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Headline News

Sage CRM SalesLogix was ranked as a category leader in a recent Forrester Research's Wave report of leading providers of on-premise midmarket SFA solutions. Reviewers cited its customization and integration capabilities, and overall workflow-driven solution.

The report evaluated the strengths and weaknesses of the eight leading midmarket on-premise SFA products across 151 criteria.

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**Sage CRM
SalesLogix Mobile**

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for more info!

**Putting Your Time To Work
Sage CRM SalesLogix Time Management Tools**

Time may be the most valuable commodity in the world. Since we cannot buy more, we have to make the absolute best use of the time we have. Business tools that free up administrative time, allow us to be more efficient, or remind us about time-sensitive events enable us to make the best use of our time. Sage CRM SalesLogix includes several time management tools that help us make strategic and productive use of our valuable time. Let's learn how.

KnowledgeSync Alerts

Even the most involved manager or dedicated employee cannot keep track of everything. What will you miss and what will it cost you? Imagine a tireless assistant, one who never stops working, never asks for a raise, and who notifies you immediately of the events you care about. That tireless assistant is Sage CRM SalesLogix KnowledgeSync Alerts.

The concept behind KnowledgeSync Alerts is simple: generate an automatic alert message whenever certain criteria are met.

KnowledgeSync Alerts monitors the activity of your company, and will automatically notify you, your staff, your business partners, even your customers when important events take place.

KnowledgeSync Alerts will alert you to sig-

nificant events transpiring within your company's SalesLogix database, effectively offering proactive communication to enable you and your staff to avoid missed deadlines and to capitalize on opportunities. This state-of-the-art product is capable of sending alert messages via email, fax, page, cell phone, or Web browser—automatically.

Calendar And Activity Management

If all you need is a date book, there are plenty of options. However, most of us need a more sophisticated tool that helps keep us organized and efficient and can serve as the basis for managing lists, appointments, contact information, and opportunities.

Sage CRM SalesLogix is that sophisticated tool, offering complete integration between the Calendar function and your Accounts, Contacts, Activities, and Opportunities.

Since most of your appointments involve your contacts it makes sense that when you schedule an appointment, that activity is noted on your calendar and in your contact's record. Likewise with your To-do

list—complete an activity from within a contact record and it's checked off your main To-do list.

The Sage CRM SalesLogix Calendar presents a clean interface that offers daily, weekly, monthly, and yearly view of scheduled activities with

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Let the tools available with Sage CRM SalesLogix help you manage your time more effectively.

Compliments of:



**Atlantic
Software Alliance**

Time Management Tools CONTINUED

time and a brief description. Drilling down into the Calendar's Activities uncovers details such as type of activity, participants, location, and a more detailed description. You can arrange your Calendar to suit the way you work with different view, such as eliminating Saturday and Sunday from the Work Week view.

To-do lists offer a prioritized order of tasks, which can be tracked by contact, due date, start/end date, comments, activity, representative, and next action. The user can drill down for more detail by clicking on a line item.

You may schedule activities from anywhere within Sage CRM SalesLogix. Indicate the date and time, as well as the contact, account, and opportunity associated with the activity. If you schedule while accessing a contact or account, the contact and account information is filled in for you. You can indicate whether an alarm should be set to remind you of your activity, and if so, the lead time for the alarm.

The Sage CRM SalesLogix Activity Manager automatically tracks your Activities. It alerts you to overdue and new activities that you have yet to confirm. If any of your activities are overdue or in need of confirmation, the Activity Manager is displayed when you open Sage CRM SalesLogix. If an activity is overdue, you can postpone it to the next day by selecting a check box on the Activity Manager.

Group Scheduling

Scheduling for the rest of your team is easy; Sage CRM SalesLogix allows you to manage schedules and keep track of activities and events for multiple users.

Group Scheduling allows you to create a group of recipients and schedule an activity that will automatically appear in each group member's calendar. You can view the individual calendars of each group member as well as view a calendar of the group member's open dates making scheduling easier and less time consuming.

Outlook Integration

Sage CRM SalesLogix provides tight integration with Microsoft Outlook, delivering maximum efficiency for users already be familiar with this popular tool.

The most powerful part of this integration

is the **Send SLX** button appearing in Outlook when generating a new email. After creating an email message, clicking this one button sends the email and records the email to Sage CRM SalesLogix history. If the email you send includes attachments, you'll be promoted to keep a copy of the attachment in Sage CRM SalesLogix too, ensuring you have a complete history of your communications. When you want to associate an existing Outlook message to Sage CRM SalesLogix History, another button on the Outlook toolbar will record an email to History without responding to the message. Another easy way to record Outlook email messages to History is to simply drag and drop a message from Outlook into Sage CRM SalesLogix.


Your Sage CRM SalesLogix Address Book is available to you from within Outlook; when you click on the **TO** or **CC** buttons in an email, you can select the **Sage CRM SalesLogix Address Book** and choose from the list of Contacts.

