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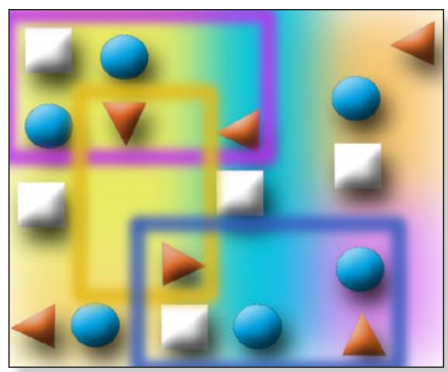
For SalesLogix®

Volume 2
Issue 2
May 2004

Get Organized With SalesLogix Groups

It's human nature to classify things. Grouping similar items together and labeling them gives order and efficiency to our lives. Categorizing makes a large amount of data manageable. What if you had to look through every single name in your address book to find your neighbor Mr. Jones' phone number? Or what if you wanted to find all your neighbors, or just those folks to whom you sent a Christmas card? Most methods of categorization only allow a member to be part of a single group, requiring you to maintain a separate database for each desired view of your data.

SalesLogix **Groups** bring broad flexibility and functionality to the product—providing unlimited options for collecting and categorizing the data you care about. Groups allow you to look at your SalesLogix database in a variety of ways by extracting and assembling your data in custom views. If you are not taking full advantage of groups, read on, as we share some standard and also some less common uses for them.



Groups allow you to look at your SalesLogix data based on criteria you select..

What Are SalesLogix Groups?

SalesLogix Groups are collections of accounts, contacts, or opportunities sharing a specific condition or characteristic. The groups may be static, always containing the same group of members, or dynamic—changing members depending upon the conditions you place on group membership.

Groups are a helpful way to efficiently manage your workflow. You can use groups to work with a subset of your accounts, contacts, or opportunities. Use groups to select data to print on reports; launch a campaign targeted at a group; and to send mailings, emails, and faxes using the mail merge feature. A single account, contact, or opportunity can be a member of multiple groups.

Two Group Types

SalesLogix supports two types of groups: **Standard Groups** (typically referred to just as groups), and **Ad Hoc Groups.**

Normally, you create a group based on a specific set of conditions. Each time you open the group, the accounts, contacts, or opportunities are re-evaluated using the conditions you defined. For example, suppose you want to target specific accounts to promote a conference in their area. To create the conference group, simply build conditional statements that look for active accounts meeting defined geographical criteria such as zip code, city, state, or area code. Accounts that meet these conditions are placed in your conference group. You can then perform a mail merge to send conference material to the accounts in the group.

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Headline News

Award-winning SalesLogix is recognized again with two CRM industry awards.

The "Willy Award" for ***Best Middle Market CRM Solution*** was presented to SalesLogix by *SellMoreNow.com*. "Willy" refers to lead character, Willy Loman, in the Arthur Miller play, *Death of a Salesman*.

SalesLogix was also honored with a *2003 Product of the Year* award from *Customer Inter@ction Solutions Magazine*.

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SalesLogix Groups Continued

Each time you access this group, SalesLogix dynamically evaluates all accounts using the conditions you have defined.

There also may be times where there is no clear set of conditions with which to select the correct accounts, contacts, or opportunities. In these instances, you can create an Ad Hoc group. Unlike groups based on conditional statements, ad hoc groups are static; the contacts, accounts, or opportunities remain the same unless you edit the group. For example, you may wish to invite a select group of accounts to a client appreciation dinner. There may be no clear set of conditions in SalesLogix that would select the accounts you wish to invite. Using ad hoc groups, you can choose these contacts from the **Contact List** view and save the selected contacts in an ad hoc group you could call "Client Dinner."

Creating New Groups

There are a number of methods you can use to create a new contact, account, or opportunity group. Each time you open the group, the query evaluates the database to determine which records to display. If you want to ensure the group does not change, create an ad hoc group instead. Let's explore two of the available methods of group creation: saving a lookup as a group and creating an ad hoc group.

