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**Headline News**

The *Software & Information Industry Association* (SIIA) has selected the SalesLogix® as a finalist in the **Best CRM Solution** category for its 20th annual **Codie Awards**. More than 1,000 entries across 63 categories were submitted for the 2005 awards. SIIA, which conducts the annual program, is the principal trade association for the software and digital content industries.

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**SalesLogix Sales Management Tools**

**A**s a sales manager, you are awarded much of the credit for your company's financial success, and much of the blame for any financial woes. With such responsibility, you can use a powerful tool working for you. A tool that allows you to record, monitor, manage, and analyze the full range of sales activities initiated by and engaged in by your sales team. That powerful tool is the SalesLogix® CRM solution. If you have not yet explored the many features of particular value to sales managers, read on.

**Opportunity Management**

Leads and opportunities generated by your company's marketing engine must be brought into the SalesLogix database so that they can be acted upon. The more quickly and accurately these leads make it into your database, the faster your team can make contact and begin the sales process. Of course each lead can be manually entered as they are received, but if your company purchases marketing lists, solicits leads from a Web site, or gathers leads at trade shows, you may want to consider a way to move these leads into your database without manual rekeying. A number of 3rd-party add-on tools exist for just this purpose, including **Scribe Migrate for SalesLogix**, and the two contact-importing solutions, **Web Response Grabber SLX** and **CardScan Pro**, that are featured on Page 3.

As sales manager it is your job to understand what opportunities are being pursued by your sales team. Answers to questions such as the pipeline makeup, lead status, the probability of close, and lead source must be readily available for you to be effective.

As your sales team creates and updates opportunities you can easily monitor the process using the **Opportunity Snapshot** and various reports and views. Within the SalesLogix solution you can automatically track leads from campaign, through the opportunity cycle, to close. Using **Opportunity Statistics**, you can view the Probability of Close, Products that are being considered, Lead Source, Status, and even the Competitors involved.

**Calendar Scheduling**

What is your team doing? Will they be in the office for the sales meeting you're planning next week? Don't overlook the importance of the integrated calendar and activity scheduling features that are part of the SalesLogix solution. You can

query each team member's calendar, schedule tasks and activities for any member, and generally monitor your team's activities.

**Business Alerts**

Busy sales managers should consider **SalesLogix Business Alerts**. Business Alerts can be configured to notify you when certain key events take place. For example, Business Alerts can send

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SalesLogix Sales Management tools help busy sales teams to be successful.

**Crystal Reports**

See page 4 for more info!

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## Sales Management Tools CONTINUED

you an email when an opportunity over a certain dollar amount is created, or when any opportunity is won or lost. You also can use Business Alerts to notify your sales representatives when they've been assigned a new account, or send them a reminder when there has been no activity on an account for a certain number of days. We've covered Business Alerts in detail in a previous edition of *\*info for SalesLogix*. If you'd like to learn more about this optional tool, give us a call.

### Sales Process Automation

It's easy for a company to say, "We've got a sales methodology," but just what does that mean? For most companies, the sales methodology consists of a list of the steps they expect salespeople to follow as they pursue an opportunity. The SalesLogix solution is both exceptionally powerful and extensively customizable and allows you to adapt its features to your sales process.

Your sales process defines the steps, stages, and assigned objectives your salespeople are expected to move opportunities through on the path to a sale. With the SalesLogix solution you can create custom processes based on product line, deal size, territory, or lead type and then automate sales activities and assign the objectives and results required at each stage.

You can configure a variety of sales processes to tailor your approach to leads from different sources, or those with a different initial level of interest. Each process can lead to multiple sub processes. In practice, you may continually fine tune these processes to match the reality of each situation. The benefit comes from your ability to manage, oversee, and influence what goes on during the sales cycle, making your team more effective and accountable.

For many companies the sales process changes every year or two, or in conjunction with a management change. Flexible SalesLogix software can adapt to changing processes, perhaps much more easily than your staff.

