Sage SalesLogix

Getting Started with
Sage SalesLogix for Web

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Developed by Sage SalesLogix User Assistance

sage

Getting Started with the Sage SalesLogix Web Client

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Introduction

Sage SalesLogix is a leading customer relationship management solution that enables small to medium-sized businesses to acquire, retain, and develop profitable customer relationships through integrated Sales, Marketing, Customer Service, and Support automation solutions.

Why Use Sage SalesLogix?

The Sage SalesLogix Web Client helps you manage all aspects of the sales cycle and the customer relationship over the Web. In addition to tracking contacts, accounts, opportunities, tickets, and activities, users have access to tools for reporting, automating processes, and creating e-mails, faxes, and letters using mail merge.

Key Features

The following key features describe how you can use the Sage SalesLogix Web Client:

Contact, Account, and Opportunity Views - Use the Contact, Account, and Opportunity views to manage detailed information about your contacts, accounts, and opportunities.

Calendar and Activities - Use the Calendar to view open and completed activities and events. Use the Activities view to manage such daily activities as scheduling phone calls, meetings, and events.

Lookups - Use lookups to search for records or build groups. Lookups enable you to filter your record list, and then save the results as a new group. Lookup options vary by record type.

Groups - Use groups to organize your contacts, accounts, opportunities, tickets, and other data based on common characteristics. Groups can be used for reporting, mail merges, and more.

Campaigns and Leads - Use Leads to develop and qualify new Contacts and Accounts. Use the Campaign functions to combine advertising, public relations, sales promotion, and selling activities to achieve sales or marketing goals.

Mail Merge - Use Mail Merge when you need to communicate with a group of contacts, accounts, opportunities, or leads.

Reports and Analysis - Use Reports and filters to summarize information about your contacts, accounts, opportunities, contracts, and tickets. The Sage SalesLogix Dashboard view allows you to display performance and analysis information in a dashboard format.

Customer Service and Support - Use tickets to track, qualify, and resolve customer questions and issues. You can track time spent working on a ticket through Punch in/Punch out, create ticket activities that are charged against the customer's service contract, and schedule calendar activities. The Service and Support features also provide a means of tracking defects in products or services, and include a return process.

Literature Requests - Use literature requests to schedule sending marketing material or other documents to contacts. Literature requests are generally paper materials that must be mailed.

Library - Use the Library as a central repository for your company information. The Library often contains items such as product information, sales literature, and presentations.

Processes - Use processes to execute a series of tasks in a specific sequence over a set time period. The Sage SalesLogix Web Client offers Sales Processes and Contact Processes.

About This Guide

The purpose of this guide is to help you begin using the Sage SalesLogix Web Client. This guide uses scenarios to demonstrate how to use the Sage SalesLogix Web Client for many of your daily tasks.

If your company has customized the Sage SalesLogix Web Client, the number, order, and appearance of dialog boxes and screens may be different than described. See your system administrator for more information.

The Help symbol precedes online Help topic names where you can find additional information.

Related Documentation

- *Sage SalesLogix Quick Reference* card provides commonly used buttons, e-mail configuration options, and tips for working with groups and Outlook Integration. The *Sage SalesLogix Quick Reference* card is accessible from the Help menu.

- The *Sage SalesLogix Web Client Help* provides detailed information about all of the features available over the Web, including additional information about Send SLX and Mail Merge.

- The *Sage SalesLogix Mail Merge Help* provides detailed information on the following: writing an e-mail message to a contact, writing an e-mail message, letter, or fax using a template, and using the Mail Merge engine to send correspondence to a group of contacts, accounts, etc. This help system also explains how to create and print address labels or envelopes, as well as, how to create, edit, and delete templates.

Help is available in each Sage SalesLogix application. Additional resources and documentation are available to Partners and Customers with a valid technical support contract at the Support Portal Web sites:

- Sage SalesLogix Partner Support Portal Web site: partners.sagenorthamerica.com.

- Sage SalesLogix Customer Support Portal Web site: customers.sagenorthamerica.com.

Chapter 1
Understanding the
Sage SalesLogix Web Client Workspace

Take a few minutes to learn some of the Sage SalesLogix Web Client basics. It will help you become familiar with the workspace and navigation features.

In this chapter, you will learn to:

- Log on to the Sage SalesLogix Web Client
- Understand the Sage SalesLogix Web Client workspace
- Install and use Desktop Integration
- Get more help

Logging on to the Sage SalesLogix Web Client

Before you begin, locate your User ID and password. If you do not have this information, contact your system administrator.

To log on

1. Connect to your company's Web Client. If you have Windows Authentication configured, then you will not have to complete the remaining steps, but will be automatically logged on the Sage SalesLogix Web Client.
   This can be done several ways, depending on your browser. In many browsers, it is faster to set the initial screen as the default screen of your browser, or to add the initial screen to a list of favorite sites.

2. Type your **User Name** and **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.
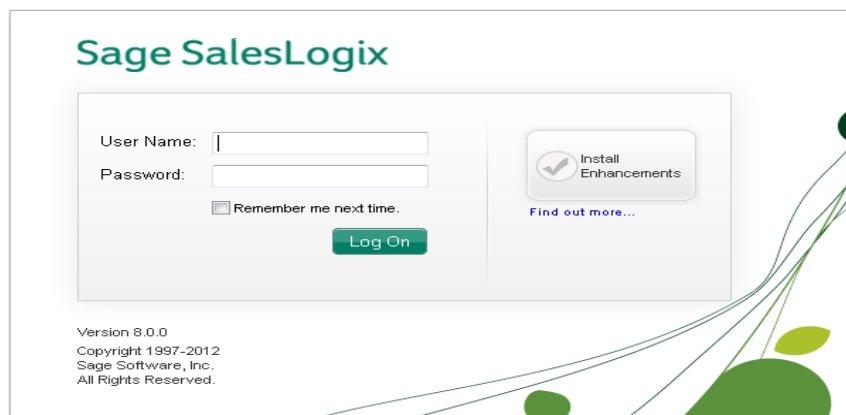
3. Click **Log On**.

Figure 1 The Sage SalesLogix Web Client Log in screen

To log off

- In the lower-right part of the browser window, click **Log Off**.

Working in the Sage SalesLogix Web Client

The workspace is the area where various views appear in the main Sage SalesLogix Web Client.

Some features require you to enable pop-ups. See your browser help for specific instructions on how to allow pop-ups.
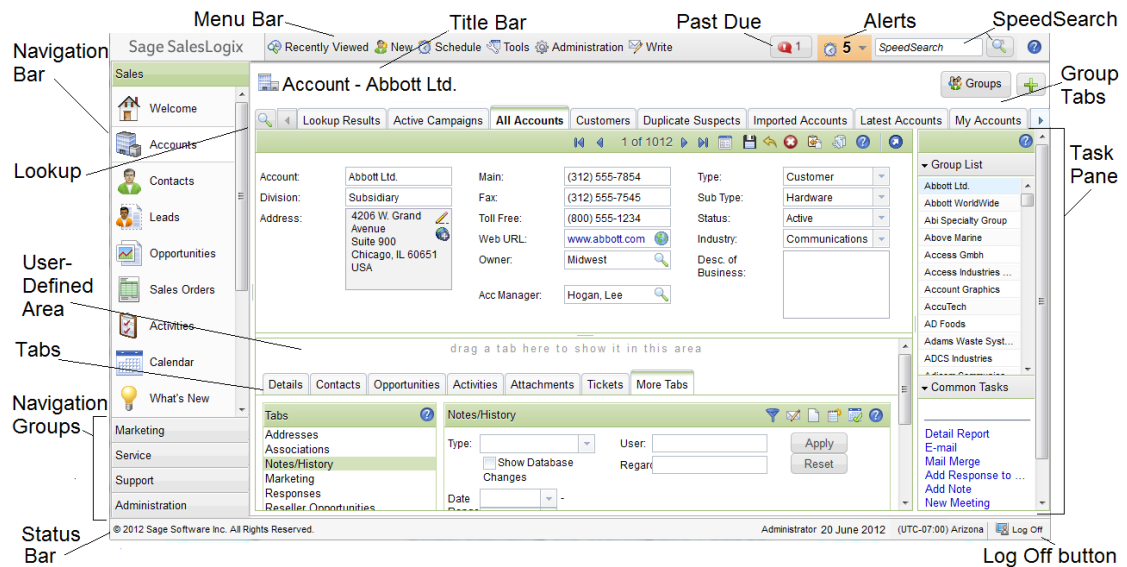
Figure 2 Sage SalesLogix Web Client Workspace

