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SalesLogix Ranks High

SalesLogix® was recently named a **Top 100 Midmarket Product of the Year for 2005** by *VARBusiness Magazine*. The biweekly magazine solicited input from information-technology vendors and solution providers to arrive at the winners. Entries were considered and reviewed by *VARBusiness Magazine* editors.

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Sage SalesLogix Power Tools

For many users, Sage SalesLogix® is the primary application used during their workday. It is relied on for everything from calendar and email functions, to proposal generation, and the logging and tracking of customer service tickets. It stores vital, often mission-critical data. Three tools allow you to find this data and put it to maximum use: KnowledgeSync, Pivot Reporter, and SpeedSearch. Let's take a look at how these SalesLogix tools add both convenience and functionality.

KnowledgeSync

Wouldn't it be great to have a tireless assistant on staff—one who constantly monitored corporate activities as they transpired, and notified you immediately of the events you care most about? How about someone to print and distribute weekly, monthly, and quarterly reports? And an assistant who could read and route incoming email messages to the appropriate member of your team would be a tremendous time saver, wouldn't it? We all could use assistance like this—and SalesLogix KnowledgeSync provides this and more.

KnowledgeSync consists of four basic components: Alerts, Actions, Report Distribution, and E-mail Response.

Alerts monitors your database and sends alert messages when certain criteria are met. Ac-

tions allows you to create custom scripts that can carry out various actions within and outside of SalesLogix. The **Report Distribution** feature enables you to generate and distribute important reports or literature on any schedule you desire. **E-mail Response** scans and identifies incoming email, then automatically takes action based on the content or the sender of the message.

While SalesLogix KnowledgeSync is not a new product, it's now sold in three editions, allowing you to pick the configuration and features you need. Let's take a closer look at what each edi-

tion offers.

Alerts Edition

The **KnowledgeSync Alerts Edition** includes Alerts. Alerts in an automated alert system that can send an alert message via email, fax, page, cell phone, or PDA whenever certain criteria are met. Alerts monitors the activity

of your company, and will automatically notify you, your staff, your business partners, and/or your customers when important events take place. It will notify you to significant 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.

You can create new alerts or customize one of the many existing alerts to fit your company's

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KnowledgeSync, Pivot Reporter, and SpeedSearch maximize the use of your valuable data.

Exchange Link
See page 4 for more info!

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SalesLogix Power Tools CONTINUED

needs. Alerts can be both time and date sensitive and can be configured to include pertinent SalesLogix data, such as names and dates. Chances are your employees are already performing some of these tasks manually. Here are a few examples of how you can put KnowledgeSync Alerts Edition to work for you.

- ▶ Alert the Sales Manager to opportunities won and lost.
- ▶ Inform the Marketing VP of leads and one-to-one marketing opportunities.
- ▶ Email salespeople when there has been no activity on a prospect's account in a specified number of days.
- ▶ Send reminders to sales representatives to contact certain customers. For Example, in advance of a big trade show, to offer birthday greetings, etc.

Corporate Edition

The **KnowledgeSync Corporate Edition** provides the capabilities of the Alerts Edition and adds both **Actions** and **Report Generation**. Here are some examples of how to put the Corporate Edition to work for you.

- ▶ Conduct and analyze customer satisfaction surveys, and schedule appropriate follow-up activities.
- ▶ Generate and distribute Crystal Reports to your sales team at month end.
- ▶ Schedule a new activity in response to a change in a contact's status or close probability.

Enterprise Edition

The **KnowledgeSync Enterprise Edition** is the most comprehensive offering. In addition to the features of the Corporate Edition, the Enterprise Edition includes **Email Response**.

The Email Response component of KnowledgeSync helps prevent the loss of vital information contained in email messages sent and received by your company. You depend on email as a valuable link to staff, customers, and business partners. Your customers and prospects request information by filling out your Web response form. With the tremendous volume of email received by your company each day, chances are that some of it is mishandled, ignored, or ends up in the wrong hands. Email Response scans incoming email messages using a set of parameters you provide. It then takes

various actions, such as forwarding the mail, generating automatic responses, sending you an alert, generating a Crystal Report, creating records in your SalesLogix database, or scheduling new activities. The Enterprise Edition's Email Response can:

- ▶ Forward email messages to specific individuals depending upon the sender.
- ▶ Create or update a contact record in response to a Web site inquiry.
- ▶ Automatically reply to messages informing recipient of action taken, and record details of the communication within SalesLogix.
- ▶ Create a record in your SalesLogix database instantly as a customer initiates a request on your Web site.

Work Smarter With KnowledgeSync

KnowledgeSync allows your business to respond to rapidly changing business conditions 24 hours a day, 7 days a week. Give us a call to learn more about the three KnowledgeSync editions now available.

Pivot Reporter

As requests for information grow, your SalesLogix administrator may become overwhelmed with requests from product managers, marketing analysts, and sales and support representatives all wanting custom reports to support their operations. Wouldn't it be convenient if they each could get just the report they want—without involving your IT staff? With Pivot Reporter, they can.

