Welcome to Using Sage SalesLogix LAN – Power End User!

Agenda

Day 1 – Lessons 1-5

- Introduction to SalesLogix
- Accounts and Contacts
- Leads
- Opportunities
- Dashboards
- Workshop 1

Day 2 – Lessons 11-17

- Calendar and Activities
- E-mail
- Notes, History, and Attachments
- Lookups and Groups
- Templates and Mail Merge
- Contact Processes
- Reports
- Workshop 4
- Appendix A: Remote Client

Day 3 – Lessons 6-10

- Tickets
- Contracts
- Returns
- Defects
- Workshop 2
- Campaigns
- Workshop 3

A gap in the lesson sequence is intentional to accommodate classes that teach only sales, service/support, or marketing tasks. This course teaches all three tasks.

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Consider the Following:

In a technical training class, it's easy to get lost in the details. Our goal is to make sure you not only understand the details of how something works, but also WHY you need to know them. The "Consider the Following" questions are a good way to keep your mind focused on the bigger picture as you work.

Take a look at these questions now, and refer back to them as you work. When we reconvene as a group, we will tackle some of these questions in our discussion.

1: What is the difference between List view and Detail view? Are there any other viewing options available for a Main view?

2: Why might you see more accounts when you log on to SalesLogix than another SalesLogix user at your company might see?

3: How might you use SalesLogix to help you manage a large list of leads? What about a single lead?

4: What are some ways you could report on your opportunities—sales potential, average days open, and so on?

5: What dashboard could you use to see Year-to-Date sales for a particular account?

6 Do you have to track your time when working on a ticket? How does SalesLogix use this tracking data?

7: A customer wants to set up a service agreement with you that allows them to call you 15 times per year, regardless of the duration of the call. What kind of contract type in SalesLogix would be best in this case?

8: Returns work with assets—what is an asset? How can you add new assets in SalesLogix?

9: What is the difference between a defect and a ticket? How does SalesLogix differentiate between them?

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10: Does SalesLogix include any tools to actually help you create a marketing campaign? How do campaigns relate to CRM (contact relationship management)?

11: SalesLogix provides a number of ways to manage your upcoming activities. Why does SalesLogix also allow you to track an activity that already happened (a completed activity)?

12: What types of entries might you find on a contact's Notes/History tab?

13: Name a SalesLogix/E-mail integration feature you might find useful in your job.

14: Other than managing your views of data, why else might you use groups in SalesLogix?

15: What kinds of templates can you create in SalesLogix?

16: How could a contact process help a new sales person who is tasked with making a series of cold calls?

17: Getting data out of SalesLogix is sometimes just as important as getting data into the system. What options do you have for how you can deliver a SalesLogix report?

Answers to the "Consider the Following" questions are at the back of the course workbook.