace.**



## Release Highlights

Audience: prospects and customers | Projected Release Date<sup>1</sup>: September, 2008

### Experience the Benefits of a Comprehensive Web CRM

Sage SalesLogix v7.5 delivers a comprehensive Web CRM experience such as interactive list-building capabilities using filters; extensive lead management capabilities; significant customer service and support functionality; the ability to create sales orders; and usability enhancements that tremendously benefit the user experience. Innovative mashup capabilities and data visualization tools, such as timelines and sparkline charts, create a highly interactive and visual experience, enabling you to make informed decisions and facilitate more thoughtful conversations with customers and prospects. And, all of this functionality is available in a connected or disconnected Web environment—without sacrificing usability, customizations, or a rich user experience.

Sage SalesLogix v7.5 also offers powerful process automation capabilities that reach beyond the traditional boundaries of sales and contact process automation—enabling you to eliminate manual processes where it makes sense for your business. Additionally, with Sage SalesLogix v7.5, enhancements have been made to the Windows Client to streamline processes, including the ability to create activities for leads and attach documents to an activity. With Sage SalesLogix v7.5 your organization benefits from a robust CRM platform and industry-leading technology, regardless of whether you select a Windows or Web deployment and no matter how your users access data.

### Top Release Benefits

- **Comprehensive Web CRM:** Deploy a comprehensive CRM Web solution—including full sales, marketing, customer service and support functionality
- **Anytime, Anywhere Access to CRM data:** Access Sage SalesLogix data while connected or disconnected— without sacrificing usability, customizations, or a rich user experience
- **Efficient Lead Management Capabilities:** Access all the tools you need to effectively manage leads and work with them in a way that matches your unique business processes including the ability to perform lead de-duplication; assign activities to leads, perform group actions, and automatically route leads to the appropriate person or department
- **Powerful Process Orchestration Improves Productivity:** Eliminate manual processes where it makes sense for your business by automating key processes for any Entity in Sage SalesLogix
- **Rich experience through Modern Web 2.0 Technology:** Experience rich, concise, and useful views of data within Sage SalesLogix through REST, mashups, and sparkline charts
- **Usability Enhancements for Improved Ease-of-Use:** Increase user adoption with the modern, easy-to-navigate interface including features such as drag and drop tabs, multiple middle panes, expanded right-mouse button ability, and the ability to associate attachments to Activities

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<sup>1</sup> Release date subject to change.

# Sage SalesLogix v7.5 New Features

Note: Next to each new feature, we have indicated whether or not a feature will be a high market impact to installed base users using a 1-5 scale. 1= low, 3= brings Sage SalesLogix in line with competitors' offerings, 5=high impact.

## Sage SalesLogix v7.5 New Features

Description	Buyer Type
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### Comprehensive Web CRM—Connected or Disconnected

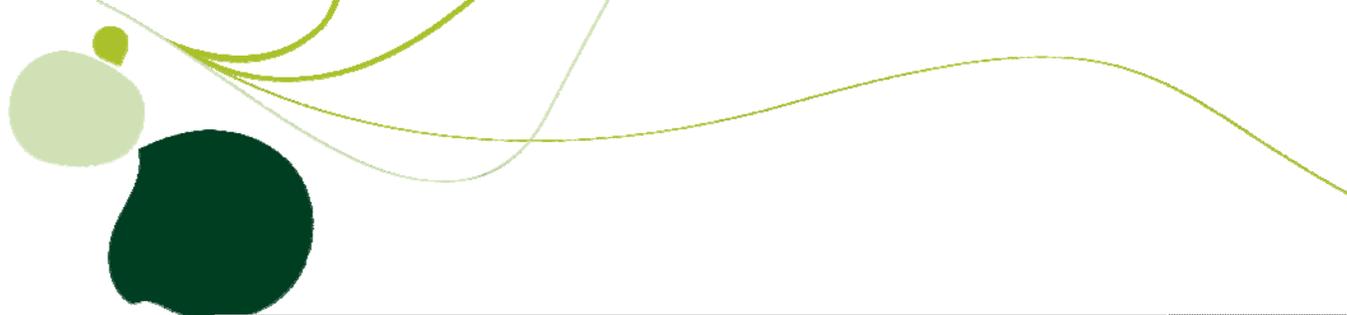
<p><b>Disconnected Web Client:</b> Sage SalesLogix v7.5 enables you to disconnect from the Internet when you need to and still continue working in the application, while benefiting from a rich user experience. <b>Market impact: 5</b></p> <p>Note: This feature is only available in the Web Client</p>	All Users
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<p><b>Customer Service/Support Enhancements:</b> As a customer service or support representative, now you have access to all of the tools necessary to enhance the customer service experience and increase your day-to-day efficiencies—via the Web. With access to defects management tools you can edit, search, manage, and delete Defects. Users can also create and manage Returns, Contracts, and Assets using the Web client.</p>	Customer Service/Support
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- Features include:**
- **Defects:** Customer service and support representatives can easily create and edit Defects, search for Defects, manage groups of Defects, delete Defects, and associate Defects with other items such as Attachments, Comments, Defect Tasks, Products, Returns, and Tickets—all within the Sage SalesLogix Web client. **Market impact: 4**
  - **Returns:** Create, assign, manage, and change the status of Returns as well as monitor returned assets and shipped assets via the Web. **Market impact: 4**
  - **Contracts:** Customer service and support representatives can manage, create, and activate contracts as well as monitor contract usage. **Market impact: 3**
  - **Assets:** Associate Assets with Accounts, Tickets, Defects, Contracts, or Returns so employees have all the details they need to better service customers. **Market impact: 4**