### Forecasting Sales

As a sales manager, your ability to accurately forecast revenue for upper management may be your single most important task.

In order to make accurate sales-related forecasts, you must have confidence in the data coming in from your sales team. With the Sales-

Logix solution, you have a number of attributes to study to allow you to make better, more accurate forecasts. Often it takes different views of the data to give you an idea of overall trends. You can segment opportunities by Account Manager, Region, Lead Source, or Probability of Close, and provide a clear picture of what's in the pipeline. Review the Average Days Open, the Close Probability, or the Weighted Sales Potential to extrapolate the most meaningful data for your analysis.

Instant, graphical, on-screen views of the data make quick queries a snap. You also can export the data to Excel or launch various opportunity reports on the spot.

### Marketing Campaign Analysis

While the development and execution of marketing campaigns may not be under your jurisdiction, you certainly need access to the results of those campaigns. How many leads have come in related to a campaign? How many sales have been made as a result?

SalesLogix CRM is designed to allow your company to collect detailed data concerning campaigns. You'll be able to analyze key campaign metrics, determining which ones work—and which do not. Armed with this information, you can better calculate what type of campaign and what level of marketing it takes to increase your sales numbers.

### Reporting

Timely, informative reporting is crucial to every sales manager. Nothing beats a hard copy of pertinent data for discussions with staff and the management team. The **Opportunities By Account Manager** report is an indispensable tool for analyzing each member of your team's workload. What is the status of those opportunities? Which ones are due to close this week? Which are in need of your intervention to make them move to the next stage?

Through SalesLogix reports you can easily analyze campaigns, review pipeline efficiency, consider revenue by lead source, and much more. The reports are clear, informative, and easy to use, offering you and your sales force instant access to revenue forecasts, trends, and other details they need to close more deals.

You have access to numerous standard reports and the ability to create a vast variety of

custom reports using Crystal Reports. Please see our article on page 4 for more about Crystal Reports.

### Competitor Tracking

In a tight market, you must focus on the strategies that allow you to beat the competition. How are you able to win against your competitors? What factors contribute to your losses? With SalesLogix CRM, you can arm your sales team with the tools they need to win more often.

You can record competitor product information as well as each competitor's strengths and weaknesses. Track the competitors' sales team members, sales strategies, and the reasons for each win and loss. Use Notes and record strategies that will give your team the edge, not just in the current opportunity, but for every future match up.

SalesLogix tools offer every sales manager what they need to keep their finger on the pulse of opportunities. Call us with your questions. ☆

## Headline News CONTINUED

### Best Software Is Sage Again

The Sage Group, plc (Sage) has announced that it intends to resume use of the Sage name and mark in North America. Some of you may remember that Sage adopted the Best Software name for its Canadian and U.S. operations in 2001, after a trademark dispute with an American company.

In connection with its resumption of use of the Sage name and mark, Best Software has acquired the rights to the Sage mark from the Dallas, Texas company who has owned those rights since the early 1990's. The change, Sage executives say, will enable Sage to better leverage its worldwide strengths. Sage is the global leader in delivering business management software for small and mid-sized businesses, with over 2.3 million customers worldwide.

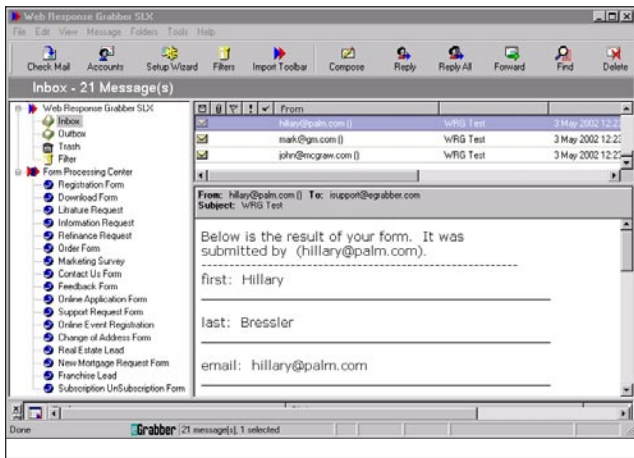
The Sage Group plans to fully adopt the Sage brand for its North American business by March 2006. ☆

# Add-On Solutions For SalesLogix CRM

Every company's sales cycle begins with a lead. Here are two third-party tools that help you import those leads into your SalesLogix® database.

