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Headline News

Sage Summit, the annual conference for Sage Software customers, will be held this year in Chicago during the first week of November. You'll learn about software, connect with other users, and generate lots of new ideas for growing your business. Go to www.sagesummit.com for the latest conference information, including great rates at preferred hotels.

Sage SalesLogix: Future Direction

When Sage SalesLogix launched in 1997, it was the first sales force automation product developed specifically to meet the needs of sales professionals and sales management. In the ensuing 10 years, Sage SalesLogix led the way, garnering multiple industry awards and helping organizations take control of sales and customer processes.

Sage SalesLogix is an integrated Customer Relationship Management (CRM) suite that includes Sales, Marketing, Service, and Support functions, as well as Business Analytics, Enterprise Resource Planning (ERP) integration, and Mobility solutions.

Industry Leader

Industry analysts single out Sage SalesLogix as the leader in the CRM field. An Opinion Paper published by IDC (International Data Corporation) in May 2007 states that "Sage SalesLogix v7.2 represents the first phase of Sage Software's state-of-the-art multiclient architecture strategy. With its introduction of this impressive technology release, the vendor reveals itself as a true competitive leader among CRM solution providers."

CRM Critical Success Factors

What is the Sage SalesLogix product vision that has impressed IDC? Briefly, the strategy addresses five critical success factors that allow CRM software to enhance business performance:

- ▶ Ability to gain business intelligence from your system's data

- ▶ Software matches user workflows to encourage adoption
- ▶ Tools to enable a flexible workforce to work from anywhere at anytime
- ▶ A solution that can effectively integrate with other systems, including back-office ERP systems
- ▶ A system that is affordable and easy to manage with quick ROI and low on-going costs.



Remote access to Sage SalesLogix allows you to be productive anytime, anywhere.

While Sage SalesLogix already has a strong offering for each of these five success factors, Sage Software recently published a multi-year roadmap outlining their continuing focus on these areas. Version 7.2, released earlier this year, provided customers with the first phase of the capabilities covered here. Let's take a closer look.

Gain Business Intelligence

The Sage Saleslogix system stores deep customer and business information. Future versions will automatically present this information at critical moments. Service representatives will immediately receive insight into the business value of the client they are speaking with, so they can tailor discussions appropriately. The system will automatically generate alerts based on background analysis.

Business intelligence will be embedded into existing workflow that automatically presents information and provides drill-down capability to additional detail. Predictive analytical reports will support extensive what-if modeling. For ex-

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Sage KnowledgeSync

See page 4 for more info!

Compliments of:



Sage SalesLogix: Future Direction CONTINUED

ample, a marketing person could study the impact on total lead count for a potential campaign by varying the mix of e-mail, direct mail, and other methods while holding total budget constant.

For business intelligence to be useful, the quality of CRM data must be very high. Sage Software plans to deliver built-in logic that helps you enter data faster and with higher quality. Entries may be completed automatically based on previously captured information. Utilities will scan data to find missing information and easily correct it, and provide easy integration with external data cleansing services. Built-in processes will assure quality when importing bulk data such as purchased leads.

Works The Way You Do

Ultimately, CRM systems must closely match existing processes and personal work styles to achieve broad-based adoption and enhanced productivity. While all CRM systems can be tailored to some degree, they are often either very simplistic or so complex as to require extensive custom programming.

The deep customization capabilities of Sage SalesLogix through the Application Architect enable customizations to be made quickly and for multiple client types from a single environment. In v7.2, Sage SalesLogix further evolved to offer this deep level of customization through codeless, wizard-driven tools.

Sage SalesLogix also will empower users to adapt the software to their personal workstyle. A flexible Center of Work screen is envisioned, providing a launch pad that will display today's scheduled work as well as suggested next steps. A graphical section will allow the user to see where they stand on key metrics and goals, such as calls per day and their current pipeline. The system will intelligently present work to be done through alerts and unread e-mail statistics. This Center of Work also will help manage unfinished work—an inevitable problem in sales processes—by tracking items such as new contacts or opportunities only partially entered.

Flexible Workforce

Today's modern workforce is constantly in touch and work is completed from many lo-

cations. Employees need anytime, anywhere access to critical data from a range of devices. Consider the following typical sales call to a customer site:

Prior to the call: Check existing support tickets to understand the customer satisfaction level. **During the call:** Answer questions immediately regarding available inventory, pricing, and delivery. Immediate access to information advances the selling process. **After the call:** Send a thank-you e-mail. **On the flight home:** Use your laptop to assign follow-up tasks, send product literature, and enter detailed notes. **Back in the office:** Connect up, send e-mails, and synchronize customer information.