Understanding the Workspace Features

Each view in your Sage SalesLogix Web Client contains many of the following elements.

Your workspace may be different depending on your access rights or if your installation has been customized.

Element	Description
Title Bar	The title identifies the active view. When you are in a detail view, the title bar displays the name of the current record.
Menu Bar	The menu bar contains the Sage SalesLogix Web Client commands.These include Recently Viewed, New, Schedule, Tools, Write, Past Due, Alerts, SpeedSearch, and the Help button. Click a menu to expand it.

Element	Description
Navigation Bar	Located on the left side of the Sage SalesLogix Web Client workspace, the Navigation Bar contains buttons that open the main Sage SalesLogix Web Client views.
	Your administrator can group the buttons into Navigation Group subsets that focus on specific elements of your business, such as Sales or Support. For example, the Support group contains Contacts, Tickets, Defects, Activities, Calendar, and Reports.
Lookup	The Lookup button, located to the left of the group tabs in most list and detail views, allows you search from records using one or more search conditions.
Speed Search	SpeedSearch helps you find information stored in the Sage SalesLogix database. For example, you can search through existing tickets or procedures to help solve a customer's problem, or search for a specific document, like a sales presentation.
Tabs	Tabs organize information on many of the list views, detail views and dialog boxes.
Pick Lists	A pick list is a set of values you can select from when entering data. Pick lists are useful because they encourage consistent data entry. Your access rights determine if you can add, edit, or delete pick list items. To open a pick list, click the drop-down arrow in the box.
Task Pane	The Task Pane displays to the right of the main window pane. The Task Pane consists of filters, common tasks and other features designed to help you complete your work. The available options depend on the record type and type of view where you are working.
Status Bar	The status bar displays the user,date, time zone and Log Off button

Using List Views

List views display information in a list with columns and rows of information. Each tab in the list view contains a group of contacts, accounts, opportunities, or tickets and so on.

- You can customize your list view tabs by adding or removing columns, changing the column order and adjusting column widths.

  See "Customizing List View Tabs" in the Web Client online Help for more information.

- Clicking a column header sorts the information in that column. The arrow marker indicates whether the column is ascending or descending.

Figure 3 Account List View

Using Detail Views

Most records in Sage SalesLogix display information in both a List view and a Detail view. The Detail view consists of information boxes, tabs, and a user-defined middle section.

- The upper section shows basic information about the selected record. When you add a new record, dialog boxes guide you through entering the information that appears in the Detail view. To edit information, click the box you want to change.

- The middle section is called the user-defined area. You can use this area to keep the tab you use most often visible. To move a tab to the middle section, click one of the tabs in the bottom section, hold the mouse button, and drag the tab to this area. The tab will remain open in the user-defined area each time you use the Sage SalesLogix Web Client. If you want to change the tab in the middle section, select another tab and drag it to replace the current tab.

- The lower section contains a group of tabs. Each tab shows specific information you need for the related record. Your system administrator can create custom tabs for your company.

Figure 4 Account Detail View

Understanding the Available Buttons

Many features in the Sage SalesLogix Web Client are accessed through buttons. The following list shows each of the buttons available, and describes the action each button performs. When you drag your mouse across a button in the Sage SalesLogix Web Client, a tool tip explaining the button function appears. Buttons are referred to by their tool tip.

Button	Tool tip or Description	Event
	Account Service information	Click this button to open the Account Service Information dialog box.
	Add, Associate	Click this button to add or associate an item.

Button	Tool tip or Description	Event
	Add Condition	Click this button to add another parameter to the Lookup on the List or Detail views.
	Add URL	Click this button to attach a Web address URL.
	Associate	Click this button to associate an item.
	Calendar	Click this button to select a date and time.
	Close Print View	Click this button to close the Print View.
	Collapse	Click this button to hide additional information in a list row.
	Complete	Click this button to complete an activity.
	Copy Information to the Clipboard	Click this button to copy contact information to the Clipboard.
	Delete or Remove	Click this button to delete or disassociate an item.
	Edit	Click this button to edit information.
	Edit Form	Click this button to open the Web Form Designer. Only users with the appropriate role can access this feature.
	Ellipsis	Click this button to open a multi-select pick list.
	E-mail	Click this button to open a new e-mail message.
	Expand	Click this button to view additional information in a list row.
	Find	Click this button to perform a lookup.
	First	Click this button to view the first record in a group.
	Help	Click this button to open Web Client Help.
	Import Leads	Click this button to start importing leads from the Import Leads view.
	Last	Click this button to view the last record in a group.
	List View	Click this button to switch to the list view.
	MapQuest	Click this button to open MapQuest using the current address information.
	Mark this item as useful	Click this button if you find a solution helpful, but are not pasting it into your ticket.
	Maximize pane	Click this button to maximize the size of the window pane.
	Minimize pane	Click this button to minimize the size of the window pane.
	Move	Click this button to move a contact to a different account.
	Next	Click this button to view the next record.

Button	Tool tip or Description	Event
◀	Previous	Click this button to view the previous record.
🔖	Previous Keyword and Next Keyword (SpeedSearch)	Click these buttons to view the previous or next instance of a keyword found using SpeedSearch.
🖨	Print View	Click this button to open the Print View.
🔃	Refresh	Click this button to refresh the list of records in a list view.
🔍	Remove Condition	Click this button to remove a parameter from the Lookup on the List or Detail views.
↩	Reset	Click this button to clear any changes you've made since the last update.
💾	Save	Click this button to save your changes.
💾	Save & Clear	Click this button to save the new contact or account and clear the view in order to add another record.
💾	Save & New	Click this button to save the new contact and create another new contact for the same account.
🔍	SpeedSearch	Click this button to open SpeedSearch.
🗓	User Date Stamp	Click this button to put a user name and date stamp in your ticket notes.
🌐	WWW	Click this button to go to the account's Web site.

Getting Help

Information on advanced features and areas not covered in this guide is available in the Sage SalesLogix Web Client online Help topics.

To access online Help

- Click the Help button 🔵.

What do you want to do?	Topic Name
Log on to the Sage SalesLogix Web Client.	Logging on to the Sage SalesLogix Web Client
Find out what new features have been added to the Sage SalesLogix Web Client.	What's New in This Release
Find useful tips for first-time users.	New User Tips
Use Alerts to help me manage my activities.	Using Alerts
Customize the Sage SalesLogix Web Client options for my personal needs.	Editing User Options
Schedule a meeting and invite others.	Scheduling or Editing an Activity

What do you want to do?	Topic Name
Schedule an Event (such as a trade show).	Scheduling or Editing an Event
Access an overview of Sales Processes.	What are Sales Processes?
Add a campaign response for a campaign target	Adding or Editing a Response Information

In addition to the Help, you can find more information from the following sources:

System Administrator See your system administrator for answers specific to your Sage SalesLogix installation.

