

# The Sage SalesLogix Skinny

*Knowledge Checks, Frequently Asked Questions/Answers, and Vocabulary*

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## **“Consider the Following” Questions**

These questions are asked as part of the Sage SalesLogix Power End User Training course:

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

Each button on the Nav Bar corresponds to a Main view (what you see in the middle of the SalesLogix workspace). The Main view can appear either as Detail view, which shows details for a single record; List view, which shows a list of all records; or Split view, which shows both List and Detail views at the same time.

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

Each account has an Owner field; this field determines who can see the account. It could be set to Everyone, Everyone (View Only), a specific user, or a specific team. Your administrator sets up SalesLogix user and team profiles. If your profile is part of any of those options listed in the Owner field of an account, the account appears in your list.

### **How might you use SalesLogix to help you manage a large list of leads? What about one lead?**

If you can get your list of leads into a comma delimited format or text file, SalesLogix allows you to import lead data. If you want to add a single lead, you can enter the data manually into SalesLogix.

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

An opportunity represents the potential for making a sale and generating revenue for your company. There are several ways. The Opportunity Detail view allows you to view summary data and send that data in an e-mail. Or, you could copy the link to a particular opportunity, and then send it to another SalesLogix user. You could also view the Opportunity Statistics window, and run an opportunity statistics report or export data into Excel. For more filtering and control of the data, you could use the available dashboards or reports.

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

The Sales content set displays historical data for sales performance. Use it to identify strengths and weaknesses for accounts, regions, personnel, and other factors. You can use this information to help you increase sales.

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

Tickets are records of customer inquiries or complaints. You are not required to track your time while working on a ticket; however, if you want to or if your company mandates it, SalesLogix provides two ways to track time: a Punch In/Punch Out button and ticket activities.

**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?**

Contracts are service agreements that provide customers with an allotted amount of support, depending on the contract type. The contract type that works best for this scenario is incident. Other contract types include days, hours, value, and perpetual

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

Assets are products that your customers have purchased from you, which you might serialize for tracking purposes. This serial number might come in handy if the customer needs to make a return.

During the process of closing a winning opportunity, you have the option to designate which products from the opportunity will now be tracked as assets for the account.

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

A defect is a record that describes a problem with a product or process, or describes a feature request for a product or process. It is similar to a ticket, but people involved in the design or construction of the product typically resolve defects. SalesLogix does not have a Punch In/Punch Out button for defects and the type of data you collect for defects differs from tickets (like the product and version).

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

SalesLogix provides a template designer for letters and e-mails. You also have the option to integrate with a third-party e-mail marketing provider for more professional looking results. However, most direct mail campaigns, newspaper ads, and so on are designed by a marketing team outside of SalesLogix.

It makes sense to track campaign details in SalesLogix so you can measure the success of your campaign—how many contacts responded, what was the budget, did any responses result in an opportunity, and so on.

**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)?**

Even though an activity is not scheduled for an impromptu phone call, for example, it is still important to record it to history. That way, if the customer contacts you again at a future date, you have the notes in the customer's record to recap the previous call.

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

The Notes/History tab tracks almost all correspondence with a contact—notes, activities, e-mails, attachments, and so on.

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

SalesLogix integrates with Microsoft Outlook and Exchange, Lotus Notes, Novell GroupWise, and Internet Mail. In Outlook, several integration features are available: SendSLX button, Record to History options, SalesLogix Contact Address Book, and so on.

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

Groups help break up a List view into meaningful groups of records. You can also use groups when targeting a marketing campaign, sending a letter or mail merge, running a report, and so on.

**What kinds of templates can you create in SalesLogix?**

SalesLogix provides tools to create templates for letters, e-mails, and faxes.

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

A contact process is a series of predefined tasks (a path) from which to follow when interacting with your customers. Having a contact process for a new sales rep helps ensure the rep provides consistent service.

**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?**

You can run a report for just about any entity in SalesLogix—as well as filter the report to show only the data you want to see. Preview the report in a new window or export the report to a file (PDF, Excel, HTML, and so on).

