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Issue 1

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# Sage SalesLogix CRM Newsletter

## Stay Alert with KnowledgeSync for SalesLogix

The sooner you know about a potential issue or identify a trend, the sooner you can react and take steps to either resolve a problem or take advantage of an opportunity. But with so much data in your Sage SalesLogix CRM system, it can be difficult to find the critical pieces of information you need in a timely fashion. So why not have that data find YOU instead?

### Introducing SalesLogix KnowledgeSync Business Alerts

Sage KnowledgeSync is a “monitor & response” system that watches for changing conditions within your SalesLogix CRM database and automatically executes the appropriate response. On the **monitor** side of the equation, it leverages familiar business alerts technology. You know, those little reminders that a task is past due or a meeting is scheduled in 10 minutes.

But when it comes to the **response**, Sage KnowledgeSync really excels. After all, it may not be good enough to simply receive an alert because you still have to stop what you’re doing and take care of the situation ... unless you have Sage KnowledgeSync. It works hand in hand with your Sage SalesLogix CRM system so once an alert condition is triggered, it can be configured to automatically take action.

For instance, assume a prospect requests information from your website. Sage KnowledgeSync can send an email alert to the appropriate salesperson, send a personalized message to your prospect, automatically send a literature kit, and actually update your SalesLogix CRM database which eliminates the need to manually enter new prospect data.

### How Does it Work?

Simply define the business conditions that you want to monitor, then let Sage KnowledgeSync continuously scan your database and automatically send an alert when the condition is met. Alerts can be issued to email, fax, mobile device, and/or web browser and sent to staff, management, vendors, and customers. Plus, Sage KnowledgeSync can automatically respond by running a report and distributing it by email, updating your CRM database, update your accounting software, and just about any other event that you configure. You can use Sage SalesLogix KnowledgeSync to:

- Send alerts when key opportunities are won or lost or a forecast has been changed
- Monitor open opportunities with no activity in a week/month/quarter
- Monitor support tickets for activity like a change in priority or number of days unresolved
- Schedule, generate, and distribute reports based on data conditions in your CRM database
- Alert staff of expiring service contracts and schedule follow up calls

### If Your Curious, Give It a Try

You can get started with Sage SalesLogix KnowledgeSync with a FREE trial which comes with a collection of pre-configured alerts making it easy to get your feet wet and be up and running quickly. And if you decide that you like it, just flip the switch and go live.



For more info or to download the free trial visit: [www.sageknowledgesync.com/slx.html](http://www.sageknowledgesync.com/slx.html)

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sage

Authorized Partner

# Sage SalesLogix CRM in the Clouds

Sage recently announced its plan to offer a cloud computing version of Sage SalesLogix CRM sometime in early 2010. Whether its on-demand, hosting, Software as a Service (SaaS), or cloud computing, all of these technology buzzwords can get confusing. So we thought we'd take a quick look at cloud computing and explore what it means for Sage SalesLogix.

## What is Cloud Computing?

Cloud computing is a general term for anything that involves hosted services over the internet. It's a broad category that includes the popular "Software as a Service" (SaaS) model. Interestingly, the phrase was inspired by the cloud that often represents the internet in flow charts or diagrams.

## What are the Benefits?

The primary objective of cloud computing is to shift the burden of computer hardware support and IT service to the service provider thus reducing your ongoing support costs. Your service provider is generally responsible for the underlying hardware, software and ongoing maintenance. You simply pay for the use of SalesLogix CRM.

## What About SaaS?

As mentioned, SaaS is a category of cloud computing that has been popularized in the CRM world by Salesforce.com. But by many accounts, SaaS has its drawbacks including lack of control, data ownership, control over upgrades, and ability to customize the software to name a few. To address these concerns, the cloud computing version of Sage SalesLogix CRM will offer the following benefits:

- **Data Ownership** - you retain ownership of all your SalesLogix CRM data and processes.
- **Upgrade Control** - you choose when to upgrade to the latest version rather than having to adhere to your SaaS provider's schedule.

- **Customization Flexibility** - you can customize and adapt Sage SalesLogix CRM to your unique sales, support, and marketing processes without the common customization restrictions of SaaS offerings.
- **Deployment Flexibility** - cloud computing for SalesLogix offers the benefits of a hosted, on-demand CRM solution with the added flexibility of bringing it in-house for an on-premise implementation should your needs change.
- **Buying Options** - you can choose a traditional license or subscription option giving you the flexibility to purchase SalesLogix CRM in a way that fits your financial goals.

Sage is currently testing cloud computing for SalesLogix CRM as a pilot program so stay tuned for more details as we approach the product launch in early 2010.

## EFFICIENT LEAD MANAGEMENT

Did you know that SalesLogix CRM Version 7.5 is packed with new lead management features? A new **Lead Import Wizard** makes it easy to get leads into the system quickly (from a trade show for instance). Then let the **Lead De-duplication** tool take over and eliminate the time-consuming task of "cleaning" the data up. Finally, **Automatic Lead Routing** distributes leads to individuals or teams based on the rules you define, ensuring that the hottest leads will get to your salespeople fast!

If you haven't seen Sage SalesLogix Version 7.5 yet, contact us for a preview.

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