Pivot Reporter is an intuitive, easy-to-use report writer with a rich feature set. It allows sales representatives, customer service representatives, sales managers, support managers, product managers, marketing and sales analysts, and senior management to quickly create reports using the information in your SalesLogix database. Every SalesLogix user in your company can create their own reports and share them with others.

Why Use Pivot Reporter?

SalesLogix offers the powerful Crystal Reports and SalesLogix Query Builder for reporting and data gathering, so why might you need Pivot Reporter? To make optimum use of Crystal, it is essential to understand the underlying data structure of SalesLogix and possess some de-

gree of expertise in SQL and relational databases. You must have the necessary knowledge to locate the tables that hold the data you're after and construct linkages between tables if you wish to draw together disparate data. Similarly, the SalesLogix Query Builder also requires that the user understand the SalesLogix database schema, and in many instances concepts such as inner and outer joins. Your SalesLogix administrator possesses this knowledge, but your sales and support staff may not. Crystal and the Query Builder are valuable and powerful tools, but they may be too complex for the average user who just wants to produce a quick report. With Pivot Reporter's ease of use and straightforward approach to report creation, even inexperienced users can create professional, informative reports.

Easy To Install And Learn

You can install Pivot Reporter in just a few minutes, without technical help. Instantly, 20 new informative reports are available to you. You will easily be able to modify these reports and save them as your own to use anytime. Creating new reports is simple using the included wizard that steps you through building a new report. Within minutes, you can create a pivot-style report that will draw the most current information from your SalesLogix database.

How Do I Create A New Report?

Create a new report simply by dragging and dropping fields from the Available Fields list into the report. The report view updates after you drag a field or change a caption, so you can see your changes impact your report. Include custom tables and fields, without the hassle of defining joins. Use filters and formulas to refine your report to your exact specifications.

Something For Everyone

Users at every level of your company can make effective use of Pivot Reporter.

For Sales Managers: Create pipeline reports grouped by Sales Representative and Team; incorporate "rolling months" forecasts to reflect the current month, the next month, and the month after; track the number of days required to close opportunities; track wins and losses; monitor the number of sales calls made by week, time-of-day, day-of-the-week, or month; and create sales charts for management

and board meetings.

For Sales Representatives—Monitor your sales pipeline, print the activity report to list scheduled calls or meetings, and generate Excel lists of customer contacts and prospect accounts.

For Marketing Analysts—Report on the number of times a lead source has been used; report on the status of marketing campaigns; create Excel lists of contact mailing information for generating mailing labels; track sales activities by region, sales team, or representative; and report on lead source and campaign reference information.

For Product Managers—Measure sales by product family or product group, determine what products are in the pipeline, discover reasons opportunities are won or lost.

For Support Managers—Track the number of tickets opened by time of day, day of the week, day of the month, week, quarter, or year; and create reports to reflect the Area/Category/Issue of closed tickets.

For SalesLogix Administrators—Print information in the SalesLogix reference tables such as User Profiles, Team Profiles (including team members), Lead Sources, Products, and Campaigns; generate a report listing custom

SalesLogix tables and fields; and find users who have synchronized recently.

Pivot Reporter puts reporting power in the hands of every user. Let us know if you have questions about Pivot Reporter.

SpeedSearch

A sure way to increase customer satisfaction and productivity is to find and deliver answers quickly. One of the best tools for finding those answers quickly is **SpeedSearch**.

Now SpeedSearch is available throughout SalesLogix, for Sales, Marketing, Service, and Support users. It's capabilities are integrated into the workflow to enable you to find answers anywhere.

How Does It Work?

Enter a simple keyword or phrase and SpeedSearch queries its indexes for results. You can choose which indexes to search, selecting from attachments, defects, documents, standard problems, tickets, even files on the local network or PC. An **Advanced Keyword Search** function provides choices such as *Sounds Like* and *Thesaurus*, enabling you to find otherwise missed results. Try filtering your results by asking for results created

or updated within a specified number of days, or only results frequently used.

Using Your Results

If searching from within a ticket, a special **Insert Results** button will copy the selected text back into the open ticket. As your representatives uncover a successful new resolution, they can submit the ticket resolution or defect for inclusion in SpeedSearch.

Easy To Use

SpeedSearch is an easy-to-use, flexible, and powerful search engine that effectively unlocks your data, making valuable troubleshooting tools available to your representatives. A lot of time and effort goes into accumulating your company data, be certain you can find it when you need it. Please give us a call to learn more about what SpeedSearch can do for you.

Your Tools Of The Trade

KnowledgeSync, **Pivot Reporter**, and **SpeedSearch**—three powerful tools that maximize the value of SalesLogix. Each provides quick, meaningful, and convenient use of your SalesLogix database. Please give us a call to learn more about any of these tools. ☆

News You Need To Know

New Releases On The Way

Service Pack 3 will focus on performance and includes several Web updates designed to provide a more scalable CRM architecture and a Thin Client User Interface. SP3 will include a Web thin-client (Active-X optional), enhanced Web performance, and Group performance.