## Web Response Grabber

Your corporate Web site serves as a valuable source of new leads. Prospects can view your product and service offerings at their leisure, and maybe even submit an electronic interest form. How do you ensure those leads are transferred swiftly and accurately into your SalesLogix database? **Web Response Grabber SLX** from eGrabber, Inc. can do this for you.



Web Response Grabber makes it simple to extract data from your Web site forms and bring it into your SalesLogix database.

### How Does It Work?

Web Response Grabber SLX helps you process email received from Web forms into your SalesLogix database. When a prospect submits a Web form, the form is received in your office as an email. As you receive that email, Web Response Grabber captures the information submitted, creates a new Account/Contact in the database, and assigns an Account Owner and Manager. It will even check for a duplicate record and if found, update it rather than adding a new Account/Contact.

With Web Response Grabber, there is no need for a dedicated Web server or Web license. The software resides on your desktop. You simply create a template in Web Response Grabber for each Web form. When the email is received from the Web site(s), Web Response Grabber understands how to read and interpret that email and transfer its contents into SalesLogix.

### What Can It Do For Me?

Web Response Grabber automates the Web lead capture process. It even attaches Processes and triggers Processes and Scripts, which can completely automate your lead follow-up. Once the email is processed, Web Response Grabber can send a customized mail merge email response to the prospect acknowledging their interest and letting them know you'll be responding to their request. It also can generate email alerts to send to the account owner and manager keeping your sales team in the know.

Even if the incoming lead does not come from your Web site, Web Response Grabber can handle it. Perhaps you receive leads from a partner's or other party's Web site. Web Response Grabber can automate the capture of lead data from any source.

Web Response Grabber helps you keep your database secure and safe. Your SalesLogix database is not connected to Internet. Instead, the lead information is delivered from the Web site as an email that is downloaded by Web Response Grabber at your office.

You save the time and effort of rekeying the data and eliminate the potential for data entry errors. Give us a call to learn more about Web Response Grabber SLX.

## CardScan Pro

You attended a trade show last week and collected hundreds of business cards—potential gems of opportunity. You want to start working those opportunities right away, recording the details of your contact attempts in your SalesLogix database. But first you have to manually enter the data from that stack of cards into your SalesLogix database. A daunting task. With CardScan Pro you can automate this time-consuming and tedious data entry task.

### What Is CardScan Pro?

CardScan Pro consists of a small, portable card scanner and the interface software that interprets the scanned data and synchronizes it with your SalesLogix database. New records are created or existing records are updated.

CardScan Pro is easy to use, with a highly intuitive user interface. It captures all the pertinent data, like direct and mobile phone numbers. The CardScan Pro is portable, and its plug-and-play USB connection makes it ideal for trade shows and travel.

With CardScan Pro, you can forgo the data entry task and scan those business cards directly into SalesLogix, capturing those leads faster and more accurately than ever before. You can capture contacts from trade shows, events, and large meetings while you're still at the event! This results in expedited follow up, and allows you to measure your traffic as it happens. Misspelled customer names, incomplete addresses, and missing email addresses can all be a thing of the past.

### How Do I Use It?

CardScan Pro is virtually plug and play; its operation couldn't be simpler.

- 1 Start the CardScan Pro application on your computer.
- 2 Put the business card in the CardScan Pro scanner. It will begin scanning automatically.
- 3 CardScan displays the data it scanned in a file card-style format allowing you to confirm the data you see, or make any necessary changes.
- 4 Press the CardScan *Pro Sync* button and select the *Synchronize* option to compare your new contact with the SalesLogix database. Existing records are synchronized, new records are added.