Training Sage SalesLogix offers training programs designed to meet your needs. Please contact training.crm@sage.com for more information about available Web-based and classroom-based training options.

Understanding Sage SalesLogix Desktop Integration

The Sage SalesLogix Desktop Integration Module is a collection of features to enhance your Sage SalesLogix Web experience.

These features include:

- Drag and Drop Attachments
- Drag and Drop E-mail from Microsoft Outlook
- Outlook Integration - Send SLX and Record to History
- Mail Merge
- Export to Excel
- Drag and Drop Library files (Administrator only)

Installing Desktop Integration

Before you can use any of the Desktop Integration features you must install the Desktop Integration Module.

> Offline Web Client users may have already installed the Desktop Integration module as part of the install process.

To install using Internet Explorer

1. On the Sage SalesLogix Web Client login screen, click **Install Enhancements**.

2. Click **Run**.

3. Close Microsoft Outlook and any open browser windows.

4. To install the Desktop Integration Module, click **Yes**.

5. If prompted that Microsoft Outlook or Internet Explorer is in use, close each program, and click **Retry**.

6. On the **Welcome** screen, click **Next**.

7. On the License Agreement screen, read the information, accept the agreement, and then click **Next**.

8. Do one of the following:

    • Select **Complete** to install all of the Desktop Integration features to the default install location.

    • Select **Custom** to select which Desktop Integration features you want to install or change the install location.

9. Click **Next**.

10. If you selected the Custom install, do any of the following, and then click **Next**:

    • If you do not want to install Office Integration (Mail Merge, Export to Excel, drag and drop), click the drop-down arrow next to **Office Integration** and select **This feature will not be available**.

    • If you do not want to install Microsoft Outlook Integration (Send SLX/Record to History and Desktop Manager), click the drop-down arrow next to **Outlook Integration** and select **This feature will not be available**.

    • To change the install location, click **Change**, browse to or type the desired install location, and then click **OK**.

11. Click **Install**.

12. Click **Finish**.
    The Desktop Manager opens, which allows you to set your Desktop Integration options for Send SLX and Record to History.

To install using Firefox

1. On the Sage SalesLogix Web Client login screen, click **Enhance SalesLogix**.

2. Click **Save File**.

3. In the **Downloads** dialog box, double-click **SLXDesktopIntegrationSetup.exe**.

4. Click **Yes**.

5. Close Microsoft Outlook and any open browser windows.

6. If prompted that Microsoft Outlook or Firefox is in use, close each program, and click **Retry**.

7. On the **Welcome** screen, click **Next**.

8. On the License Agreement screen, read the information, accept the agreement, and then click **Next**.

9. Do one of the following:

    • Select **Complete** to install all of the Desktop Integration features to the default install location.

    • Select **Custom** to select which Desktop Integration features you want to install or change the install location.

10. Click **Next**.

11. If you selected the Custom install, do any of the following, and then click **Next**:

- If you do not want to install Office Integration (Mail Merge, Export to Excel, drag and drop), click the drop-down arrow next to **Office Integration** and select **This feature will not be available**.

- If you do not want to install Microsoft Outlook Integration (Send SLX/Record to History and Desktop Manager), click the drop-down arrow next to **Outlook Integration** and select **This feature will not be available**.

- To change the install location, click **Change**, browse to or type the desired install location, and then click **OK**.

12. Click **Install**.

13. Click **Finish**.
     The Desktop Manager opens, which allows you to set your Desktop Integration options for Send SLX and Record to History.

Configuring Desktop Integration E-mail Options

Use the Sage SalesLogix Desktop Manager to enter connection information and set e-mail history options.

To set options

1. In the System Tray section of the Windows Taskbar, double-click the Sage SalesLogix Desktop Manager icon.

2. Do one of the following:
    - Web Client users - In the **Portal URL** box type the URL to connect to. Use the following format:
      http://servername:port
    - Offline Web Client users - In the **Portal URL** box type the URL to connect to. Use the following format:
      http://localhost

    > If you are using a fully qualified name, you may need to add *domain name.com* after the server name.

3. Do one of the following:
    - If you use your Windows account information to log in to Sage SalesLogix, select the **Use Windows Authentication** option.
    - Enter your user name and password information.
      a. In the **User** box, enter the user name you use to log in to the Sage SalesLogix Web Client.
      b. In the **Password** box, enter the Sage SalesLogix password for the user name entered above.

4. Click **Test**.

5. Under **History Options**, select when you want to be prompted when logging an Outlook e-mail as a Sage SalesLogix history record. Select any of the following:
    - **Prompt for Duplicate Contacts** - Prompts you when a duplicate contact or lead is detected.
    - **Prompt for Contacts** - Prompts you to select which contacts or leads the history item should be associated with.

- **Prompt for Unresolved Contacts** - Prompts you when a contact or lead is not found in the database.
- **Display History Details before saving** - Prompts you with the Complete E-mail dialog box before an e-mail message is recorded to history.

6. Select the **Display Tray Notifications** check box if you want to see pop-up messages that describe Desktop Manager activities as they occur.

For more information about Desktop Manager, refer to the Desktop Manager Online help system.

Chapter 2
Managing Contacts and Accounts

This chapter introduces you to the core of Customer Relationship Management (CRM) - working with contacts and accounts.

- Contacts are the key people associated with an account.
- Accounts are your prospects and customers. Accounts can contain one or many contacts.

You can use Sage SalesLogix to manage contact and account information. This includes daily interactions, such as phone calls, meetings, action items, or other correspondence.

In this chapter, you will learn to:

- Add a contact and an account
- Create an account association
- Use the Library
- Schedule a literature request
- Add a note and schedule a follow-up activity

Adding a Contact and Account

Sage SalesLogix focuses on account relationships. Therefore, all contacts must be attached to an account. Account and contact information is accessible by any Sage SalesLogix user who has the appropriate security. For example, you can create an account for Beeker Motors. Your Sales Assistant may not have the required security to access the account, but your Sales Manager can.

Understanding Account Ownership

Before creating an account in Sage SalesLogix, it is important to understand account ownership.

- The *Account Owner* has access to an account and can use any account-related activities such as scheduling activities and running reports. An account owner can be an individual user, a team, or all Sage SalesLogix users.
  Access to account data can be different for each user. For example, if a team owns an account, some team members may have read-only access to the account, while others have read/write access. Security is controlled by your system administrator.

- The *Account Manager* is responsible for managing the relationship with the account. This can include follow-up phone calls, meetings, preparing proposals, and working with the account's contacts. The account manager is a single individual.

The individual user designated as the account owner is often also set as the account manager. If a team is the account owner, a team member will usually be set as the account manager. Account owners and managers should be assigned according to your company's guidelines.

There are several ways to add contacts and accounts to Sage SalesLogix. This guide will explain the most common methods.

Our scenario:

You met Tom Dale and Joan Smith at a trade show. Tom and Joan (contacts) work for Beeker Motors (account). First you will add contact Tom Dale to a new account (Beeker Motors); then you will add Joan Smith to an existing account (Beeker Motors).

