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Headline News

Sage Software's annual customer conference, Sage Summit will be held November 5-8, 2006 at the Gaylord Opryland in Nashville. Here you can connect with fellow software users, product developers, support analysts, and product leadership—all under one roof. You'll be able to talk to the software publishers and learn what's ahead for Sage CRM SalesLogix. Call us for more details, or visit www.sagesummit.com to register.

What's New In Sage CRM SalesLogix v7

Sage CRM SalesLogix v7 is scheduled for release this summer. In this article we'll take a look at the planned feature and architecture changes in this release.

Integrated Service And Support

With the release of v7, the Sage CRM SalesLogix Support is now part of the Windows Client. With the release of v7, it is no longer a separate Support Client. The Support features are combined with the Customer Service features to deliver an integrated service and support solution. We will feature the new integrated Sage CRM SalesLogix Service and Support solution in an upcoming issue, this article will focus on just the new features added in v7.

The Support features now included in the Sage CRM SalesLogix client include: **Assets, Service Contracts, Returns, Standard Problem Resolution, and Defects.**

When you sell products they become assets to your customer. In v7, you can specify which Assets are included in a Service Contract and then view those assets by Account. Now you can track detailed Asset information, including serial number, quantity, and the sales order number. You can associate those Assets with Accounts,

Tickets, Defects, Contracts, or Returns. This gives you full visibility into the products you sell across their entire lifecycle.

When a customer needs to make a return, Sage CRM SalesLogix v7 further streamlines the process. Throughout the process, you can monitor all details of the Return, including the issue of an RMA number, and associate those Returns with an Account or Ticket.

Standard Problem Resolution provides a quick way to respond to common customer questions. Add common problems and associated resolutions to the searchable database.

You now can track additional Defect details including problem type, version found, and source. Expanded Defect tracking functionality means that you can track issues that relate to a particular product you sell. You can use this

information to improve your product and customer service. You can associate Defects with Accounts, Service Tickets, Returns, and Assets for a truly comprehensive tracking system.

With a single click you can export your Returns and Defect lists to the Excel to perform further analysis.



The customer service and support functions are combined in Sage CRM SalesLogix v7.

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FREE Webinars
See page 4 for more info!

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What's New In Version 7 CONTINUED

Dashboards Drive Productivity

Sage CRM SalesLogix v7 introduces interactive dashboards that may completely change the way you use Sage CRM SalesLogix.

The Dashboard is a highly visual, highly configurable, real-time information portal. With the Dashboard, you can view performance metrics, diagnose key issues, and identify opportunities—all from a single screen. You choose the data important to you from an extensive list of content to display. Choose top customers and opportunities for example, combined with the pipeline status, open opportunities, and the current win rate. With real-time information at your fingertips, you can more easily discover the causes of any performance issues and take action.

Perform quick analysis by simply changing the filter or group criteria. When you need the details behind the data displayed, the Dashboard offers drill-down capabilities to uncover the facts you need. Plus, you can easily export your data to Excel for further analysis.

The Dashboard not only shows you the numbers, but effectively uses charts and graphs to display the data in an easy-to-understand format. Navigation is intuitive and straightforward; you simply use your mouse to click on hyperlinked data to discover more details through handy drill-down tools.

Think of the Dashboard as a snapshot of vital customer, prospect, sales, and support data, available for viewing immediately, in a colorful, graphic format. It offers the crucial data needed to make timely business decisions and empower employees to operate with a higher level of efficiency.

The Dashboard is designed to remain open on the desktop and provide a current and concise look at the information most important to each user.

Enhanced Marketing

Sage Software made the enhanced marketing feature set that is now part of v7 available to users late last year. Let's take another look.

The marketing enhancements are intended to help you refine and target your company's marketing message to the appropriate subsets of customers and prospects. You now are able to distinguish between customers and prospects to align your marketing efforts appropriately for each.

Lead capturing and import functionality makes it easy to bring leads from Web forms, tradeshows, seminars, or purchased lists into your



The Dashboard gives you all the information you need together in one handy location.

Sage CRM SalesLogix database and to track those leads at every stage. A quick click will convert your qualified leads to new sales opportunities.

Email marketing is easier and more feature rich in v7. You can execute email campaigns using the Mail Merge or use the integrated marketing service provider EmPulse. Design company email templates within EmPulse and then upload your target lists directly into EmPulse for distribution. Response data from your campaigns is transferred automatically into Sage CRM SalesLogix.

