

**Volume 2
Issue 3
Aug 2004**



Headline News

The Awards Keep Coming

SalesLogix was recently recognized with two awards for product leadership in the small and medium business CRM software market.

Top 15

Information Systems Marketing Inc. (ISM), a CRM consulting firm, named SalesLogix version 6.1 among its Top 15 Small and Medium Business CRM Software Packages for 2004. SalesLogix was

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SpeedSearch

See page 4 for more info!

Previewing SalesLogix Version 6.2

At Best's annual partner conference, Insights 2004, Best announced the release of SalesLogix 6.2. Here we look at the features of Version 6.2, which introduces several powerful changes certain to make your front office more productive than ever before.

Easier To Use

SalesLogix gets a facelift in V6.2, an updated look that enhances workflow, usability, and access to your data. A new **Split View** allows you to view a group list and individual records at the same time without the need to toggle between screens. To make the process of inserting Contacts and Accounts easier than ever, the insert views are combined into one view with many features. A new **Copy** toolbar button allows you to copy contact information to a **Notepad** which in turn may be pasted into a document or email message. **Mail Merge** benefits from improvements in V6.2, as does **Groups**. You now have the ability to share Groups and to save a record position in a group—this prevents it from defaulting to the beginning of the group when you return to the screen. New Accounts with multiple Contacts can be added from a single view and you can perform an instant check for duplicate records.

Version 6.2 supports **Windows Authentication**, enabling users to log in to SalesLogix automatically using their Windows ID. All user

administration for SalesLogix remains in the SalesLogix Administrator.

Customer Service And Support

Version 6.2 introduces SalesLogix **Customer Service**. Customer Service is fully integrated with the Sales and Support Clients, Please see our article on Customer Service. (page 3).

Support Client also benefits from enhancements in this release. They include a new Speed-

Search interface, and the sharing of Tickets and Contracts with the Sales Client and the Web Client as a result of the new Customer Service features.

Opportunity Management

The **Opportunity Entry Interface** for Windows and Web users has been redesigned in an efficient, user-friendly style. A single input screen replaces the Add Opportunities Wizard—now all data required to create a new opportunity

can be added from a single view. To increase efficiency and to keep data consistent, SalesLogix V6.2 lets you set **Opportunity Defaults** such as Status, Type, Probability, and Sales Process at the Administrator or User level.

To use all the new features and enhancements, you must fully upgrade to the new Opportunity Management forms and scripts as part of the upgrade bundle. There are several issues to consider when planning your upgrade, please contact us for more information or assistance.

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Bring your sales, support, and service teams together with SalesLogix Version 6.2.

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Sales Processing

Generating Sales Proposals is now easier than ever, and proposals can automatically include opportunity product and pricing tables. This is a tremendous time-saving feature, allowing you to complete more proposals in less time.

Reviewing sales statistics allows you to keep tabs on the sales pipeline and identify the brightest opportunities. Version 6.2 introduces the **Opportunity Snapshot** screen allowing you to view summary and opportunity details. A quick **Overview Info** window displays opportunity totals and key metrics for any group of opportunities you select, and allows you to export that opportunity information to Excel for graphing and further analysis. Now managers can perform a global update of opportunity statistics, such as close probability, saving time, and maintaining accurate forecasts.

Version 6.2 introduces a new, more flexible **Sales Process Engine** that promises to make this feature easier to use. Configuring and launching process activities such as meetings or literature requests now are complete with a single click. The **Sales Processes** feature has been redesigned into a checklist format using **Stages** and **Steps** within the process. You will be able to define Stages and Steps and associate corresponding close percentages with each. Sales Processes are no longer required to be completed in a set order. Individual steps can be designated optional and can be completed out-of-order, if you prefer. When you complete a step, a check of the checkbox advances the process to the next activity. An easier sales process means it's more likely to be used, increasing consistency in your sales channel.