## **FAQs from Sage Training Students**

**What is the difference between the Sage SalesLogix LAN Client and the Sage SalesLogix Web Client?**

The Sage SalesLogix LAN Client (also known as the Network Client) is installed on your local system. In other words, it is a program that you can access from your computer's "Start" menu. The Sage SalesLogix Web Client, on the other hand, is accessible through a Web browser and requires little to no installation. The features available in both Clients are very similar. Both applications operate from the same company database and require a personal logon, which determines the data you can see. If you make a change to a contact's phone number in the LAN Client, for example, that phone number is also updated for anyone who sees that same record using the Web Client.

**Does Sage SalesLogix support e-mail marketing?**

Yes! Out-of-the-box, Sage Saleslogix includes functionality to set up campaigns, but e-mail marketing is not included. To learn more about using campaigns without e-mail marketing, check out this article:

<http://slxtraining.net/2009/11/increase-your-selling-power-with-saleslogix-campaigns/>

As an add-on product, Sage SalesLogix E-marketing provides powerful e-mail automation capabilities and reports. You can create e-mails from hundreds of stock templates—or one of your own—and send directly to SalesLogix leads, contacts, and campaigns. You can also use Sage SalesLogix E-marketing to generate online surveys and Web forms and map survey responses directly back to specific fields in the SalesLogix database. To learn more about these features, visit

<http://www.sagesaleslogixemarketing.com/>.

**Why is there a Leads main view if there is already an option to mark an account as a "Lead" or "Prospect" Type?**

Every account record has a **Type** drop-down list. In the past, you could use this list to designate one of those records as a Prospect or a Lead. That way, when you viewed All Accounts, you could filter by this field or even generate a lookup or group.

However, when Sage SalesLogix v6.2.3 was released, it included the ability to track lead data in a separate main view (or table). Keeping lead data separate from your master account list is important for several reasons—1) The lead is tracked as a person instead of a company, 2) You can reserve the

Account and Contact main views (tables) for qualified data, and 3) You can import lead data using the Lead Import tool much more easily and safely than importing data into the pristine Account and Contact tables.

Some companies still choose to designate account records as a “Lead” type rather than use the Leads view for whatever reason—and that’s okay. But for most companies, that method is outdated.

**If I add an item to a pick list, can other users see it?**

No. When you add an item to a pick list (assuming your administrator allows access to do this), that item is only available to you. Only your administrator—or some other user with designated access—can modify pick list values for everyone.

**Can I add a contact to a campaign response if the contact is not included in the target list?**

Yes. Although most campaign responses can be tied to a target, Sage SalesLogix allows you to add a response for a contact that is not part of the target list. This scenario accommodates someone who may have received promotional materials by a forward from a friend or by passively picking up your marketing newsletter that was left in a shared or public location.

**Can I modify the default templates that are installed with Sage SalesLogix?**

Although those templates are available for modification, it requires access to the Sage SalesLogix Architect application. Consult with your company’s Sage SalesLogix Administrator.

**Can I design my own report in Sage SalesLogix?**

You can filter any of the out-of-the-box reports and save your preferences for frequent use. If you require a new report template, it requires designer software from Crystal Reports®. Consult with your company’s Sage SalesLogix Administrator.

## Sage SalesLogix Client Vocabulary

### Account

Accounts are your prospects and customers. Accounts can contain one or many contacts.

### Activity

SalesLogix can help you manage your daily activities, whether they are scheduled or unscheduled. Scheduled activities include phone calls, meetings, to-dos, and appointments. Unscheduled activities, such as returning a phone call or answering e-mail, may occur several times a day.

### Activity Reminder

The Activity Reminder appears when you have overdue activities, or if you need to confirm any activities. You can act on the listed activities, snooze them individually or as a group, or just close the Activity Reminder.

### Calendar

The SalesLogix Calendar displays both open and completed activities and events. If you have the correct access rights, you can view the calendars and activities of other SalesLogix users.

### Campaign

A campaign is a combination of various advertising, public relations, sales promotion, and selling activities used over a period of time to achieve predetermined sales or marketing goals. A campaign can target a specific industry or group.

### Contact

Contacts are the key people associated with an account.

### Contract

Contracts are agreements between accounts and your company to provide service and/or support for products sold.

### Dashboard

The SalesLogix Dashboard is a tool set that allows you to display and interact with a variety of performance and analysis information in a dashboard format. You can use the data provided to gain

insight into organizational and individual performance, discover root causes for performance issues, and then take corrective actions or make strategic decisions.

