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Issue 3  
July 2007**

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**Headline News**

Sage SalesLogix was recently selected by ISM Inc., Customer Relationship Management (CRM) and eCustomer strategic advisors, as a Top 15 CRM Small & Medium Business Software Award winner for 2007. Sage SalesLogix received the award for the ninth straight year.

Each product tested during ISM's evaluation program was rated according to 217 selection criteria.

**Sage  
SalesLogix  
Mobile 5.0**

See page 4  
for more info!

**Sage SalesLogix Advanced SpeedSearch  
Answers At Your Fingertips**

A sure way to increase productivity among your staff and enhance customer satisfaction is to find and deliver answers quickly. One of the best tools for finding answers quickly is the SpeedSearch function, part of your Sage SalesLogix CRM solution. SpeedSearch is available to Sales, Marketing, Customer Service, and Support users. Its capabilities are integrated into the workflow to enable you to find answers from anywhere throughout the Sage SalesLogix solution.

For those really tough searches there's a more powerful option available—Advanced SpeedSearch. It is available as an add-on solution and expands on an already powerful search tool by expanding its search capabilities to other documents on your network or PC. In this article we'll take a look at SpeedSearch and highlight the additional functionality available with Advanced SpeedSearch.

**SpeedSearch Overview**

With SpeedSearch you can enter a simple keyword or phrase and it will query Sage SalesLogix indexes for results. Choose which indexes to search, selecting from attachments, defects, documents, standard problems, and tickets. With Advanced SpeedSearch you can search directories on your local network or PC for other types

of documents, including Word or Excel files, HTML files, and PDF documents.

The Advanced Keyword Search function in SpeedSearch adds enormous flexibility and enables you to find results you otherwise may have missed by using features such as Sounds Like or Thesaurus. And you can filter your results—ask for only results created or updated within a date range or results that are frequently used.

The results matching your search are returned to you in an easy-to-read preview pane. A single line for each result appears in the upper section of the screen. Highlight a result and a preview of that result displays in the lower portion of the screen.

**Using Your Results**

When searching from within a ticket, a special Insert Results button allows you to copy selected text back into the open ticket. And as your representatives uncover a successful problem resolution,

they can submit the ticket resolution or defect so that it is available for other to reference in the future.

**Launch It**

Advanced SpeedSearch is of course available from within Sage SalesLogix, but it's also available as a separate application. You can launch the SpeedSearch client and begin searching even if



SpeedSearch enables you to quickly find answers to better serve your customers.

Compliments of:



Continued on Page 2

# Sage SalesLogix Advanced SpeedSearch CONTINUED

Sage SalesLogix is not running. What's the advantage of this? Advanced SpeedSearch is such a powerful search tool, you'll want to use it when working in other business applications and you need to find documents on your company network—customer related or not.

## Benefits Across The Company

You'll find that Advanced SpeedSearch is a benefit to users in every capacity of your organization. Here's a few ideas to get you thinking about ways SpeedSearch and Advanced SpeedSearch can benefit your organization.

**Customer Service:** Allow your customer service staff to search for pricing information in Excel spreadsheets, sales quotes in Word documents, or PDF product slicks on your intranet.

**Customer Support:** Enable your customer support team to quickly resolve customer issues by searching for: prior tickets; attachments, notes, and history; standard problems and resolution; activities; or HTML technical documentation on the company intranet. They can use advanced filtering to scan the results efficiently with scoring, sorting, and preview capabilities. If a resolution is found among the results, one click populates the service ticket with the resolution.

**Sales:** Empower sales staff to search for marketing collateral PDFs and Excel pricing spreadsheets to prepare sales quotes. Encourage them to use the date filter to find the most current documents for accuracy.

**Marketing:** Make it possible for the marketing team to search for activities, white papers, or other documents across internal networks to prepare for campaigns.

## Security Respected

Security is always of concern, but SpeedSearch respects the security rights you have established in Sage SalesLogix. Users will not be allowed to preview or open results that would violate their security privileges.

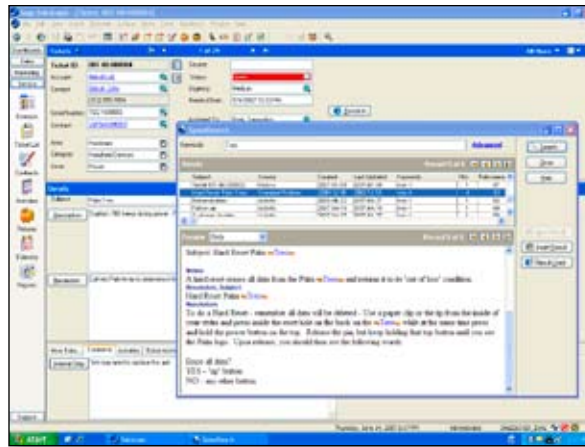
## Advanced SpeedSearch Benefits

While the standard SpeedSearch allows you to search basic indexes within Sage SalesLogix, Advanced SpeedSearch expands the search capabilities, opening up any custom indexes to

search any table/field in the Sage SalesLogix database, even customizations.