SpeedSearch

As your corporate database grows, the need for an efficient way to retrieve your data becomes increasingly important. **SpeedSearch** is highly effective tool used to locate resolutions to customer issues quickly. In prior versions, SalesLogix SpeedSearch was only available for the Support Client (Tickets, Defects, Procedures, Standard Problems, and Documents), but in V6.2 you can search much of your Sales database as well, in-

cluding the Library, Attachments, Activities, and History. In addition, a wide variety of document types can be indexed, making it possible to search: prior Tickets, Attachments, Standard Problems and Resolutions, procedures, library documents, on-line manuals, FAQs, or white papers. The entire search engine has undergone a redesign, making it more efficient and easier than ever to use. **Advanced Filtering, Scoring, Sorting, and Preview** capabilities let you scan the results of your searches quickly.

If you search and find a resolution to an open service ticket, one click will populate the ticket with the resolution. Perhaps you didn't

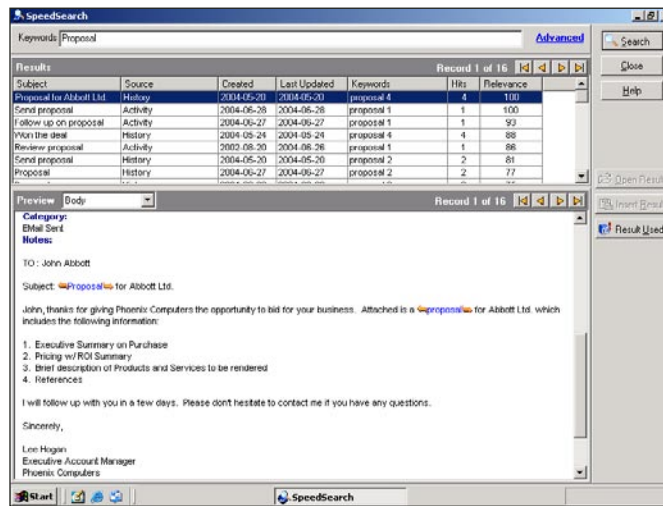
the new **Multi-Currency Support** is a significant benefit. This new feature allows you to designate a system-wide base currency, yet manage multiple currencies and corresponding conversion rates. You can maintain opportunities and generate your proposals in the customer's native currency, and even lock in the rate when an opportunity requires it.

Faster, Easier Implementation

Version 6.2 introduces a new **Setup Assistant** that appears after installation within the Administrator. The Assistant will guide you through the entire setup process, including importing and configuring licenses, offices, and new users. You can copy and paste licenses as a group from an email or text file, saving monotonous data entry and eliminating typos. You can import new users directly from Windows if you choose—Windows Active Directory is not required.

Keep Your Software Current

This upgrade is shipping to all customers with a current software maintenance contract. You should receive your upgrade software within the first few weeks of August. If you have received the SalesLogix 6.2 upgrade, we would be glad to help you with your software upgrade process, please call us to schedule an appointment. ☆



The Preview feature in SpeedSearch allows you to quickly view the contents of the search result without opening it.

find the resolution to your service issue in the database but later, when you determine the resolution, you can archive it in the knowledge base for future reference. Keyword searches of any SalesLogix table—even custom tables or shared network drives help you locate resolutions quickly, thereby improving your customer service.

Time And Money

Do you have satellite offices in other parts of the country? Do you schedule conferences with companies in other parts of the world? If so, V6.2 has two features of special interest. **Date** and **Time** within SalesLogix are now stored in **GMT** (Greenwich Mean Time), and displayed in each user's local time. An added benefit of this feature is that you can access a time zone calculator when you are scheduling meetings with customers or colleagues in other regions.

If you have accounts in foreign countries,

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chosen as a top CRM software solution after the ISM Software Lab put a field of CRM packages through intensive testing. Each CRM package was evaluated on hundreds of separate criteria.