The marketing features included with v7 are significant, and we have only space for a brief overview here. Please call us for full details.

Productivity Enhancements

The first thing you will notice is support of XP themes for consistent look and feel across all applications.

From the Edit menu, a new **Copy Link to Clipboard** option is available allowing you to copy and paste links of any Sage CRM Sales-

Logix Contact or Opportunity into an email. The email recipient, with proper security access, then can simply click on the link to open that Contact or Opportunity.

You'll appreciate the ability to manage all **Activity Reminders** and **Alarms** through a single interface.

The Outlook integration is improved; now **Activity Confirmations** and your calendar will update automatically, without the need to refresh. You can view and confirm Activities from the Calendar view, which is updated to a more familiar Outlook style.

When a Contact moves to a new account, or was created under the wrong account, you can move the entire Contact record to the new or correct account.

Mobile CRM

Full-featured CRM on your handheld device is delivered with v7. Use either your Pocket PC or Blackberry device and access the data you need from anywhere.

Call us for more details on the functionality of Mobile CRM.

Discontinued Features

Along with the dozens of new features in v7, there are a few discontinued or obsolete functions.

Due to the integrated service and support functionality, the Sage CRM SalesLogix Support Client is no longer available and will not operate with Sage CRM SalesLogix v7. Similarly, Support Procedures and the Notification Manager have been discontinued and are no longer available. Ticket and Defect notifications are still available at the Account level. If you need additional alerts and notifications, they are available with Sage Knowledgesync. Call us for details.

Crystal Enterprise 8 is no longer utilized for Web Reporting. Instead, a **Crystal Reports XI Embedded Server** will be used. The Embedded Server supports several reporting users at a time. An upgrade is available to support more concurrent users. Call us for details.

We've just touched on the new features included in this significant release. Please call us with your questions. ★

Are You Outgrowing Your Contact Management Software?

A successful business grows and changes with the times. Perhaps you have been using ACT! by Sage, Goldmine, or another contact management solution, but now need customer relationship management capabilities to support your growth. As your sales force grows, opportunity management and forecasting become important, as does the ability to automate many marketing functions. As your client base grows, a service and support solution is important to better manage customer expectations. Customer Relationship Management (CRM) software can bring these capabilities to your organization, allowing you to build a cohesive and comprehensive database of all your customer interactions.

Sage CRM SalesLogix is an award-winning Customer Relationship Management solution from Sage Software. It builds on the features and ease-of-use of ACT! to provide you with the added functionality you need to acquire, maintain, and support profitable customer relationships. Below we've assembled some of the significant benefits Sage CRM SalesLogix offers.

Centralized Database

A centralized database provides a single location where your local and remote employees can view and update customer information. Sage CRM SalesLogix provides that centralized database, holding a complete record of your customer interactions, from marketing and sales to service and support. Every employee with customer contact can have an up-to-date view of the customers, enabling him or her to deliver an exceptional customer experience.

Marketing Automation

In any economy, it makes sense to put your marketing budget to the best use possible. Sage CRM SalesLogix provides robust marketing automation tools that allow you to target customers and prospects, automate campaign activity scheduling and follow-up activities, and track response rates. You can set up workflow processes to ensure each lead is worked. It's easy to tie revenues to specific campaigns for comprehensive ROI analysis.

Launch targeted email marketing campaigns from within the software—you'll be able to monitor statistics such as open rates and click-throughs to help you fine tune future campaigns.

Strong Sales Engine

Sage CRM SalesLogix delivers the tools and resources that allow you to effectively manage all aspects of your organization's sales cycle, from opportunity to close. Automate activities such as calls, letters, and literature fulfillment based on processes you define.



Are you finding it difficult to find customer or contact information with your current system? Maybe it's time to consider Sage CRM SalesLogix.

Customization Capabilities

Many contact management solutions allow you to relabel fields and perform other minor customizations. However, if you've outgrown those limited customization capabilities and find you need to tailor the software to suit specific business processes, Sage CRM SalesLogix may be your solution.

Sage CRM SalesLogix provides extensive customization capabilities. You can expand and customize data tables and other areas of the application globally to meet your business needs. You can create entirely new screens and data tables that allow you to mold the software to address specific business needs.