To add contacts and an account

1. On the **New** menu, click **Account/Contact**.

2. In the **Contact** box, type **Tom Dale**.
   To add hyphenated last names or names with a professional designation, click the Edit button next to the Contact box. Then use the Edit Name dialog box to specify a name prefix (such as Dr.), first name, middle name, last name, or suffix (such as C.P.A).

3. In the **Account** box, type **Beeker Motors**.

4. In the **E-mail** and **Web** boxes, add e-mail and Web address information.

   - E-mail - **tom.dale@beeker.mail**

   - Web: **www.beeker.web**

5. In the **Work Phone** field, type **5551234512**.

6. Click the **Look for Matching Records** button.
   This searches the database for records that have the same e-mail address, Web address, phone number, and account. It is important to search for records before adding information. If you do not check for existing information, you might create a duplicate contact or account.

7. Click **Cancel** to close the **Matching Records** dialog box, or if a duplicate record is found click **Open** next to a record to view additional details or **Use Account** to select a record. If you select Use Account, the account appears next to the Use Existing Account ... label in the Insert Contact/Account view.

8. In the **Contact Information** area, in the **Title** box, click the drop-down arrow and select **Vice President**.

9. Continue to add Tom's information in the **Contact Information** section.

10. Under **Account Information**, double-click in the **Address** box to open the **Address** dialog box and add the Address information for Beeker Motors, as follows:

    - Leave **Description** as **Office**.

    - Select **Primary** to identify this address as the primary address for this account.

    - Click the **Address Type** drop-down arrow and select **Billing & Shipping**.

    - In the **Address 1** box type **1234 Gary Parkway**

    - In **City**, **State**, **Postal Code** type **Oak Park**, **IL 60305**

11. Click **OK**.

12. In the **Main** box type **5551234500**.

13. (Optional) Use the **MapQuest** icon to see a map of the address.

14. Click the **Type** drop-down arrow and select **Customer**.

15. Click the **Status** drop-down arrow and select **Active**.

16. Click the **Industry** drop-down arrow and select **Automotive/Aerospace**.

17. In the **Acct. Mgr.** box, click the **Find** button, and then select the account manager.

18. In the **Owner** box, click the **Find** button, and then select an owner.

19. In the **Lead Source** box, click the **Find** button, in the third box type **tr**, click **Search**, select **Trade Show** and then click **OK**.

20. Click the **Save & New** button.
    This option allows you to add another contact to the existing account.

21. In the **Contact** box, type **Joan Smith**.

22. In the **E-mail** and **Work Phone** boxes, add e-mail and Work Phone information.

    ● E-mail - **joan.smith@beeker.mail**

    ● Work Phone - **5551234519**

23. In the **Contact Information** area, in the **Title** box, click the drop-down arrow and select **Managing Director**.

24. Click **Save**.

For more information see the "Adding a New Contact and Account" topic in the Sage SalesLogix Web Client Help.

Figure 5 Contact Detail view showing Joan Smith's information

If you need to edit a contact or account's information, you can do so by clicking the boxes on the Detail view and typing in the changes.

You must click the Save button after making any changes.

Adding an Account Association

Accounts may have a common connection, for example, one company may be a parent of another. You can create a relationship between accounts by adding an association. This association can be helpful for tasks like running reports. You can create one report for both accounts rather than two separate reports. Associations can also create opportunities for you to sell to parent companies rather than subsidiaries.

Our scenario:

Tom Dale told you that Beeker Motors was owned by International Machines. You want to create a parent/subsidiary relationship between the two accounts.

To associate accounts

1. Open the Beeker Motors Account Detail view.

    a. On the Navigation Bar, click **Accounts**.

    b. Click the Lookup tab (magnifying glass).

    c. In the first box select **Account**, in the second box select **Starting With**, in the third box type **Be**, and then click **Search**.

    d. In the list, click **Beeker Motors**.

2. On the Beeker Motors Account Detail view, click the **Associations** tab. If the tab is not visible, click the **More Tabs** tab.

3. Click the **Add Association** button.

4. Click the **Find** button (magnifying glass).

5. In the **Lookup Account** box, make sure **Lookup Accounts by**: shows **Account**, type **Int**, and then click the **Search** button.

6. Click **International Machines** in the account list, and then click **OK**.

7. Click the drop-down arrow below **Beeker Motors is a** and select **Subsidiary**.

8. Click the drop-down arrow below **International Machines is a** and select **Parent**.

9. In the **Description** boxes, type a description for each account.

10. Click **OK**.

Working with the Library

The Library is a central repository for company information. Files are organized into folders and sorted by name. Click the column headings to sort the library files list.

Your company's library may include product information, policies and procedures, presentations, Web addresses, and so forth. Only the administrator and an administrative user can add files to the Library.

Our scenario:

You want to use the Library to find current product information.

To access information from the Library

1. On the Navigation Bar, click **Library**.

2. In the tree view, click the "+" signs to expand the folder that contains the file you want to open.

3. In the list, click the **File** name of the file you want to download.

4. Do one of the following:

   - Open the file

   - Save the file

   For more information see the "Working with the Library" topic in the Sage SalesLogix Web Client Help.

Requesting Literature for a Contact

Literature requests involve sending marketing materials or other company documents to one or more contacts. Sage SalesLogix users or the system administrator manage the available literature. After you schedule a request, the person or group at your company responsible for literature fulfillment can fulfill and complete the request.

If you are making the request for a single contact, select the contact before you begin the following steps.

Our scenario:

Joan Smith requested information on a specific product at a trade show, but you had run out of brochures. You want to schedule a literature request to send the information to Joan.

To schedule

1. Open Joan Smith's Contact Detail view.

   a. On the Navigation Bar, click **Contacts**.

   b. Click the **Latest Contacts** group tab.

   c. In the Task Pane, under **Filters**, click **Name** and select **S**.

   d. In the list, click **Smith, Joan**.

2. On the **Schedule** menu, click **Literature Request**.

3. In the **Description** box, enter a brief description of the literature request.

   - Type **Lenovo ThinkPad sales brochure**.

4. Click the **Send by Calendar** button, select a date, and then click **OK**.

5. In the **Send via** (delivery method), and **Priority** boxes, click the drop-down arrow, select **FedEx** and **Medium**.

6. Under **Print Literature List**, select **with cover letter**.

7. Click the **Cover Find** button, expand **Public Templates**, expand **Letter**, select **Company Information**, and the click **OK**.

   > To use a template, you must download Sage SalesLogix Desktop Integration. See "Understanding Sage SalesLogix Desktop Integration " on page 10.

8. Under **Available Items**, select the items you want to include in your request.

   a. If necessary, click the **Filter available items** button and enter any characters contained in the family, number or name of the item you want to add.

   b. Select **Lenovo ThinkPad Brochure**.

   c. Double-click in the **Quantity** column and type the number of copies of that item you want to request. Type **2**.

9. Click the **Schedule Literature Request** button.

The literature request is recorded on the Literature tab in the Activities view and on the Literature Requests tabs in the Contact and Account Detail views.

The person assigned by the administrator to monitor Literature Requests will receive your request and should fulfill it by the date you specified.

Scheduling a Follow-up Activity

In Sage SalesLogix, phone calls, meetings, to-dos, and personal appointments are called activities. Scheduling follow-up activities can help you organize and remember important events.

Our scenario:
You want to schedule a phone call to follow-up on literature that was sent to Joan Smith.