Note: Currently in Windows; new to Web

<p><b>Sales Orders:</b> Users can create new sales orders—from anywhere they have</p>	Sales, Customer
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Internet access. Users can modify or delete sales orders; allow more than one sales order for an opportunity; and indicate which sales orders are final.

Service

**Market impact: 3**

Note: Currently in Windows; new to Web

## Extensive Lead Management

**Import Leads:** A step-by-step wizard makes it easy for marketing professionals to import leads into Sage SalesLogix, perform lead de-duplication, and distribute leads automatically to individuals or teams. You can even perform group actions for leads, assign activities to leads, and create responses. The Lead Import Wizard is a powerful tool that streamlines marketing efficiencies and increases lead to sale conversion rates as qualified leads are distributed quickly to the appropriate teams. **Market impact: 5**

Sales/Marketing

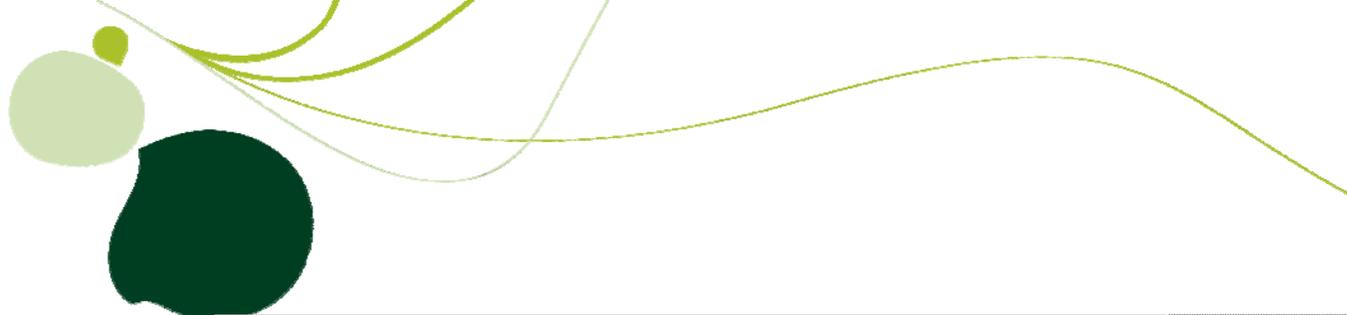
Note: This feature is only available in the Web Client.

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**Lead De-duplication:** With Sage SalesLogix v7.5, you can perform lead de-duplication upon import—not just when you’re converting them to an Opportunity—providing you with more flexibility. When you import new leads into Sage SalesLogix, they’re automatically de-duped against current Leads and Contacts to determine whether there are potential duplicates. Duplicates are automatically resolved for you by the system—eliminating the complex task of manual de-duplication. Duplications are saved to another location where they can be resolved at a later time. Performing lead-duplication is a vital part of the lead management process—ensuring clean data enters the system and so customers and prospects are not hit with the same campaign twice. **Market impact: 5**

Sales/Marketing

Note: This feature is only available in the Web Client. Lead de-duplication can be performed using the Windows Client, but only upon conversion to an Opportunity—not upon import.



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**Activity for Leads:** Sales and marketing teams can now log interactions and activities with Leads before they're converted to Contacts. You can make leads the subject of a meeting, phone call, or a to-do task; record notes; and more to ensure the appropriate action is taken—driving the lead closer to an opportunity or sale. **Market impact: 5 for install base**

Sales/Marketing

Note: This feature is new for both Windows and Web client.