Product Of The Year Honor

Technology Marketing Corporation's (TMC®) Communications Solutions® magazine, the premier Web publication and newsletter in the communications industry, has also recognized SalesLogix version 6.1 with its "Product of the Year" award. The publication's editors cited SalesLogix technology and vision as key criteria for the selection. ☆

It's All About Service

The New SalesLogix Customer Service Module

Your customers will rate your company's service based on their overall experience with you. It's up to every individual to ensure that the experience with your company is positive.

SalesLogix Version 6.2 incorporates a new **Customer Service** feature that effectively bridges the gap between Sales, Service, and Support, empowering each individual to research a customer's problem and see it through to resolution. In this article, we'll explore the features of Customer Service included in SalesLogix V6.2.

Support Or Customer Service?

It's nearly impossible to draw definite lines between departments and functions within most companies. However, there are fine, but notable differences between customer service and customer support as practiced in most companies. Here's how SalesLogix defines those differences.

Customer service has a customer emphasis, while support has product emphasis. Customer service is concerned primarily with issues such as sales or process-related questions, problems, or complaints. Support will spend more time on technical issues, for example, defect reporting and RMA creation are handled by the Support client. And finally, while you commonly charge for support services, customer service is usually complimentary.

Customer service adds functionality that is a welcome counterpart to the Support client. When taking a customer's call on the fly, how do you quickly decide whether to use Customer Service of Support? The answer is easy—you don't have to decide. Tickets that are logged using the new **Customer Service** features are accessible from Support, and vice versa. All the notes, resolutions, and activities relating to a ticket are visible and maintainable from either location. This seamless integration is the beauty behind SalesLogix Customer Service.

Ticket Management

You now can create and view tickets right from your Account, Contact, a menu, a toolbar, a Navbar, or a ticket group. When viewing a list of tickets from the **Ticket Tab**, a handy preview pane in the right-hand column gives you details without having to recall the ticket.

Ticket entry is speedy, with only the necessary fields visible. Simply select a Contact and a Contract, if applicable, and the ticket is created. You may then record the detailed information concerning the customer's question or problem. Assign the ticket a Status, Urgency, an Assigned to Party, Subject, Description, and Resolution of the issue. When you're typing into the memo fields, SalesLogix will automatically record the user name and a date/time stamp for convenience. Users can **Punch-in** and **Punch-out** of a ticket, allowing you to keep accurate track of the time involved in resolving each ticket. Schedule phone calls, meetings, and to-dos to ensure follow through on the part of your staff. Quickly send an email to the Contact, the Assigned To Party, the Account Manager, or your own manager right from the tick-

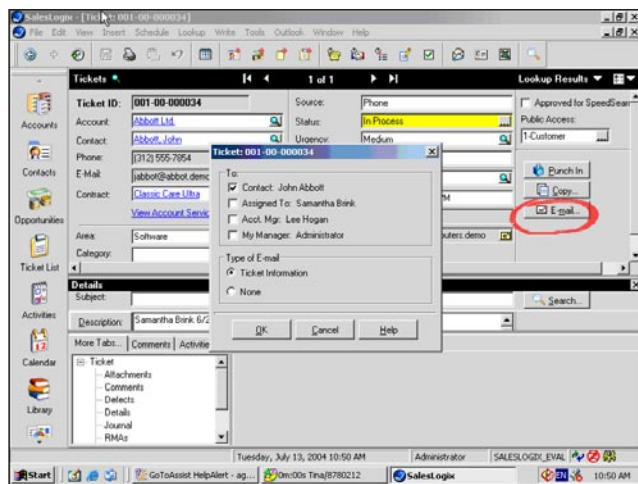
et by dollars, hours, days, or incidents, the **Service Contract** will keep the score. You can create contract templates to use when creating new contracts, thus speeding creation and standardization of the content. You can record important information about each Contract, such as PO Number, Purchase Date, List Price, and Discount. When viewing a Service Contract, the tickets and ticket activity recorded against the contract are easily visible, including the hours and dollars when appropriate.