Forecasting And Reporting

Accurate forecasting enables sales managers to see the impact of competitors, lead sources,

various industries, product lines, and many other variables on the sales pipeline. As a result, you can better align expenses with revenue growth.

Sage CRM SalesLogix provides comprehensive forecasting tools that deliver the information you need to make those strategic decisions. Using queries and filters, managers can quickly select the information important to them and view it in a variety of chart formats. You can analyze revenue potential by region, territory, salesperson, product, and more.

Integration With Accounting And Third-Party Products

Integration with existing legacy databases, accounting applications, and other company-wide business management solutions is critical for many organizations.

Sage CRM SalesLogix supports integration to the products your organization uses every day, providing management with a comprehensive view of operations and staff with an efficient workflow.

Service And Support Solutions

Providing exceptional customer service helps you build loyal and lasting customer relationships. With Sage CRM SalesLogix, you can track and resolve customer questions, issues, and technical support inquiries for a high-quality customer experience.

In addition, Web Customer Portals empower customers to find the answers they need by allowing them to view, add, or edit service and support tickets.

You can track returns and defects and build a comprehensive knowledge base of resolutions to commonly asked customer questions.

Sage CRM SalesLogix offers significant benefits to growing, dynamic businesses. We'd be pleased to help you determine if Sage CRM SalesLogix might be the right solution for your organization — please give us a call. ★

More Info

Click here for more information on products and services featured

Welcome New Atlantic Software Alliance Customers!

We would like to welcome the following 2006 new customers to the Atlantic Software Alliance family!

Sage BusinessWorks

- ▶ Stockton Infrared Thermographic Services, Inc.

Sage MAS 90 and Sage MAS 200

- ▶ Keller Building Products Inc.
- ▶ National Tour Inc.
- ▶ Golden AGI
- ▶ Barefoot & Company (Upgrade from Sage MAS 90 to Sage MAS 200)

Sage MAS 500

- ▶ Medical Modalities

Join us for these **FREE** webinars to learn more about what Sage CRM SalesLogix can do for you! If these dates conflict with your schedule, please email us at rick.moore@asateam.com and let us know which webinar you are interested in and we will work with you to set it up!

For more information on Sage CRM SalesLogix, please contact us at rick.moore@asateam.com or at (704) 290-5437.

Sage CRM SalesLogix for Marketing—9/15/06 | 10:00 a.m.–11:00 a.m.

We know it's critical to put your company's marketing resources to their best use. That's why Sage CRM SalesLogix for Marketing can help you execute effective, timely marketing campaigns across all of your sales channels. In this webinar, learn how you can:

- ▶ Manage marketing campaigns and marketing materials
- ▶ Identify and target your market segments
- ▶ View your marketing campaign results
- ▶ Manage your lists and addresses
- ▶ Ensure a consistent corporate image

Sage CRM SalesLogix for Customer Service—10/20/06 | 10:00 a.m.–11:00 a.m.

How do you record, track and resolve customer issues? By giving your customer-facing employees access to vital information, you'll be able to increase customer loyalty and satisfaction and keep them coming back for more. In this webinar, learn how Sage CRM SalesLogix for Customer Service will give you the ability to:

- ▶ Access and share information for customer questions or issues on billing, support, shipping, cross-selling and more
- ▶ Improve customer service
- ▶ Improve team communications
- ▶ Integrate with sales and accounting

Sage CRM SalesLogix for Management—11/17/06 | 10:00 a.m.–11:00 a.m.

Imagine having powerful sales automation and management tools to maximize your company's sales performance. With Sage CRM SalesLogix for Management, you will have the resources you need to effectively manage all aspects of the sales cycle and increase sales team performance. In this webinar, learn how Sage CRM SalesLogix for Management will enable you to:

- ▶ Increase sales visibility
- ▶ Create more selling time
- ▶ Effectively manage your sales representatives
- ▶ Increase profitability
- ▶ Integrate with sales and accounting
- ▶ Reduce customer turnover

Sage CRM

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2006 Sage CRM SalesLogix Summer Promotion

Buy four concurrent licenses and get a fifth license for FREE!

Are you playing "musical chairs" with your software licenses and your staff? If so, then you are a prime candidate for Sage CRM SalesLogix concurrent licenses. It can improve your sales operation with greater flexibility than ever before. It's hard to argue against a deal that makes business run more efficiently, for less money.

Don't delay, this offer is valid only until September 29, 2006!