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**Create a Response:** Since marketing processes vary by company and industry, Sage SalesLogix v7.5 provides organizations with more flexibility when importing and managing leads such as creating a Response for a lead, contact, or account. A Response is like a 'pre-opportunity'—a lead that might not be ready to be converted to an Opportunity or one that isn't associated with a campaign. Flagging a Lead as a Response reminds employees who open the record that the contact expressed interest in a product or service—ensuring a potential sale does not fall through the cracks. Whether a lead, contact, or account has responded to a campaign, clicked on your Web page, requested literature, or discussed a product or service with an employee, every instance of an expressed interest can be captured in Sage SalesLogix and pursued for future campaign and sales activities. **Market impact: 3**

Sales/Marketing

Note: Web-only for lead import.

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**Group Actions:** To streamline your marketing efforts, you can perform actions en masse to leads that you're importing such as adding notes, targets to a campaign, responses, and scheduling Activities. **Market impact: 3**

Sales/Marketing

Note: This feature is new for both Windows and Web client.

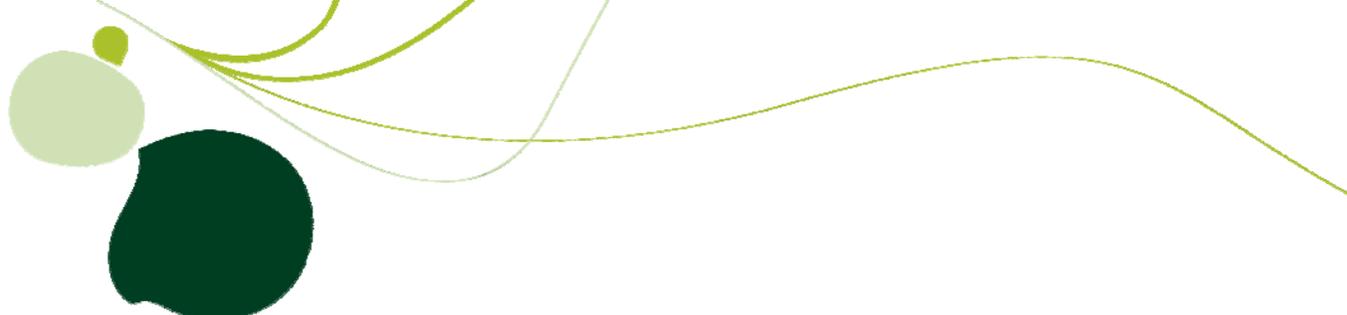
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**Automatic Lead Routing:** It's imperative that your hot leads are distributed immediately so sales opportunities are not missed. Sage SalesLogix flexible and powerful workflow and process automation abilities helps your organization to automate key processes, such as lead distribution, that work best for your business—enhancing productivity and increasing business performance. Out-of-the-box, Sage SalesLogix v7.5 provides you with a sample SDK lead routing process. Or, you can customize rules so Leads are automatically directed to individuals based on criteria you define—enhancing marketing efficiencies, eliminating manual processes, and increasing sales opportunities. **Market impact: 3**

Sales/Marketing

Note: This feature is new for both Windows and Web client.

## Simplified Access to Targeted Information



**Dynamic List Building:** Standard and customized Groups have been moved from the Menu Bar to the main content area and are now organized in tabs so you can toggle back and forth making it easier for you to find the information you need. Data filters appear adjacent to your Group lists making it quick and easy to identify relevant subsets of data. Once you've narrowed down a list, you can save it as an ad-hoc group and access it at a later period of time. This is a quick way to create a targeted list without using Group Builder or creating query. In List View, you can select multiple records at once to perform an action, significantly improving your productivity. And, all records are displayed in a single page, with convenient scrolling rather than having to page through records. **Market impact: 5**

All Users

Note: This feature is only available in the Web Client.