To schedule a phone call

1. Open Joan Smith's Contact Detail view.

2. On the **Schedule** menu, click **Phone Call**.

3. In the **Regarding** box, click the drop-down arrow, and select **Confirm Literature Received**.

4. Use the **Location** field to type a location.

5. In the **Start Time** box, click the **Calendar** button to select the date and time when the activity will occur, and then click **OK**.

6. Do one of the following:

    - Select the **Timeless** check box to create an activity that occurs on a specific date, but at no specific time and without a specific duration.
      Timeless activities are displayed on the Calendar day view.

    - In the **Duration** box, type or click the drop-down arrow and select from the list.

7. Select the **Alarm** check box to set an alarm to notify you before the activity begins. Type or select a length of time.

8. Verify the **Name** and **Account** boxes contain **Joan Smith** and **Beeker Motors**.
    If any information is incorrect, click the Find button to change the information.

9.   Verify that your name is in the **Leader** box.

10. In the **Notes** box, type **Follow-up call for Joan Smith's literature request**.

11. Click the **Availability** tab to make sure you are available at the selected Start Time and or to add resources or other members.

> You can only add members or resources to phone calls and meetings.

12. Click **OK**.

You can view the scheduled phone call in the Contact and Account Detail views (on the Activities tab), in the Activities view (on the All Open and My Activities tabs), and in the Calendar view.

> For more information see the "Scheduling or Editing an Activity" topic in the Sage SalesLogix Web Client Help.

Adding a Note

You use notes to document the outcome of an activity and to record interactions with an account, contact, lead, or opportunity. The notes you add appear in the Notes/History tab on the Account, Contact, Lead, and Opportunity Detail views.

There are several ways to add a note. One method was chosen for the example below.

Our scenario:
You found Tom Dale's business card while cleaning out your briefcase. You had a note on the back indicating Tom was interested in a support contract for any products his company purchased. You want to add this information to Sage SalesLogix.

To add a note

1. Open Tom Dale's Contact Detail view.

2. On the **New** menu, click **Note**.

3. In the **Regarding** box, type **Business card notes**.

4. In the **Location** box, type **2012 Trade Show**.

5. If necessary, modify the **Completed** and **Scheduled** dates. To modify the date, click the **Calendar** button to select the date.

6. Leave **Timeless** selected since you do not need to enter a duration for the note.

7. Verify the **Name** is **Tom Dale** and the **Account** is **Beeker Motors**.

8. In the **Category** box, click the drop-down arrow and select an item from the list.

9. In the **Priority** box, click the drop-down arrow and select an item from the list.

10. Verify that your name is in the **Leader** box.

11. In the **Notes** box, type the information on the business card.

12. If necessary, click the **Attachments** tab to add a document or URL.

13. Click the **Follow-up** drop-down arrow and select the follow-up activity type. Select **To-Do**.Schedule a follow-up activity.

14. Use the **Carry Over Notes** or **Carry Over Attachments** check boxes to copy notes or attachments from this note to the follow-up activity.

15. Click **OK**.

16. In the **Schedule To-Do** dialog box, schedule an activity for today.

    a. For the **Regarding** type **Research**.

    b. In the **Notes** type, **Research a support contract for Beeker Motors**.

    c. Click **OK** to schedule the activity.

You can view notes on the Notes/History tab of the Contact, Account, Lead, and Opportunity Detail views. In addition, the Notes/History tab allows you to view and filter notes and other history items.

For more information see the "Adding a Note" topic in the Sage SalesLogix Web Client Help.

Chapter 3
Managing Your Sales Activities

Sage 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.

In this chapter, you will learn to:

- Use Alerts

- Complete an unscheduled activity and schedule a meeting

- Use the Calendar and Activities views

- View the history of an account

Using Activities and Events

Activities and Events provide a way to stay on top of your work responsibilities.

- Events usually span several days and might include trade shows, business trips and conferences.

- Activities include placing phone calls, attending meetings, and to do's, such as sending correspondence or preparing presentations.

- Activities can be associated with contacts, accounts, leads, opportunities, or tickets. Activities are generally scheduled for a specific time, but can also be scheduled as "timeless" activities. Completed activities become history items.

- You can schedule activities during an event, such as setting up various appointments and meetings for a business trip.

When you schedule an activity, it displays on the Calendar, Activities view, and in the Activities tabs on the Account, Contact, Opportunity, Lead, and Ticket views. Events display on the Activities view, Events tab and Calendar as well. The Sage SalesLogix Web Client includes an Alerts feature that alerts you to overdue activities and new activities that you have yet to confirm.

Several activity types are available to accommodate your work requirements. For instance, you can create general activities, recurring activities and more. In general, you can edit, delete, or complete activities and events that you create.

Using Alerts

Alerts help you keep track of activities with triggered alarms and unconfirmed activities. Your Alerts options determine how you will be alerted for alarms and new unconfirmed activities.

You can snooze or dismiss selected activity alarms, or snooze or dismiss all of your alarms. You can also view Activity details and accept or decline unconfirmed activities.

To view Alerts

- If the Alerts notification appears in your menu bar, click the drop-down arrow to display **Alerts** details.

> If the Alerts notification does not appear in your menu bar, then either you have no current alerts or your Alerts options may need to be changed.
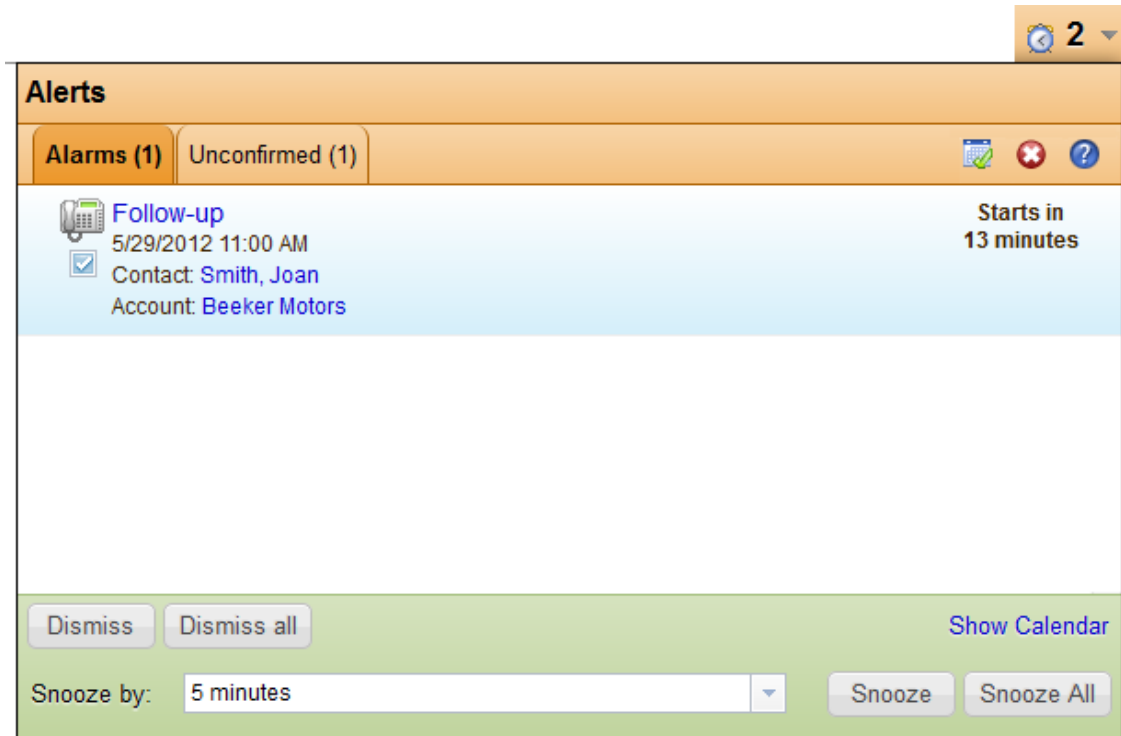
Figure 6 Sage SalesLogix Web Client Alerts view

To minimize Alerts

- If you want to hide your active Alerts, click the drop-down arrow in the Alerts area of the menu bar.
The Alerts view will remain minimized until you click the drop-down arrow again or you receive a new alert.