Need to send a price list, corporate brochure, or another document stored in the Sage CRM SalesLogix Library? With two quick steps you can insert a file from the Library into an Outlook email message.

Find It Now!

The rapid resolution of customer service issues is of enormous value. There is the obvious time savings and the extra revenue produced by handling more calls each day. Equally important is the increase in goodwill and reputation you build among your client base when they can count on you not to waste their valuable time. Decrease resolution time and increase productivity and customer satisfaction with the **Speed-Search** feature in Sage CRM SalesLogix.

SpeedSearch is available throughout Sage CRM SalesLogix, integrated into the workflow. Enter a simple keyword or phrase and SpeedSearch queries its indices for results. A special Insert Results button will copy the text you select back to your open document. You also can open a ticket or other result document file right from the search view.

These are just a few of the tools and features designed to save Sage SalesLogix CRM users time. Call us with any questions. 

Headline News CONTINUED

Service Pack 3 Now Available

Sage CRM SalesLogix v6.2 Service Pack 3 is now available and well worth installing. With a focus on performance, Service Pack 3 also introduces a significantly improved Web Architecture without the loss of backwards compatibility.

Here's a quick look at the major enhancements included:

- ▶ Better Group performance with virtual paging of data
- ▶ More scalable and standardized Web architecture with improved performance while remaining backwards compatible
- ▶ Thin Web Client with smaller, optional ActiveX components
- ▶ Enhancements to Architect controls and tools including DataGrid, new Windows control, and preview of a new SLX Profiler utility

Call us for complete information and download instructions.


New Version Of Sage DynaLink

An updated version of DynaLink is now available. DynaLink provides integration between Sage CRM SalesLogix and back-office accounting and financial applications, including Sage MAS 500 ERP and Sage MAS 90 ERP. It provides organizations with a complete view of all customer interactions for making more insightful business decisions.

The new v2.2.4 Update for DynaLink offers support for two-way Sage MAS 500 Direct Order features and addresses several outstanding issues. Call us for full details of this update or for general information on the DynaLink product.

Version Retirement Dates

Sage Software is announcing the end of support for older versions of Sage CRM SalesLogix including versions 5.2, 6.0, and 6.1 over the next several months.

If you are running one of these versions, now is the time to begin planning for the transition to the latest version of Sage CRM SalesLogix. 

Protect Your System From The Malware Threat

Short for malicious software, malware is software specifically designed to damage or disrupt a system. The financial cost of a computer crash or security breach is enormous. It is estimated that half of all computer crashes are due to malware infiltrations—and more than 40 percent of companies will experience data loss due to a virus or other malware attack.

Malware typically finds its way onto your computers by stealth—but you may have unknowingly given explicit permission to download these damaging programs. Are you aware of the new dangers that exist? In this article we'll introduce you to some old and some new malware threats and offer some suggestions for protecting yourself.

Malware Comes In Many Forms

A whole new vocabulary has sprung up to describe malware. Here's a glossary to keep you current.

Viruses

Small programs that attach themselves to other programs or documents and then replicate, potentially causing significant damage.

Worms

Viruses specifically engineered to make extensive use of email and spread themselves rapidly. The difference between viruses and worms is that viruses hide inside the files of legitimate computer programs, while worms stand on their own.

Trojans

Trojans are programs that appear harmless but have a damaging or malicious effect. They are arguably the most dangerous kind of malware. Trojans rarely destroy computers or even files, they set their sites on bigger targets: your financial information, your computer's system resources, or a massive denial-of-service attack launched by causing thousands of computers to try to connect to a Web server at the same time.

Backdoors

This enemy of your computer sneaks past your security by opening a backdoor to the computer and providing network access for hacker or malware attacks.

Zombies

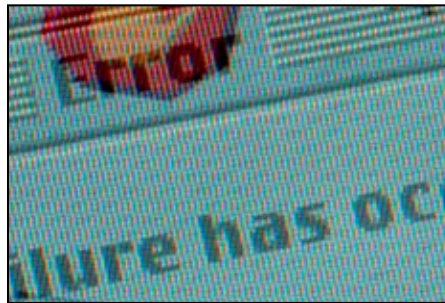
Zombies are programs that install themselves on computers and remain dormant until some external event triggers them into action.

Wabbits

Like a typical virus, Wabbits replicate themselves. However, this malware has no instruction to email itself or jump to another machine. It is completely content wreaking havoc with a single machine.

Exploits

Designed to attack and exploit a specific vulnerability, these evil programs keep Microsoft on its toes. Often times the updates Microsoft releases are trying to close the security hole targeted in a newly discovered exploit.



Take steps to protect your system from malicious attacks.

Rootkit

Here's one to avoid like the plague. Rootkits are typically installed by amateur hackers on other people's machines. Very difficult to detect and therefore remove, this type of malware often requires a complete reformatting of the hard drive to exorcise it.

Keyloggers

Keyloggers not only log the keys you press, but also capture screenshots to show the spy just what information you are working with. The results of the illicit keylogging are uploaded to the spy's Web site the next time you connect to the Internet.