Standard SpeedSearch allows for document searching in a single, specific document directory, but Advanced SpeedSearch allows you to add indexes that allow searching inside documents across your company network, not just the Sage SalesLogix database.

Advanced SpeedSearch allows you to search for a word or phrase found in a multitude of documents or applications, including:



Advanced SpeedSearch unlocks data across your company's network, allowing you to deliver better customer service.

Sage SalesLogix, Microsoft Word (or other Office) documents, Adobe PDFs, Help files, Web pages, and more.

## Configuring SpeedSearch

You can configure SpeedSearch to best meet the needs of your users.

First, you'll define the Sage SalesLogix databases, and if you are using Advanced SpeedSearch, the directories and file types that you want SpeedSearch to access. You can even go as far as defining which fields in the database you want to appear in the results preview pane, and which fields should be available as filters.

A handy configuration option is the Frequent Solutions Options. A Frequent Solution is a result considered the most likely answer to a particular search. From the configuration screen, you'll tell the system the minimum number of times a file or record must have been used to qualify as a Frequent Solution.

You'll also specify the number of days an unused file or record stays on the list before it is not included any longer. Finally, you can specify the Decay Percentage—the rate per day the relevance of an unused file or record deteriorates each day. Especially applicable to Customer Service and Support users, these options help staff find the right solution quickly, amidst an ever-changing field of possible solutions.

Another variable you can control in SpeedSearch is the frequency in which the various indexes are updated. An index is simply a definition of something that SpeedSearch can search—Tickets, Contacts, and History are example of standard indexes.


Naturally, your data is not static; new information is constantly being added both within Sage SalesLogix and in other applications. In response to those changes, SpeedSearch needs to reindex. For each index, you can specify when SpeedSearch should reindex and whether it should be full or incremental. You might for example, perform a full reindex on each index every Sunday, and an incremental index at midnight each weekday.

## Take Advantage Of The Power

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.

As we mentioned, SpeedSearch is part of your Sage SalesLogix solution, available to you now. Advanced SpeedSearch expands the power of this tool to draw on more of your company's data stores.

If you are ready to take advantage of Advanced SpeedSearch, it couldn't be easier. There's no software to install, just call us for a license key. Armed with that key, you can unlock the power of the advanced features.

Give us a call for pricing or with any questions you may have. 

# What's New In Sage SalesLogix v7.2

Sage SalesLogix v7.2 is coming soon. Coincidentally, this release marks the 10th anniversary of the Sage SalesLogix product. New functionality is added in v7.2 that is designed to maximize the power of your Sage SalesLogix database. In this article we'll highlight the major additions and enhancements.

## Common User Experience

Does your organization have users accessing Sage SalesLogix from within the office, on their laptop computers while they travel, or over the Internet from home or another remote location? This version goes a long way toward delivering the same user experience to each of these users. A new Web client is added and Mobile client options are expanded in v7.2 to provide an interface similar to the Windows client interface.

Sage SalesLogix v7.2 brings a more Windows-like experience to Web clients including drag-and-drop tabs, middle-pane navigation to minimize scrolling, Vista-style icons, and minimal screen refresh. These features, not typical of most Web applications, enhance usability, minimize training, and speed adoption rates.

## No Code Customizations

One of the reasons you selected Sage SalesLogix initially is the inherent customization capabilities of the program. The Windows client has long benefited from the ability to quickly and easily execute many customizations without changing the underlying code base. The latest version brings this same ease to the Web and Mobile clients.

For the Web and Mobile clients, v7.2 introduces a new codeless, wizard and template-based approach that does not require extensive Web or programming knowledge.

## Advanced Customization

In addition to codeless customizations, advanced Sage SalesLogix v7.2 customizations can be made using standard development tools, such as Visual Studio.NET or the included Sage SalesLogix code editor.

A new online environment or sandbox is added in which code or content changes can be tested without affecting your production environment. Developers can create customiza-

tions in a test environment prior to deploying them into production, and the sandboxes can help maintain customizations during upgrades to future versions of Sage SalesLogix.

## New Web Platform

The newly engineered Sage SalesLogix Web client introduced in v7.2 can dramatically reduce your IT administration costs and resource requirements by speeding deployment and streamlining customization.

Deployment of the new Sage SalesLogix Web client can be made to one or many servers with a single click. If you prefer, deployments can be easily planned and managed for staged roll-outs.

For implementations where multiple Web servers/sites are deployed for load balancing purposes, the administrators have one-click deployment to multiple servers/sites. This significantly reduces the maintenance and administrative time necessary for your IT staff.

The Sage SalesLogix Web client is completely built on industry-standard technologies such as ASP.NET, AJAX, and Web services. As a result, you can easily integrate Sage SalesLogix v7.2 into your existing IT environment and set the stage for future growth and even greater collaboration. The customizations you develop can be moved to future versions of Sage SalesLogix easily, without difficult migration efforts.

This version utilizes layered n-tier architecture—an application model that separates the business logic layer from the user interface layer. This approach enables both customer and business partner customizations to easily move forward as new product releases become available—supporting easy upgrades.