Alerts - Alarms Tab

The Alarms tab in the Alerts view lists activities with active alarms. You can snooze or dismiss alarms or view, complete or delete activities from the Alarms tab.

To snooze alarms

1. Select the check box for each activity alarm you want to snooze.

2. Select a time increment in the **Snooze by** box, and then do one of the following:

    - Click **Snooze** to snooze any selected activity alarms.

    - Click **Snooze All** to snooze all of the activity alarms, even if they are not selected.

To dismiss alarms

- Do one of the following:
  - Select the check box for each alarm you want to dismiss, and then click **Dismiss**.
  - To dismiss all alarms, click **Dismiss All**.

To go to the activity detail view

- Click the activity type and regarding information that appears in blue text next to the activity icon.
  Your Alerts are hidden and the activity detail view opens.

To go to view contact, account, or lead details

- To open the detail view, click the record name.

To complete activities

1. Select the check box for each activity you want to complete.
2. Click the **Complete selected activities** button in the top part of the view.

To delete activities

1. Select the check box for each activity you want to delete.
2. Click the **Delete Selected** button in the top part of the view.
3. Click **OK** to confirm the deletions.

Alerts - Unconfirmed Tab

An unconfirmed activity is an activity notification that you need to confirm or decline.

To view unconfirmed activity details

- Click the activity type and regarding information that appears in blue text next to the activity icon.
  Your Alerts are hidden and the activity detail view opens.

To accept or decline an unconfirmed activity

1. In the grid, click the unconfirmed activity that you want to accept or decline.
2. Do one of the following:
   - Click **Accept** to confirm that you will attend a phone call or meeting.
   - Click **Decline** to confirm that you will not attend a phone call or meeting.

To go to the Calendar view

- Click the **Show Calendar** link at the bottom of the view.

To go to the Confirmations tab on the Activity view

- Click the **Show Confirmations** link at the bottom of the view.

Completing an Unscheduled Activity

Unscheduled activities can occur unexpectedly throughout the day. It is a good idea to keep Sage SalesLogix open at all times so you can quickly access contact and account information. After you respond to an unscheduled activity, you should complete the activity in Sage SalesLogix to create a record of the interaction with the contact or account.

When you complete an activity, details about it are recorded on the Notes/History tab for the related account, contact, opportunity, or lead.

Our scenario:
You received an unexpected call from Tom Dale about a sales opportunity. You need to complete an activity for the unscheduled phone call and schedule a follow-up meeting.

There are several ways to complete an activity in Sage SalesLogix. The following method allows you to complete the activity, schedule a follow-up meeting, and carry over the notes.

To complete an unscheduled activity

1. Open Tom Dale's Contact Detail view.

2. On the **Schedule** menu, select **Complete an Activity**.

3. Select the **Create a New Unscheduled Activity to Complete** option.

4. Select **Phone Call**, and then click **Continue**.

5. In the **Regarding** box, click the drop-down arrow and select **Discuss Opportunities** from the list.

6. The **Completed** and **Scheduled** boxes automatically show the current date and time. You can accept the default, or select a new date and time.

7. In the **Notes** box, type **Tom Dale called about a possible sales opportunity.**

8. To schedule a follow-up activity

    a. Click the **Follow-up** drop-down arrow and select **Meeting**.

    b. Select **Carry Over Notes** to include your notes in the follow-up activity.

9. Click **Now** to complete the unscheduled activity.

10. In the **Schedule Meeting** dialog box, verify that the **Notes** field includes the notes from the phone call.

11. Select a date and time for the meeting, and then click **OK** to schedule the follow-up meeting

> For more information see the "Completing an Activity" topic in the Sage SalesLogix Web Client Help.

Inviting Others to a Meeting

When you schedule or edit a meeting or a phone call in the Sage SalesLogix Web Client, you can include other Sage SalesLogix users in the activity. These types of appointments appear on the Confirmations tab in your Activities view. You can accept or decline activities listed on the Confirmations tab. You may also receive an alert when you have an unconfirmed activity.

> **Our scenario:**
>
> You want to invite a co-worker (from your company) to your meeting with Tom Dale (a contact for Beeker Motors).

To invite others to a meeting

1. Open Tom Dale's Contact Detail view.

2. Click the **Activities** tab.

3. In the list, open the meeting you scheduled in the previous scenario.

4. Click the **Availability** tab.

5. Click the **Add Members and Resources** button.

6. In the **Available Members** list, select a user, then press the **CTRL** key and select **Conference Room 100**, and then click **Add**.

7. Use the Availability tab to make sure you, the other user, and the conference room are available for the meeting.

Figure 7 Availability tab

8. Click **OK**.

The other user wil receive an Alert to confirm the activity. After the user confirms or declines the meeting, you will receive a confirmation of the response.

> For more information see the "Scheduling or Editing an Activity " topic in the Sage SalesLogix Web Client Help.

Using the Calendar

Use the Calendar to manage your time and keep track of scheduled activities and events. The Sage SalesLogix Calendar displays both open and completed activities and events, depending on your calendar options. You can view your schedule by the day, week, or month view. Use the calendar right-click menu to schedule, edit, complete, or delete activities and events.

Your calendar security determines whose activities you can schedule, view, edit, complete or delete.

Depending on your access rights, you can view the calendars and activities of other Sage SalesLogix users. Each user has an assigned color to help identify which activities are for each user.

> Some icons may not appear in week and month views due to limited space.

Our scenario:

You want to check your calendar to see if you have time available to meet with your co-worker before the meeting with Tom Dale.

To view the calendar

1. On the Navigation Bar, click **Calendar**.

2. Select the type of calendar to view.

   - Day View - Displays a timeline for the day. Lists all scheduled activities and events for that day.

   - Work Week View - Displays only the days in your work week as defined in your user options. Lists scheduled activities and events for each day.

   - Week View - Displays each day in the selected week. Lists scheduled activities and events for each day.

   - Month View - Displays month calendar, listing scheduled activities for each day.

3. Each scheduled activity in the calendar is a link to the activity detail view. Rest your mouse over the activity to view its details. Click a link to open the selected activity.

4. To view another user's calendar, select the user's name from the **Calendar Users** list.

> For more information see the "Using the Calendar" topic in the Sage SalesLogix Web Client Help.

Using the Activities View

Use the Activities view to manage your scheduled activities, events, literature requests, and confirmations. If you have additional access rights, you can also view other Sage SalesLogix users' activities.

The tabs that appear in the Activities view are:

My Activities	All Open	Past Due
Alarms	Events	Confirmations
Literature		

The following icons provide information about the activity:

Icon	Description
	Phone Call
	Meeting
	To-Do
	Personal Activity
	The activity is unconfirmed. (Not available on all tabs)
	The activity has an attachment
	The activity is a single occurrence of a recurring activity
	The activity has an alarm

Our scenario:

You want to see how many phone calls you have tomorrow.