Save A Lookup As A Group

After you create a lookup to find contacts, accounts, or opportunities, you may want to save the lookup as a group so you can access the list again. To save a lookup as a group, first create a lookup using either the **Keyword Search** or **Advanced Lookup**. Then click *Save As Group* from the **Lookup** menu. From the resulting **Query Builder** dialog box, enter a name and description for the group. If you like, you may then use any of the Query Builder tabs to control layout, sorting, appearance (e.g. fonts, colors), and ownership criteria. Finally, save the group by clicking *OK*. You can view a group from the **Account**, **Contact**, **Opportunity List, Detail Views**, or from the **Group Manager**.

Add An Ad Hoc Group

To add an ad hoc group, select one or more records from the account, contact, or opportunity list view. To select more than one record, hold down the *Ctrl* key as you click each item. Next, from anywhere in the grid, right-click and then click *Add Selected Members* to **New Group**. From the resulting Query Builder dialog box, enter a name and description for the group. You may then use any of the **Query Builder** tabs to control layout, sorting, appearance (e.g. fonts, colors), and ownership criteria. Finally, save the group by clicking *OK*. You can view a group from the **Account**, **Contact**, **Opportunity List**, **Detail Views**, or from the **Group Manager**.

Tips When Using Groups

Once you have created groups of accounts, contacts, or opportunities, there are a number of ways you can use them.

Share your groups with others. The groups you create are not automatically available for use by other SalesLogix users. If you wish to share one of your groups, use the SalesLogix Architect to release it. Company-wide groups also can be created directly in the Architect.

You can export a group to a file for use by another program such as Microsoft Access or Excel. SalesLogix supports .csv, ASCII delimited, Dbase IV, and Excel file formats.

Often, you may have the need to create a group that is similar to an existing group. The simplest way to achieve this is to use the **Group Copy** feature. From the **Group Manager** form, highlight the group you wish to copy from and click *Copy*. Then enter a name for your new group and make any changes in the layout or conditions.

Ten Ideas For Using Groups

1. **Monday Groups**
Do you have accounts that you call on every Monday morning to take their order? Create an ad hoc Monday Group to include these accounts.

2. **Birthday Groups**
Do you acknowledge your contact's birthdays? Create 12 standard groups corresponding to each month of the year (e.g. July Birthdays). Create customized correspondence offering your birthday greetings to each member of the current month's group.

3. **Support Ticket Management**
Create a group isolating different types of support tickets, software and hardware for example. In many companies a different set of technicians handles different types of problems so grouping them provides easy access for the technicians. Also include a group for warranty calls. Identify a potential quality problem. Get a handle on which types of support are the most costly by creating a group that sorts tickets by support type and within type by the number of support hours.

4. **Industry Group**s
Your company is primed to release a new product with specific application for the manufacturing sector. Create a standard group isolating accounts that have Manufacturing in the Industry field.

5. **Lead Source**
It is vital to know where your leads are coming from. Did that email campaign produce results? Was the telemarketing push a success? Create a quick list for each campaign and you can follow up with these prospects using material targeted to their interests.

6. **Trade Show Follow-up**
Create a group based on lead source to gather contacts you made at the fall trade show, and launch a campaign targeted at these opportunities.

7. **Maximize Your Effort**s
Capture the opportunities that have the highest probability of closing into a group called Hot Leads. Sort the members of the group in descending order of their sales potential and pick up the phone!

8. **My Account**s
Use the My Accounts group to filter out the accounts of other account managers to focus your attention on your core group.

9. **Find Duplicate**s
Routinely clean up your database by creating groups of contacts with duplicate email addresses, duplicate phone numbers, or a missing phone number. Use the group to identify and correct errors or typos.

10. **The One That Got Away**
Create a group of opportunities lost. Not only will this allow you to note the number of sales you are missing, but the dollar value lost and the reason why. Sort your list by the reason lost to help you decide what you should change to win those deals.

Groups add essential functionality to SalesLogix. Take advantage of your relational database by querying and grouping your data for maximum benefit. Call us with any questions you may have. ☆