These steps need to occur quickly and easily so information is up-to-date and available to all. Today, Sage SalesLogix offers interfaces for Windows, Web, BlackBerry and Windows Mobile clients, with a common customization environment for mobile and Web platforms.

The user experience will be further enhanced by leveraging location-aware technology. Imagine, after finishing a sales call early, the ability to see with the push of button a list of your highest-value customers, presented in order of geographic proximity. Select one and driving directions are sent to your wireless phone or BlackBerry.

System Without Borders

Since the CRM system is the hub of customer interaction, it's critical that it connects with other systems such as ERP, supplier systems, and company Web sites. Moving forward, the Sage SalesLogix focus is on integrations that have substantial out-of-the-box functionality and that may be customized further to meet specialized needs.

Interfaces will be included for common operations that require information from the ERP system such as pricing, quotes, orders, inventory, and credit history. These integrations will provide cross-application workflow and respect the security settings of both applications. Additional interfaces will focus on eMarketing, eCommerce, and data quality. Information will be made available for multiple remote devices. For example, a sales representative will be able

to use their mobile device to query order status or inventory availability with real-time feedback while meeting with a client.

Affordable And Manageable

Customers need solutions that are affordable, both for initial implementation and ongoing maintenance, and easy to manage. Sage Software plans to offer a graphical administration tool that provides a comprehensive view of all client types, making it easy for administrators to know when a user is having trouble connecting and take quick action.

Starting with v7.2, upgrades are more straightforward, even in highly-customized deployments, as the architecture separates the business logic from the presentation layer.

Sage Software will keep customization affordable by continuing to enhance the Application Architect for the “write once, deploy to many” strategy, enabling customizations to be created once and deployed to Windows, the Web, or to mobile devices.

Today, customers can greatly reduce the amount of specific customization required for their business by purchasing industry-specific customizations from Sage SalesLogix Business Partners. In the future, these partners will be able to use Application Architect tools to further isolate their own customizations, enabling them to upgrade the application without rework or roll-out delays.

In Summary

Sage SalesLogix is not only a powerful, market-leading CRM product today, but also offers a clear roadmap of how the software will be changed and expanded to serve customers even better. For customers who value a CRM solution that fully captures the uniqueness of their business, require high flexibility, and deep integration, Sage SalesLogix will continue to be the clear choice.

Sage Software has written a white paper that provides further detail of the future direction of Sage SalesLogix. It is available at: <http://www.sagecrmsolutions.com/slxvision>

Give us a call with your questions.



Sage SalesLogix Release Roadmap

	2007-2008	2009+
Increased Customer And Business Insight	<ul style="list-style-type: none"> Leads and defects Expansion of SFA, Marketing, and Service and Support Ad-hoc, visual analysis 	<ul style="list-style-type: none"> BI driven processes Scorecards Enhanced data maintenance automation Full customer lifecycle Support across suite Assisted what-if analysis using predictive models
Systems That Work The Way You Do	<ul style="list-style-type: none"> Recommended next steps Team and personal process automation Manage unfinished work 	<ul style="list-style-type: none"> Seamless office integration with CRM data and activities Task-oriented workspace Personalized workflow Team collaboration driven process automation
Systems That Enable A Flexible Workforce	<ul style="list-style-type: none"> Context-based Mobile actions Location-aware user interface 	<ul style="list-style-type: none"> No-touch, disconnected client Additional mobility device support Remote office rollup One-click deploy for remote office Dispatch and resource scheduling
Systems Without Borders	<ul style="list-style-type: none"> Prepackaged views CRM/ERP contracts Cross-application workflow 	<ul style="list-style-type: none"> e-Service integrations across multiple vendors e-Marketing referrals and surveys Closed-loop feedback Pay-as-you-go services Composite applications and standards (BEPL)
Systems You Can Afford And Manage	<ul style="list-style-type: none"> Legacy active form migration tools Turnkey upgrades One-click deployments 	<ul style="list-style-type: none"> BI wizard-driven customizations Web-based administration Write-once for Windows and Web Web-based Application Architect Write-once for Mobile, Windows, and Web

Planned Sage SalesLogix Release Of Service Packs For v7.2

Sage SalesLogix version 7.2, the first phase in Sage Software's innovative multi-client strategy, was released earlier this year. The Info-Tech Research Group placed Sage SalesLogix at the top of its *Decision Diamond* of all the CRM solutions considered. The Decision Diamond ranks CRM providers as Leaders, Competitors, or Followers, and considers both software product strength and vendor strength. Sage SalesLogix was the top-most product in the Leader section.