Already Using Support?

If you already use SalesLogix Support within your organization, the introduction of Customer Service brings several advantages to you. In V6.2, all users share the same ticket and contract data. Tickets and service contracts created with Customer Service are identical to those

created from the Support Client. All of your named users will have access to Support, without using up one of the concurrent support licenses. This is of course true only if the named user has been given rights to Support by the SalesLogix Administrator. This change allows your support personnel to benefit from the additional features and functionality in the SalesLogix Client or Web Client interfaces. The Support Client interface remains, for those that prefer this interface.

The new Customer Service feature used alone, or in conjunction with the Support Client enables you to synchronize and coordinate your customer contacts ensuring a high quality experience sure to improve customer satisfaction. With it, you'll be equipped to handle blended sales, support, and service interactions. Your staff can act as complete customer contact managers, providing solutions that meet your customers' needs. ☆



With a click of a button you can quickly send an email right from your Ticket window in SalesLogix v6.2.

et view. More than one issue? Use the **Save and Copy** feature to copy the contact information to the next ticket. Use the **Internal Comment** memo block to record in-house notes unavailable to outsiders' view.

We've reported on the convenience of **Groups** before, and you now can create ticket groups, lookups, and reports to focus in on tickets with a particular attribute, such those assigned to a particular employee.

Service Contracts

Representatives can easily determine if a customer is authorized for specific services, and record the issues and support provided against the contract. Whether you manage contracts



Spotlight On SalesLogix SpeedSearch

The value of being able to rapidly resolve customer service issues is enormous. There is the obvious labor savings and the extra revenue produced by handling more calls each day. Less tangible, and perhaps more important, is the goodwill and reputation you build among your client base when they know that they can count on you to have answers to their questions.

Find It Fast With SpeedSearch

What tools do you have to increase your efficiency in resolving customer queries? How can you increase both productivity and customer satisfaction? One of the best tools is the **SpeedSearch** feature in SalesLogix, available for the first time to the SalesLogix Client in V6.2, and newly enhanced for the Support Client. Version 6.2 also makes the SpeedSearch function available to remote users. We highlighted some of the features of SpeedSearch in our article (page 2), but here we'll take a more in-depth look at how this powerful search engine can prove valuable to your call center.

Keyword Search

SpeedSearch now is available throughout SalesLogix, integrated into the workflow to enable you to find answers anywhere. 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.

SpeedSearch returns your results in a logical grid format, sortable by subject, source, date, etc. The grid even displays the keyword hits, the number of times each individual keyword you searched for was found in each result, as well as the total for all keywords. In the **Preview Pane** displaying the result, your keywords are highlighted, with arrows before and after to move you instantly to the next instance of the word within the result.

Using Your Results

If you are searching from within a ticket, a special **Insert Results** button will copy the text you select back to your open ticket. You also can open a ticket or other resulting document file from the search view.

As your representatives uncover a successful new resolution, they can submit the ticket resolution or defect for inclusion in SpeedSearch. If you choose, you can set up an approval process whereby only designated individuals can approve the tickets and defects for inclusion and specify at what access level they are available.

SpeedSearch Management

To keep the search engine up-to-date, **Full** and **Incremental Builds** are run automatically. Detailed build information is visible by accessing

the **Schedules Tab**. Here you will see a listing of the index name (e.g. activity, attachment, ticket), the type of build (full or incremental), the build schedule for the index (time and day), the date last run, size, and duration of the build.

Do you want to include files on shared servers, your intranet, or even the company Web site in your search? SpeedSearch now allows you to create custom file system indexes anywhere on the local network. Custom tables in SalesLogix also can be indexed, and you may restrict access to various indices by the type of user.

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. Tremendous time and effort goes into accumulating your company data, be certain you can find it when you need it. Look for SpeedSearch everywhere within V6.2.

As always, call us if you have any questions about this feature. ☆



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