## Single Development Environment

A single development environment for both Web and mobile customizations is introduced in v7.2.

Both Web and mobile customizations can be developed and managed within the same development environment—including standardized project tree views, code editors, and output and properties windows. This integrated development environment reduces the complexity

and speeds the execution of developing customizations for Web and Mobile solutions.

Once a customization is created, it can easily be bundled and shared across client solutions. As a result, your organization can reduce development time by re-using customizations.

In addition, the application model in Sage SalesLogix v7.2 separates the business logic layer from the user interface (UI) layer—this modular nature enables you to re-use previously developed components for faster customizations.

## Enhanced Mobile Client

Enhanced charting capabilities on the BlackBerry, Smartphone support, plus a flexible and customizable Mobile subscription option are a few of the new features added to the Sage SalesLogix Mobile client. See our article on page 4 for more details.

## Vista And Office Compatibility

Sage SalesLogix v7.2 is fully compatible with Windows Vista OS; however, Windows Vista Home editions are not supported. In addition, v7.2 is fully compatible with Office 2007.

Sage SalesLogix v7.2 is expected to begin shipping by the end of July. Call us for details or with any questions you may have. ★

## Tips & Tricks

Do you need to delete an attachment for an Account, Contact, Opportunity, or Contract? This tip shows you how. Keep in mind that you only can delete the attachments you have created.

- 1) In any Account, Contact, Opportunity, or Contract Detail view, click the *Attachments* tab (For tickets, click the *Ticket Attachments* tab).
- 2) Right-click on the attachment and select *Delete* from the drop-down menu.
- 3) At the Warning message box, choose one of the following:
  - ▶ Click the *Yes* button to delete the file and remove it from the computer;
  - ▶ Click the *No* button to delete the file from the account, contact, opportunity, or ticket record. ★



## In The Spotlight Sage SalesLogix Mobile 5.0

**H**ave you incorporated the Sage SalesLogix Mobile solution into your company's CRM solution? If not you are missing a huge opportunity to increase the effectiveness of your staff while they are on the road. Sage SalesLogix Mobile puts full-featured CRM functionality on your team's handheld devices—whether they be BlackBerry, Pocket PC, or Smartphone devices. The new version 5.0, released in conjunction with Sage SalesLogix v7.2, adds additional capabilities.

Sage SalesLogix Mobile is available for purchase as an add-on option to your Sage SalesLogix solution. The Mobile component provides users with full access to the system, enabling them to view, edit, and add contact and account details. In addition, they can take notes, schedule meetings, complete activities, update opportunities, and review ticket information—all from their handheld device. Let's take a brief look at Sage SalesLogix Mobile and what's new in v5.0.

### Clean User Interface

If you have been disappointed by the awkward, pieced-together look and feel of the handheld versions of some of the major software packages, you will be pleasantly surprised by the SalesLogix Mobile solution's look and feel. It's an easily navigated application that delivers instant access to your Sage SalesLogix database. Users familiar with Sage SalesLogix will have no trouble navigating the intuitive screens. And virtually all of the functionality you and your team need on a daily basis can be accessed from the handheld.

SalesLogix Mobile is designed around the needs of mobile users; convenient features like handwriting recognition and one-click dialing or the ability to e-mail from a contact or activity record enable users to get the most from Sage SalesLogix on their handheld devices.

### Streamlined Synchronization

With SalesLogix Mobile you will have one-click synchronization using wireless, wired, or dial-up connections back to your Sage SalesLogix Host Database or Remote Client. A rules-based push to the BlackBerry devices avoids the synchronization of all information, delivering just the desired amount and type of information at the right time. Small, incremental updates enable users to quickly and securely update client configuration changes, database schema changes, and bi-directional information updates.

### Easy Administration And Customization


With SalesLogix Mobile, administering and even customizing your company's mobile solutions is straightforward and efficient.

Through centralized deployment, management, and updating of multiple BlackBerry and Windows Mobile-based devices, your IT department saves time and gets users in operation quickly. Flexible and

extensible customizations are easily created through a simple drag-and-drop development environment. Read more about these codeless customizations in our article on page 3. SalesLogix Mobile uses native application development environments for the richest application experience for Windows Mobile (.Net) and BlackBerry (J2ME).

### What's New In Version 5.0

- ▶ **Expanded device coverage**—SalesLogix Mobile now supports Windows Mobile for Smartphone devices.
- ▶ **A new Mobile Subscriptions option** allows remote users to take just the right amount of account and contact records with them. Plus, they can easily search for and retrieve additional records by *subscribing* to them remotely.
- ▶ **Enhanced BlackBerry experience**—SalesLogix Mobile delivers charting capabilities on the BlackBerry, providing the ability to create and display customized charts.

Give us a call to learn more about Sage SalesLogix Mobile. 

sage  
software

Authorized Partner  
Select

Capitol Computer  
Systems, Inc.

406 Second Street  
New Cumberland, PA 17070

(717) 774-7406  
(717) 774-7367 fax

Email:  
renee@capitolcom.com

Web site:  
www.capitolcom.com

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