Following closely on the heels of SP3, is a **Marketing Feature Pack**. Sage Software tells us this will include enhanced Marketing capabilities designed to help you manage multi-faceted direct and e-mail marketing campaigns. New features will help you define and segment target audiences, capture and import leads, track prospects separately from customer accounts and easily product ROI reports to guide resource allocation and future marketing expenditures."

We'll keep you posted on these new releases as more details become available.

Concurrent User Licensing Changes

Now Sage SalesLogix® offers Concurrent User

Licensing to all users in all interfaces: Sales, Marketing, Service, and Support under both Windows and Web. This means you now have a less expensive way to give additional users access to SalesLogix.

Rather than purchasing named user licenses for casual users, purchase a few concurrent user licenses to allow anyone who needs access but whose use doesn't warrant a full named user license.

SalesLogix has offered concurrent licensing before, but only to the Support client user. Now this cost-efficient licensing option is available to everyone. If you own Sales, Marketing, and Support—a concurrent user license will grant users access to all of these applications (within your security setup).

Concurrent User Licenses expand access and are perfect for departments with multiple shifts.

Call us for pricing and details. ☆

Headline News

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SalesLogix Ranks High continued

The editors selected only 100 of the more than 400 nominated products.

More Honors

SalesLogix® was chosen by ISM Inc., a CRM strategic advisory organization, as a **Top 15 CRM Small & Medium Business Software Award** winner for 2005. This is the seventh straight year that SalesLogix has received an ISM award.

The winners were chosen after intensive testing by the ISM Software Lab at its Bethesda, Md.-based headquarters. Each product tested during ISM's evaluation program was rated according to 211 selection criteria, including 109 business functions, 49 technical features, 36 implementation capabilities, and 17 user-support features. ☆



Spotlight On SalesLogix SalesLogix Exchange Link

Sage Software is planning exciting new functionality for Sage SalesLogix® called **SalesLogix Exchange Link**. This product allows **server-side** communication between SalesLogix and the Microsoft Exchange Server; great news for companies utilizing or planning to utilize Microsoft Exchange Server. In this article we explain what SalesLogix Exchange Link is and how it can benefit your company.

About Microsoft Exchange Server

Microsoft Exchange Server is software that runs on servers and enables you to send and receive electronic mail and other forms of interactive communication through computer networks.

SalesLogix Exchange Link

SalesLogix Exchange Link provides server-side linking and synchronization of contacts and calendars between SalesLogix and Microsoft Exchange Server. To the user, this process is invisible. SalesLogix Exchange Link runs as a Windows service on an existing SalesLogix Server with minimal processing impact. The product uses a concept of multiple link jobs. Each job links a set of SalesLogix Contact, Calendar Activities, or To-Dos in SalesLogix to a folder in Exchange. This serves to minimize the processing and load on both the SalesLogix Server and the Exchange Server, thereby improving system performance. This server-side integration fully supports both the SalesLogix Windows and the Web Clients.

Benefits Of SalesLogix Exchange Link

The benefits of SalesLogix Exchange Link are clear—improved system performance and data integrity. Now your network or SalesLogix administrator can control the synchronization process. Link jobs and changes are logged for complete system monitoring. Overall administration is consistent and straightforward, and data integrity is protected. Where it's appropriate to have a separate or unique set of synchronization rules, it's possible to override the server-side rules on a client basis. SalesLogix Exchange Link provides both options.

Easy To Configure

During the initial configuration, you will specify synchronization frequency and rules. For Contacts, you can define Link rules by user, team, or for all Contacts. Define link rules for Calendar on a user-by-user basis. Conflicts and duplicates occurring between Microsoft Exchange and SalesLogix are resolved using the Link rules you set up. You can also set rules to preserve SalesLogix information when an Microsoft Exchange Contact is deleted. The SalesLogix Exchange Link can be stopped and started manually, or it can be run as a service when Windows starts.

Easy To Install

There is no software or reconfiguration required on the Exchange Server. The Exchange Server does not even need to be restarted to connect the Exchange Link. All software is loaded on the SalesLogix Server (or additional server), and can be completed in just a few minutes.

Establishing a link from SalesLogix to Exchange requires administrative rights to SalesLogix, the SalesLogix database, and Exchange Serv-



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er. When the Link is established, the product will automatically configure the SalesLogix database for use with the SalesLogix Exchange Link.

Compatibility

SalesLogix Exchange Link requires that you be running Microsoft Exchange Server 2000 or 2003. You must also be using Microsoft SQL Server as the SalesLogix host database; Oracle is not supported at this time.

Impact On Outlook Integration?

SalesLogix Exchange Link is compatible with Advanced Outlook Integration but the Intellisync portion with current Outlook Integration is redundant, and may have a performance impact. To maximize your performance, we can provide complete Outlook Integration assistance for your environment.

Available Soon

SalesLogix Exchange Link is in Release Candidate now, with release expected by late summer 2005. If your company is or will be running Microsoft Exchange Server, this product is worth looking into. Call us for complete details and pricing. ☆

contact