The chart above shows the future roadmap for the multi-client strategy, but some new capabilities have already been added. Service Packs 1 and 2 (SP1 and SP2) are planned for release in October and December 2007 respectively, and build on the capabilities of version 7.2. Along with maintenance items, SP1 will in-

clude several new Web client features and usability enhancements:

- ▶ Pass through authentication.
- ▶ Quicker development of customizations with Application Architect wizards for Create Entity and Quick Form development.
- ▶ Automatically pre-compile the Web Client for increased performance.
- ▶ Improvements designed to ease the process of localizing the software for particular countries and languages.
- ▶ Leads management in the Web client, including the ability to View, Edit, Insert, Group, Qualify, Convert, and Import Leads. (Bundled Separately in November)


Some usability enhancements also are included in SP1. Right-mouse button functionality is being added to the navigation bar in the Web cli-

ent, and button and controls usage will be more intuitive. The Web client will also include improved Windows Theme awareness for a consistent look-and-feel across your applications.

SP2 is scheduled for December 2007. This release will include numerous enhancements for the Web client such as:

- ▶ Tools to allow migration of customizations written for Windows clients to new Web client.
- ▶ Marketing capabilities added to the Web Client.

SP2 will also add further usability enhancements including enhanced Drag and Drop Tabs, UI Configuration Persistence, and Right-mouse button on Calendar.

Give us a call for more details on the upcoming Service Packs. 



In The Spotlight

Sage KnowledgeSync

Any Sage SalesLogix CRM system contains a veritable goldmine of customer and prospect information. Is your organization proactively using that information to maximize revenue opportunities and increase customer satisfaction? The Sage KnowledgeSync application can monitor your database and take intelligent action for you when specific conditions arise. It's like giving each team member a personal assistant to alert them to opportunities and issues requiring their attention.

Receive Important Information Anywhere, Anytime

Simply define the business conditions and Sage KnowledgeSync monitors your data and automatically sends alerts when conditions are met. Alerts arrive via e-mail, so field service and sales representatives can receive alerts via their mobile devices. Sage KnowledgeSync also can automatically update Contacts, Accounts, and History with important information; schedule, generate, and distribute reports; and even monitor your operating system for potential performance issues.

To help you get going quickly, sample Sage KnowledgeSync alerts are included with the software. You can use the sample alerts or tailor them to your unique needs. The sample alerts included are:

- ▶ Sales opportunities due to close this week, month, or quarter
- ▶ Key opportunities that are won or lost
- ▶ Open opportunities with no activity for X days
- ▶ New leads recorded in Sage SalesLogix
- ▶ "Hot" service and support issues
- ▶ Customer action alerts: Get Product Info, See A Demo, and Call Me Now.

Choose From Three Editions

Sage KnowledgeSync Alerts Edition

The Alerts Edition gives you the power to monitor your database to identify critical data and events and automatically send alerts via e-mail, fax, FTP, pager, and Web browser. Alerts can be sent to staff members, internal management, and/or clients and prospects. The Alerts Edition provides the ability to trigger (or schedule) the automatic distribution of files, such as documents and spreadsheets. For example, you could send a thank-you letter to all clients purchasing a certain product or send management a spreadsheet of the current sales pipeline.

You can monitor the status of pending or sent alerts to make sure your team is following up. You can even link related events together by specifying dependencies. The Alerts Edition connects to your Sage SalesLogix database and includes one External Access license.

Sage KnowledgeSync Corporate Edition


The Corporate Edition includes all the features of the Alerts Edition, and adds actions and reports distribution. With actions you can automatically update information inside both Sage SalesLogix and other programs, such as a spreadsheet. For example, the entry of an order might trigger a change in status of an account from prospect to cus-

tommer, which in turn triggers an e-mail sending a credit application to the customer, and updates a pipeline spreadsheet in Excel.

The Corporate Edition also adds the ability to generate and distribute Crystal Reports on a predefined schedule or based on certain conditions. This can in turn generate an HTML e-mail alert with text from the report. An XML event also can be triggered. For example, new promotional pricing could automatically update to your Web site.

Sage KnowledgeSync Enterprise Edition

The Enterprise Edition adds e-mail response. E-mail response provides the ability to trigger alerts based on the content of incoming e-mail messages and/or Web form entries. Incoming e-mail can be analyzed and automatically forwarded or re-routed. E-mail response is particularly useful for automating service and support desk functions. The Enterprise Edition also allows you to send an e-mail that will automatically generate and distribute Crystal Reports.

Version 7.0 of Sage KnowledgeSync was just released, and includes a Graphical Event Design module to make creating and using events easier than ever. We can only touch the surface of all the possibilities of business process automation with Sage KnowledgeSync here. Give us a call with your questions. 

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software

Authorized Partner
Select

Capitol Computer
Systems, Inc.

406 Second Street
New Cumberland, PA 17070

(717) 774-7406

(717) 774-7367 fax

renee@capitolcom.com

www.capitolcom.com

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