Dialers

Dialers either dial expensive telephone numbers on your dime, or they dial a hacker's machine to transmit stolen data.

Spyware

We're all familiar with this term for a type of malware that spies on your Internet comings and goings in order to provide you with pop-up advertising or to provide the spy with a record of your activities.

Phishing

While not technically malware, phishing scams are on the increase. You may have received an email that appeared to come from your financial institution asking you to follow a hyperlink to their site to update your password, or account data. Following that hyperlink takes you to a site posing as your financial institution ready to steal your sensitive data.


URL Injectors

This malware inserts or injects a specific URL in place of the intended URLs you try to visit in your browser.

How Can I Protect My Information?

Common sense is a sound defense against many types of malware. Do not download files or programs from sites you do not know and trust. Read those licensing agreements; often times by indicating your acceptance of the agreement, you are authorizing the publisher to place cookies or tracking files on your computer. Antivirus software helps to protect your computers against viruses, be certain to keep it current. There are several low and even no-cost malware and phish-catching software options available. Here are just a few:

- ▶ Ad-Aware
- ▶ www.lavasoftusa.com
- ▶ Spybot Search & Destroy
- ▶ www.safer-networking.org/en/download
- ▶ SpyCop
- ▶ www.spycop.com
- ▶ Spy Sweeper
- ▶ www.webroot.com
- ▶ Netcraft
- ▶ www.netcraft.com

We can help you establish a comprehensive program to secure your company from the dangers of malware. Give us a call. 



Spotlight On Sage CRM SalesLogix: SalesLogix Mobile

You've grown accustomed to having phone numbers, calendars, notes, and other bits of information on your Pocket PC, but to be truly productive you need the power of Sage CRM SalesLogix on your handheld device. Unlike simple contact management programs for your handheld, Sage CRM SalesLogix Mobile (formerly SalesLogix for Pocket PC) goes far beyond basic look-ups of information, enabling you to take advantage of full contact, account, opportunity, and ticket management plus much more.

Clean User Interface

You may be familiar with some of the handheld versions of major software packages, and feel disappointed by the awkward, pieced-together look and feel. Sage CRM SalesLogix Mobile won't disappoint. It's an easily navigated Windows-based application that delivers instant access to the Sage CRM SalesLogix database. Users familiar with Sage CRM SalesLogix will have no trouble navigating the intuitive screens. And virtually all of the functionality you and your team need on a daily basis can be accessed from your Pocket PC.

As you enter notes or appointments, take advantage of the handwriting recognition feature with options familiar to Pocket PC users such as Block Recognizer, Keyboard, Letter Recognizer, and Transcriber.

Quick Access

Use a Pocket PC Phone? You'll be the model of efficiency using Sage CRM SalesLogix Mobile with its one-click dialing feature. From a contact record a single tap of your stylus dials the intended phone number.

Are you tired of lugging around that laptop, and waiting while it boots up just to check an appointment time or a client's address? Sage CRM SalesLogix Mobile puts that information directly into the palm of your hand, anytime, anywhere.

Rich Functionality

Sage CRM SalesLogix Mobile is rich with the features you and your team have come to rely on in Sage CRM SalesLogix. Here are some highlights:

- ▶ Create, search, sort, add, and update Sage CRM SalesLogix Account, Contact, Opportunity, and Activity records.
- ▶ Search, sort, and review Sage CRM SalesLogix Support Tickets.
- ▶ Access virtually any information available in the Sage CRM SalesLogix database, including custom fields.
- ▶ Customize forms to choose which columns to display.
- ▶ Sort by any column in ascending or descending order with one simple tap.
- ▶ Easily navigable tabbed user interface provides main, detail, and other Sage CRM SalesLogix views.
- ▶ Visual drag and drop calendar allows full Activity Management, including scheduling and completion of meetings, phone calls, to dos, and personal activities.
- ▶ Integration with Pocket Outlook.

Friendly Technology


With Sage CRM SalesLogix Mobile, your database can be stored in device memory or on optional secure digital (SD) or compact flash (CF)

memory cards for virtually unlimited data storage.

When WI-FI access is unavailable, users can still be productive. Sage CRM SalesLogix Mobile allows users to store data and forward that information later when a connection is available. Once that connection is available, either via wireless, dial up, or cradle, the synchronization process involves just a single step.

Your IT staff will appreciate that data and application feature enhancements are automatically pushed through to the handheld device during synchronization, saving the time and effort to manually update each device.

SalesLogix Mobile is built on the Microsoft .NET framework and SQL Server CE, which give it the customizability and scalability larger organizations require. Visual drag-and-drop design tools support the creation of efficient, industry-specific, or customer-specific workflow for mobile users.

Whether your team is in the office, on the road, or working from home, Sage CRM SalesLogix Mobile delivers unsurpassed efficiency. SalesLogix Mobile v4, with support for both Pocket PC and Blackberry will be available soon. Call us for full details and pricing. 



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