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**Summary View:** Currently you can view lists of data in Sage SalesLogix or drill down to a more detailed view of a single Account, Contact, Ticket, etc. This release offers a new Summary View in which you can view key information about an Account, Contact, etc. in a compressed viewing area—without having to drill down into the details. For instance, the Summary View for an Account shows address information, account owner, and more. Users can hover over data points for additional information or drill down for more information as needed. **Market impact: 5**

All Users

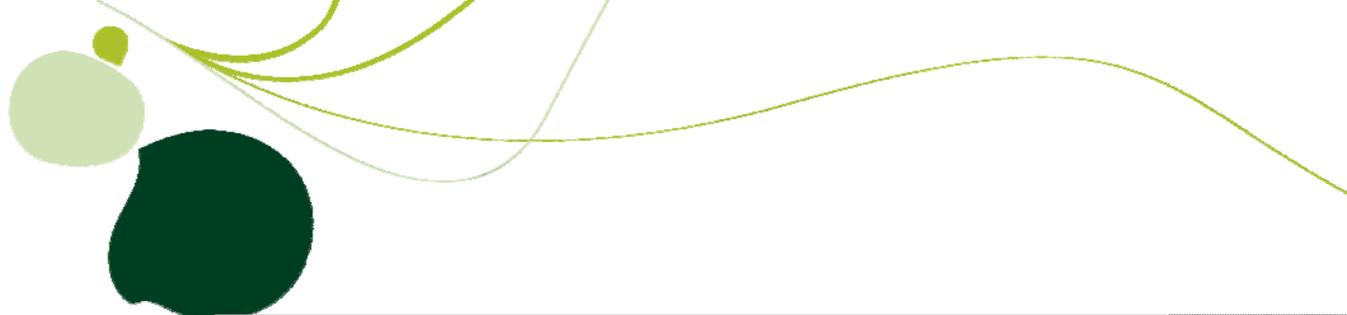
Note: This feature is only available in the Web Client.

### Usability Enhancements Deliver Improved Productivity

**Enhanced User Interface:** The layout of the Web interface has been redesigned to work more gracefully with your browser's ability to perform fluid resizing, and also to limit unnecessary scrolling. The header and toolbar have been streamlined for easier viewing of data and usability. A new title bar has been added so you know exactly where you are in the application, for instance, Accounts. The toolbar design has been updated to contain fewer items, and you can now expand and collapse the left navigation area to provide you with more space to view your data. **Market impact: 5**

All Users

Note: This feature is only available in the Web Client



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**Multi-tab Expansion:** Customize your workspace by adding as many middle panes as you need so you can view several tabs at one time—rather than toggling between them. **Market impact: 5**

All Users

Note: This feature is only available in the Web Client

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**Expanded Right-mouse Button Ability:** Now you can right-click in Tab areas and Lists to quickly get to more options and actions without have to go into the Toolbar drop-down menus. **Market impact: 4**

All Users

Note: This feature is only available in the Web Client

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**Attachment Improvements:** Sage SalesLogix v7.5 enables you to associate an attachment to meetings, phone calls, to-do items, e-mails, notes and personal activities. In addition, e-mail messages sent through Send SLX/Record to History can be opened in an e-mail editor so that the message is preserved exactly as it was sent—with the HTML links, attachments, images, etc. still embedded in the e-mail. This enables you to forward, reply to, and save e-mails as an attachment to another e-mail, or work with it like any other e-mail would be worked with. A single copy of an attachment will now be shared across all attachment records—conserving disk space. **Market impact: 4**

All Users

Note: This feature is new for both Windows and Web Clients

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**Enhanced Drag & Drop Tabs:** When moving tabs to customize your workspace, a visual indicator will let you know which tab you're moving and where—improving user adoption and reducing errors. **Market impact: 3**

All Users

Note: This feature is only available in the Web Client

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**Redesign of Lookup:** Lookup popups in the Web Client have been redesigned with enhanced power and flexibility so that whichever Lookup you're using, it will be similar in appearance, behavior, and functionality—for a better user experience and improved search capabilities. **Market impact: 3**