### More Than Business Cards

Using CardScan Pro's drag and drop interface, you can highlight and collect contact data from any electronic file, not just those scanned business cards. Gather contact information from Web sites or emails and drop it into CardScan Pro where it is separated and formatted into the appropriate data fields.

Leverage your investment in SalesLogix, while saving time and increasing efficiency. Call us for more details on CardScan Pro.

There are dozens of third-party products available to SalesLogix users, some addressing general issues like these two tools, and many targeting specific industries. Let us know if you'd like to learn more about them. ☆



## Spotlight On SalesLogix Crystal Reports

**T**imely, clear, and comprehensive reporting is crucial. **Crystal Reports** is an industry-standard graphic reporting and analysis tool, and is included with your SalesLogix® solution. Crystal Reports is a powerful, flexible, and practical tool that can result in immediate time-saving benefits, productivity increases, and first-class output. Crystal Reports version 8.5 began shipping with SalesLogix software Version 6.0. If you are not yet familiar with Crystal Reports, it is time to get friendly with this powerful, flexible report writer.

### Crystal Sets The Bar

Crystal Reports is a graphical WYSIWYG (What You See Is What You Get) report writer. It is easy to learn, easy to use, and amazingly powerful. By pairing Crystal Reports with your SalesLogix solution, you have access to an enormous set of powerful and flexible features and capabilities

### The Non-Standard Standard Tool

The dozens of SalesLogix reports included with the product were produced with Crystal Reports. What this means to you is that each of these standard reports can be modified to better suit your individual business needs.

In order to modify the reports, you need what is called a Designer License, as opposed to a simple Viewing License. SalesLogix ships with Crystal Reports Pro, and includes one Designer License and unlimited Viewing Licenses. To purchase additional Designer Licenses please give us a call.

### Creating Custom Reports Is Easy

Crystal Reports has a built-in tutor and an on-line help system to offer context-sensitive help and tips for successful report writing. Simply follow the detailed set of instructions and you will be well on your way. You can design interactive reports using an intuitive drag-and-drop interface. Experts and Wizards guide you through common tasks such as connecting to the data source, selecting fields and records, grouping, sorting, and formatting. Reports created with Experts and Wizards can be further customized using easy drag-and-drop operations.

### Infinite Reporting Flexibility

Crystal Reports includes over 160 built-in functions and operators as well as user-defined functions for complete control over report formatting, complex logic, and data selection. The powerful **Formula Workshop** lets you create valuable summary data that might not be present in your SalesLogix database.

Different users can view the same data in different ways without creating multiple reports. Users select from pre-defined parameters in a single report to receive their customized data. Sub reports may be embedded in a main report allowing you to insert information from different tables with different formats into any section of a report. You'll be able to customize the look of your reports by adding logos, pictures, shapes and colors, or simply changing the font. Choose from 12 types of graphs, add hyperlinks, drill downs, underlines, and running totals.

You can publish your reports to the Web with automatic HTML



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output, export the report to Microsoft Word or Excel, or email the reports in one of more than 15 file formats.

### What's New In Crystal 8.5

Version 8.5 adds a number of new features, including the ability to create Subtotals, Grand Totals, and Summary fields for hierarchical groups that give users with large data sets more flexibility. Crystal 8.5 allows you to export reports to PDF and XML formats to make sharing Crystal Reports with others even easier than before. In addition, Crystal Reports 8.5 allows you to copy entire report objects to the Windows clipboard to easily include them in other documents.

### Other Reporting Tools

Crystal Reports is not the only reporting and data access tool available to SalesLogix users. Non-technical users who want the ability to create their own reports also can use SalesLogix Pivot Reporter. Call us for details on this powerful ad hoc report writer.

### We're Here To Help

Crystal Reports is an extremely powerful, nearly limitless report writer. If you have questions about Crystal Reports, or are interested in specific training or report writing services, do not hesitate to give us a call. ☆

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