### **Detail View**

The Detail views contain in-depth information about one item at a time. The Detail view has three main sections: Detail area, Middle pane, and Tab area.

### **Defects**

Defects are records that describe a problem with a product or process.</term>

### **Group Button**

The Group button, located in the upper right corner of the view, displays a tree view of all groups. You can double-click a group in the tree view to open that group.

### **History**

When responding to scheduled or unscheduled activities, you may need to view the history of interactions with the contact or account. For example, if a prospect calls to ask a question she had from your last meeting, you can open the account history to view the meeting notes, including a list of meeting participants. The Notes/History tab contains all interactions, including full text notes, and provides filter options for viewing, e-mailing, and printing history items and notes.

### **Lead**

A lead is a potential customer. Leads can come from your own sources, such as current customers or trade shows, or they might come from commercially available lists.

### **Library**

The Library is a central repository for company information. Files are organized in folders. Your company's library may include product information, policies and procedures, presentations, Web addresses, and so on.

### **List View**

List views display information in a list with columns and rows of information.</term>

## Mail Merge

Using SalesLogix, you can create and edit templates, letters, and other business correspondence. You can then use Mail Merge to merge your template to a contact, an account, an opportunity or a lead.

## Menu Bar

The Menu Bar contains SalesLogix menu items. Each menu item contains a shortcut key, which is the underlined letter in the item name. For example, to insert a new contact or account, you can open the Insert menu, then press C. Shortcut keys also appear to the right of some menu items; you can press these keys to activate the feature. For example, to schedule a phone call, press SHIFT + F3.

## Nav Bar

Located on the left side of the SalesLogix workspace, the Navigation Bar (also called the Standard NavBar) contains buttons that open the main SalesLogix views. In addition, the NavBar also contains a set of buttons that group main view buttons into smaller sets to make it easier to select them. For example, clicking the Support button displays only the main view buttons necessary for managing Support functions. Click the up or down arrow at the top and bottom of the Navigation Bar to scroll up or down.

## Network User

A Network user, working on a machine connected to your company's network, makes changes directly to the main office database.

## Opportunity

Opportunities are potential sales to accounts and contacts. As an opportunity progresses, you can track the products involved in the opportunity, days in the pipeline, competitors, level of commitment by the prospect, and much more.

## Password

Passwords are case-sensitive. In addition, your system administrator may set restrictions on using blank passwords, your user name as a password, and other options. If necessary, see your system administrator to discuss your password options.

## Private Template

Private templates can be created by each SalesLogix user. When you create a private template, only you have access to the template. You can share your private templates with other SalesLogix users.

## **Public Template**

Public templates are created and distributed by your system administrator. Public templates are usually available to all users. When you copy a public template and save it to your computer, it becomes a private template.

## **Quick Find**

The Quick Find button, located in the upper left corner of the view, can be used to search for a particular contact, account, opportunity, ticket, lead, campaign, defect, contract, or return.

## **Remote User**

A Remote user, who has a subset of the database stored locally on his machine, makes changes to his Remote database. Once a day the Remote user connects to the main office database to deposit files containing changes from his Remote database. While connected, the Remote user receives files containing changes from the main office database.

## **Report**

The Reports view provides access to a set of pre-defined database queries that produce commonly used business reports. The specific reports available are determined by your system administrator, and are typically customized to the needs of your business.

## **Return**

Returns are records of an agreement between your company and a customer to accept a product back from the customer, and to provide the customer with a replacement or an account credit.

## **SpeedSearch**

Enables you to find information stored in the Sage SalesLogix database or external files.

## **Split View**

Split views display information from both the Detail view and the List view.

## **Status Bar**

The Status bar displays the current date, user, database, and status icons, such as whether or not you are logged on to e-mail. Right-click an icon to open a shortcut menu. You can show or hide the status bar by opening the View menu and clicking Status Bar.

**Synchronization**

Synchronization is an exchange of files between Remote users and offices and the main office.

**Ticket**

Tickets are records of customer inquiries or complaints.

**Title Bar**

The Title Bar identifies the active view.

**Toolbar**

The Standard Toolbar (also called the Toolbar) contains buttons that you click to open the most frequently-used SalesLogix commands. To move the toolbar, drag it to another part of the window. From the View menu, you can show or hide toolbars.