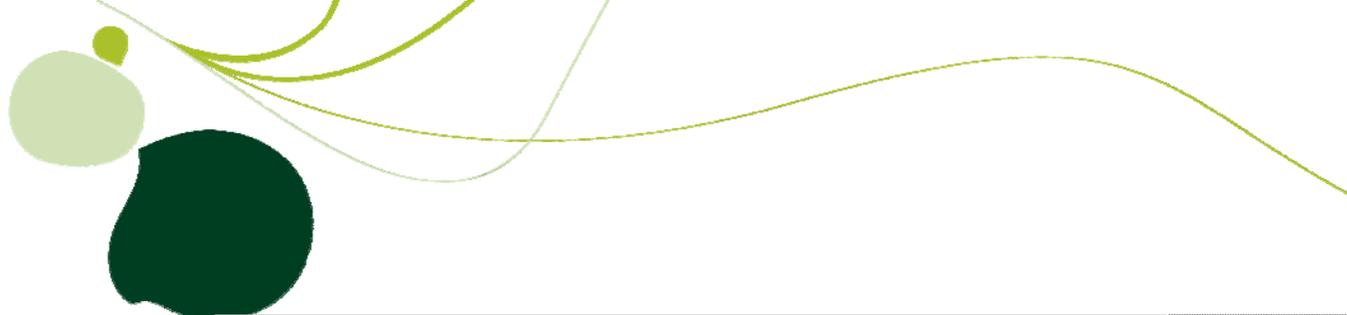
All Users

Note: This feature is only available in the Web Client

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**Expanded Synchronization Capabilities:** In addition to server-side synchronization, desktop synchronization is compatible with the Sage SalesLogix Web Client including the capability to synchronize activities, to-dos, calendar items, contacts, etc. The desktop synchronization option is on

All Users



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the new, modern Web-based architecture, de-coupled from the Windows Client, so it synchronizes when it needs to independent of the client. Synchronization transactions pass through the business logic layer maximizing continuity of how transactions are handled. **Market impact: 4**

Note: This feature is now available in the Web Client. The Windows Client already offers desktop and server-side synchronization.

### Rich Personalized Views of Information

**Mashups:** Mashups provide a means for users to create, modify, publish, and display collaborative compositions of internal and external data aggregated together and embedded anywhere within the SalesLogix client—providing a rich user experience to simplify data for viewing or analysis. It's easy to create mashups from external sources such as Google Maps, Hoovers, LinkedIn, Zillow, stock tickers, weather, ERP applications, etc. Since Sage SalesLogix is REST-based, you can mix internal Sage SalesLogix data with external data feeds. Creating Mashups within Sage SalesLogix provides employees with a rich and integrated user experience, plus they have access to critical customer and account information without having to leave the CRM application. **Market impact: 4**

All Users

Note: This feature is available in the Web Client only.

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**Timeline Visualization:** The timeline visualization feature provides users with a holistic view of an entity, such as an account, all in one place—so users don't have to look elsewhere in a customer record or the application to find more information. Out-of-the-box, timeline visualization appears in your Accounts and Tickets areas—providing a graphical representation of events over a period of time—past, present, and future. In the Account timeline you can view all Activities, Notes/History, Opportunities, and Tickets related to an account giving you a deeper understanding of trends, interactions, and key events over time. Within a Ticket, you can see Activities, Notes/History, and Ticket Activities—enabling you to better assess situations and adjust accordingly. Sage SalesLogix v7.5 provides two timeline features out-of-the-box embedded within Accounts and Tickets; however they can be created, customized, and embedded in most areas of the application. **Market impact: 4**

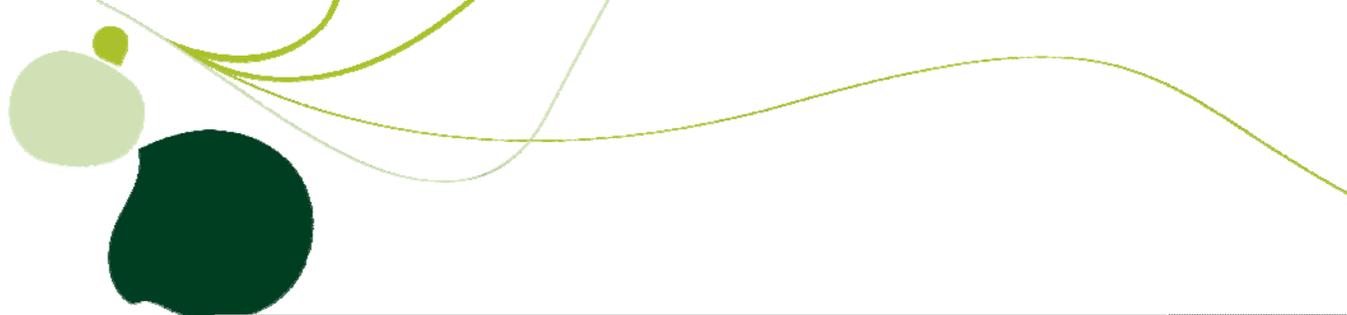
All Users

Note: This feature is available in the Web Client only.