To view phone calls scheduled for tomorrow

1. On the Navigation Bar, click **Activities**.

2. Click the **My Activities** tab.

3. Use the Task Pane **Filters** to narrow the list:

   - Expand the **Activity Type** filter and select **Phone Call**.

   - Expand the **Time Frame** filter and select **Tomorrow**.
     All of the calls you have scheduled for tomorrow are shown in the tab.

4. (Optional) You can click the activity type to view its detailed information and make any required changes

Viewing a History of Interactions with an Account

When responding to scheduled or unscheduled activities, you may need to view the history of interactions with the contact and account or lead. For example, if a customer calls to ask a question she had from your last meeting, you can open the account history to view the meeting notes. 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.

Our scenario:
You want to review all the interactions you have had with anyone at Beeker Motor's.

To view account history

1. Go to Beeker Motors' Account Detail view.

2. Click the **Notes/History tab**. If the tab is not visible, click the **More Tabs** tab.

3. If necessary, click the **Filter** button and use the filters to narrow the list of history items.

4. Click the **Type** link of the history item you want to view.

For more information see the "Notes/History Tab" topic in the Sage SalesLogix Web Client Help.

Chapter 4
Communicating with Contacts and Leads

In addition to telephone calls and meetings, you may need to send additional information to your contacts or leads, such as proposals, letters, or memos. Through the Sage SalesLogix Write menu, you can create and edit templates, letters, and other business correspondence. You can then use Mail Merge to merge your template to contacts, leads, accounts, or opportunities.

Outlook Integration with Sage SalesLogix enables you to share information between Microsoft Outlook and Sage SalesLogix when you write e-mail messages, add contacts, and schedule meetings.

> If the Write menu is unavailable, you must download Sage SalesLogix Desktop Integration. See "Understanding Sage SalesLogix Desktop Integration " on page 10.

In this chapter, you will learn to:

- Create a template
- Use Mail Merge to send information to contacts
- Work with Microsoft Outlook e-mail

Working with Templates

You can use templates to create letters, proposals, faxes, or e-mail messages that will be used for more than one contact or lead. Templates use standard text that does not change, as well as mail merge fields that use Sage SalesLogix information that changes depending upon the contact or lead being merged. Sage SalesLogix has two types of templates:

- **Public templates** are created and distributed by the system administrator and stored in the Public Templates folder. Public templates usually are released to all users. When you copy a public template and save it to your computer, it becomes a private template.
- **Private templates** are created by a user and are automatically stored in the Private templates folder. When you create a private template, only you have access to the template.

Templates are created using Microsoft Word, so you must have Microsoft Word installed on your local machine for template creation.

> For more information see the "Managing and Selecting Templates" topic in the Sage SalesLogix Web Client Help.

Creating a New Template

These instructions help you create a new private Microsoft Word template.

Our scenario:

Tom Dale requested a pricing proposal for 150 motors. You need to create a new pricing proposal template.

To create a new template

1. On the **Write** menu, select **Manage Templates**.

2. In the **Manage Templates** dialog box, click **New**.

3. In the **Properties for: New Word Template** dialog box, do the following:

    a. In the **Template Type** section, select **E-mail**.

    b. In the **Name** box, type **Pricing Proposal**.

    c. In the **Family** box, select **E-mail**.

    d. In the **Main Table** box, select **Contact**.

    e. In the **Owner** box, your name should appear as the owner.

    f. Click **OK**.
       Microsoft Word opens for you to create the new template.

4. In the empty document, type the text you want to include in the proposal template.

5. To add Sage SalesLogix merge fields to the template, place the cursor in the template where you want the merge field to appear, click **Insert SLX Field**, then from the merge field list, select a field.
   The new merge field appears in the template.

6. Click **Save and Close**.
   The Pricing Proposal appears in the Private Templates folder under the E-mail family.

7. In the **Manage Templates** dialog box, click **Close**.

Using Mail Merge

You can use Mail Merge when you need to correspond with a group of contacts, accounts, opportunities, or leads. Mail Merge helps you simplify the process of sending the same information to numerous people by merging information into a template. You can merge to a file, send an e-mail, send a fax, or print the merged document.

Our scenario:

You recently provided a demonstration for upgrading all of your contacts at Beeker Motors, and want to send a letter thanking them for their time. You want to run a mail merge to send the information to all contacts at once.

To send e-mail using Mail Merge

1. On the **Write** menu, click **Mail Merge**.
   The Mail Merge dialog box appears.

2. In the **Template** box, click the **Open** button, expand the **Public Templates** list, expand the **E-mail** list, and then double-click the **Thank you - Demo** template.

3. In the **Merge With** area, select **Specific**, select **Account**, and the click the **Find** button.

4. In the Lookup, type **Be**, click the **Find** button, and then double-click **Beeker Motors** in the list.

5. In the **Output To** area, select **E-mail**.

6. In the **From** box, your name appears.

7. (Optional) Click the Address Book in the **CC** and **BCC** boxes to select any other recipients.

8. In the **Format** box, the default format of your selected template is shown; select another format if desired.

9. Click the **History Options** tab.

10. Make sure the **Add History record for each Contact** option is selected.

11. In the **Category** box, click the ellipsis button, select **Demo**, and then click **OK**.

12. Click **Merge**.
    The merged e-mails are sent to all recipients and history records are added for both contacts.

> For more information see the "Using Mail Merge" topic in the Sage SalesLogix Web Client Help.

Using Outlook Integration

If your company uses Outlook Integration, you can exchange e-mail messages between Microsoft Outlook and Sage SalesLogix. For example, you can:

- Compose an e-mail message in Outlook, and then click Send SLX to record the e-mail body and any attachments to the associated record.

- Select an e-mail message in Outlook, and then click Record to History to record the e-mail body and any attachments to the associated record.

- Drag and drop e-mail messages from Outlook to the Sage SalesLogix History tab.

- Click the E-mail button on the Contact or Lead Detail view to open a new e-mail message addressed to that lead or contact.

- Click the E-mail button on the Ticket Detail view to copy ticket information into a new e-mail message.

> For more information see the following topics in the Sage SalesLogix Web Client Help:
> - "E-mailing a Contact or Lead"
> - "Installing and Using Sage SalesLogix Desktop Integration"
> - "Sending an E-mail Message from a Ticket"

Our scenario:

You want to send an e-mail to Tom Dale and Joan Smith of Beeker Motors to tell them that you will be out of the office for a few days. You can use Microsoft Outlook and record the e-mail message in Sage SalesLogix.

To send an e-mail to multiple records using Outlook Integration

1. On the Navigation Bar, click **Contacts**.

2. Use the Lookup to find the contacts you want to e-mail.

    a. Click the Lookup tab (magnifying glass).

    b. In the first box select **Account**, in the second box select **Starting With**, in the third box type **Be**, and then click **Search**.

3. Select **Tom Dale** and **Joan Smith**.
    To select more than one record, hold down [Ctrl] or [Shift], and highlight the records.

4. From the Task Pane, under **Common Tasks**, select **E-mail** .

5. If the **Select Names** dialog box opens, select both names and click the **To** button, and then click **OK**.

6. If e-mail is enabled, but you have not logged on, at the message box, click **Yes** to log on.

7. In the **Subject** line, type **Out of Office**.

8. In the Body area, type **I will be out of the office for a few days. I'll contact you when I return.**
    Since you are using Outlook to send this e-mail message, you may want to record this to Sage SalesLogix History.

9. Click the **Send SLX** button.

Chapter 5
Managing Opportunities for Sales

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.