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**Welcome Page:** A Welcome page was introduced in Sage SalesLogix v7.2.2 that featured components such as: Introducing Sage SalesLogix Web Client, Today's Activities, Recently Viewed, Quick Actions, Do You Know, and Links. The Sage SalesLogix v7.5 release significantly expands your ability to customize your Welcome page to match your unique preferences by adding, removing, and rearranging components. You can add new components such as My Recent Notes, Active Campaign Response Status, and My Closing

All Users



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Opportunities. You can even click on an area and drill down for more information. Administrators or Partners can create as many Welcome pages as needed—each with its own set of components associated with it. The Welcome page offers a quick, at-a-glance view of features you use the most—increasing your productivity. **Market impact: 3**

Note: This feature was introduced in v7.2.2, but significantly enhanced in v7.5 with additional content and the ability to personalize. This feature is available on the Web Client only.

## Customization, Administration, and Web 2.0 Technology

**Web Services:** Sage SalesLogix v7.5 provides the ability to expose an Entity or a business rule to a RESTful-based Web service—allowing you to integrate and enhance Sage SalesLogix data with data from outside the application. REST (Representational State Transfer) is a protocol that allows two applications to communicate with each other and to perform certain actions through URLs. For example, through a REST protocol, a Web service such as Google Maps can query data within Sage SalesLogix, and then combine the data with the data that it can provide. The adoption of open RESTful interfaces across our CRM product lines brings Sage SalesLogix closer to our product strategy of interoperability between the CRM products. **Market impact: 5**

IT/Partners

Note: This feature is available in Web Client and Windows Clients.

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**Form Controls:** Sage SalesLogix v7.5 provides two new controls including sparkline and image controls. Now you can embed images and sparkline charts within Sage SalesLogix—enabling you to customize the application to address your unique needs and providing users with a unique view of key data. Sparkline charts give users a “mini” graphical snapshot of data, such as stock performance. Image controls enable you to embed icons and other images within the application. **Market impact: 4**

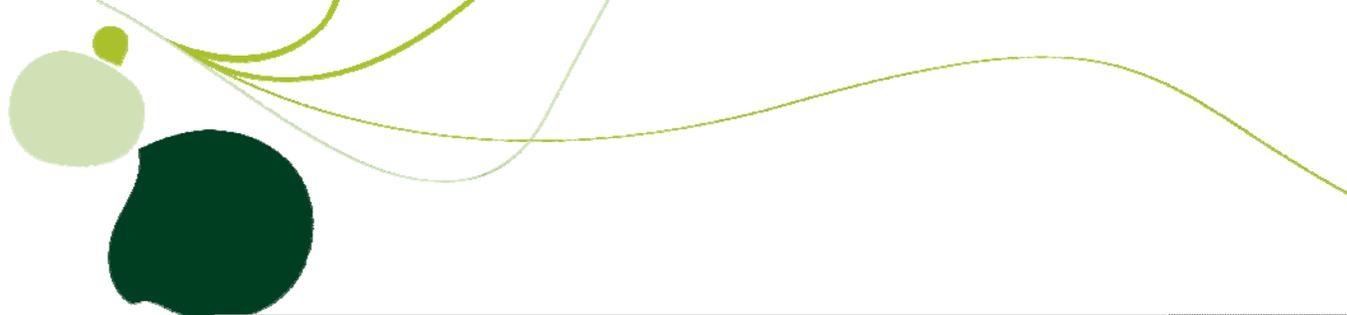
IT/Partners

Note: This feature is only available in the Web Client.

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**Application Architect Enhancements:** New enhancements to the Application Architect streamline deployment and administration of Sage SalesLogix including the ability to launch model entity wizards from the Application Toolbar; the ability to recognize which entities have been customized from the project explorer tree view; dockable data sources view; access to form control settings from new code snippet action; new portal creation wizard; workspace environment settings remembered for each project; and enhanced build output window. **Market impact: 4**

IT/Partners



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Note: This feature is only available in the Web Client

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**Process Orchestration:** Automate your proven sales processes or other important business processes to drive opportunities to a close and to increase team productivity. Sage SalesLogix offers powerful process automation capabilities that reach beyond the traditional boundaries of sales and contact process automation—enabling you to create or modify processes for any entity in the system such as an account, contact, opportunity, or ticket. You can build powerful single-step processes that can leverage sophisticated conditional policies to automate common activities, such as lead routing or service ticket capture and distribution. Or, create multi-step and multi-stage processes that can react to user interactions and suggest next steps. Sage SalesLogix v7.5 delivers SDK sample processes for sales process automation and lead routing out of the box; however you can customize any process to address unique industry or business needs. **Market impact: 3**

IT/Partners

Note: This feature is available in Web and Windows Clients. Functionality may vary by Client.

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