In this chapter, you will learn to:

- Add an opportunity
- Use Opportunity Statistics
- Close an opportunity

Adding a New Opportunity

Use the Insert Opportunity view to enter opportunity information and to add, edit, or remove products, competitors, or contacts. You can also update the opportunity currency and rate if you have Multi-Currency enabled.

> If you frequently use the same settings when adding opportunities, you can set default values. For more information see the "Setting Opportunity Options" topic in the Sage SalesLogix Web Client Help.

It is not necessary to complete all information when you add an opportunity. You can add the information that is most important to your company when you add the opportunity, and then update the Opportunity Detail view with more information later. For example, when you add an opportunity, you may want to note the probability of closing the sale, the dollar amount, and the estimated close date. Then add information as the opportunity moves through the pipeline.

- If you do not want to add products while adding a new opportunity, you can add them later using the Products tab in the Opportunity Detail view.
- Adding contacts to an opportunity allows you to target the individuals at the account and designate their roles and influence in the possible sale. If you do not add contacts while adding the new opportunity, you can add them later using the Contacts tab in the Opportunity Detail view.

Our scenario:

There is an opportunity for a sale of 10 printers to Beeker Motors. You want to create a new opportunity and add products and contacts.

To add a new opportunity

1. Open the Beeker Motors' Account Detail view.
2. On the **New** menu, click **Opportunity**.

3. Complete the following information:
Based on your Opportunities options, some boxes may already be completed.

- **Description** - Enter a name for the opportunity.
  To help track opportunities, use the account name in the opportunity description.

- **Account** - Verify that **Beeker Motors** appears.

- **Acct. Mgr.** - Click the **Find** button to find the person or team within your organization that manages the account.

- **Est. Close** - Click the **Calendar** button, select the date that the opportunity is estimated to close, and then click **OK**.

- **Status** - Your company defines the opportunity status list. Click the drop-down arrow, and select a status from the list.

- **Type** - Click the drop-down arrow, and select **New**.

- **Lead Source** - Click the **Find** button, click **Search**, and select **Trade Show**. Click **OK**.

- **Close Prob.** - Click the drop-down arrow, and then select the probability that this opportunity will be closed from the list.

4. Add the opportunity products.

   a. In the **Products** section, click the **Include Product** button.

   b. From the lookup, select **NetPrinter Laser Elite**, click **Add Selected**, and then click **Close**.

   c. In the grid, click the **Quantity** column and change **1** to **10**.

5. Add the opportunity contacts.

   a. In the **Contacts** section, click the **Include Contact** button.

   b. From the lookup, select **Joan Smith** and **Tom Dale**, click **Add Selected**, and then click **Close**.

6. Click **Save**.

Figure 8 Opportunity Detail view for Beeker Motors

Using Opportunity Statistics

You can use Opportunity Statistics to view opportunity information at a glance. You can view opportunity statistics for a group of opportunities, or you can select individual opportunities from the Opportunity List view. You can also export opportunities to Excel or view opportunity reports.

To open Opportunity Statistics

1. On the Navigation Bar, click the **Opportunities** button.

2. In the Opportunities List view, open the group of opportunities you want to view. You can open the opportunity group using the Opportunity Group list.

3. Select the records you want to view, and do one of the following:

   - Right-click and select **Opportunity Statistics**.

   - In the Task Pane, under **Common Tasks**, click **Opportunity Statistics**.

Figure 9 Opportunity Statistics view

4. When finished, click **Close**.

Closing an Opportunity

Closing an Opportunity

When an opportunity is won or lost, you should close the opportunity. For future reference and reporting purposes, you should provide the reason for closing the opportunity.

Our scenario:
Beeker Motors has agreed to your terms and pricing and now you may close the opportunity.

To close an opportunity

1. Open the Beeker Motor's opportunity in the Opportunity Detail view.

2. In the **Status** box, click the drop-down arrow, and select **Closed-Won** from the list. The Close Opportunity dialog box opens.

3. In the **Actual Amount** box, verify the amount of the sale is listed.

4. If necessary, modify the **Actual Close** date. To modify the date, click the **Calendar** button, select a new date, and then click **OK**.

5. In the **Reason Won** box, click the **ellipsis** button, select an item or items from the list, and then click **OK**.

6. In the **Comments** box, type **Delivery must be complete by the end of the financial quarter**.

7. Click **OK**.
   Beeker Motors' Opportunity Detail view appears with a Closed-Won Status and the Probability automatically updates to 100%.

To add an asset to an account

1. Click the **Beeker Motors** link.

2. Click the **Assets** tab. If the tab is not visible, click the **More Tabs** tab.

3. Click the **Add Asset** button.

4. In the **Add Asset** dialog box, click the **Name Find** button.

5. From the lookup, search for and select **NetPrinter Laser Elite**, and then click **OK**.

6. In the **Quantity** box, type **10**.

7. In the **Serial Number** box, type **BMNPLE001**.

8. Click **OK**.
   The asset appears in the product list for that account.

Chapter 6
Managing Leads and Campaigns

This chapter is an introduction to Sage SalesLogix Marketing. With Sage SalesLogix Marketing you can develop and qualify new sales leads, convert leads in into customer in a structures process, and create and manage sales campaigns while tracking their effectiveness.

In this chapter, you will learn to:

- Add leads to Sage SalesLogix
- Import leads to Sage SalesLogix
- Qualify a lead
- Add a campaign
- Add targets to a campaign
- Add stages and tasks to a campaign
- Add products to a campaign
- Launch a campaign
- Track campaign responses

Working with Leads

Leads are unqualified potential customers. Use lead qualification criteria to determine if a lead has valid information, already exists as a lead or contact, or is ready to be converted to a sales opportunity. Once qualified, a lead can be converted to or merged with a contact and account. You can also create a new sales opportunity.

Adding a Lead

There are many ways in which your company can acquire leads. They may buy lead lists, acquire another company's customers, or find a single lead while maintaining current accounts. If you have multiple leads, importing the information to Sage SalesLogix is the most efficient method. However, if you cannot import lead information, you must manually add the lead(s) to Sage SalesLogix.

Our scenario:
While you were speaking to a current contact, he mentioned his friend Bob Green may be interested in purchasing some software. You need to add Bob Green to Sage SalesLogix as an unqualified lead.

To add

1. On the **New** menu, click **Lead**.
2. In the **Name** box, type **Bob Green**.
3. In the **Company** box, type **Green Dentistry**.
4. In the **E-mail** box, type **bob.green@greendentist.mail**.
5. In the **Phone** box, type **5553211234**.

6. Click **Look for Matching Records** to search the database for leads, contacts and accounts that have matching information.
The Matching Leads dialog box appears. If a matching record displays in this dialog box, you can open the matching record to see if the lead, contact, or account is the same as the lead you are entering.

7. In the **Matching Leads** dialog box, click **Cancel**.

8. In the **Title** box, select or type **Managing Director**.

9. In the **Industry** box, click the drop-down arrow, select **Healthcare/Medical/Pharmaceutical**, and then click **OK**.

10. In the **Interested In** box, type **accounting software**.

11. In the **Lead Source** box, click the **Find** button.

12. In the **Lookup Lead Source** dialog box, click the **Find** button, select **Word of Mouth/Referral**, and then click **OK**.

Figure 10 Insert Lead dialog box

13. Click **Save**.

Importing Leads

Your company may purchase mailing lists or have a large number of potential customers that must be tracked in Sage SalesLogix. Rather than adding leads one at a time, you can import large numbers of leads to Sage SalesLogix quickly and easily.

Use the Import Leads view to import lists of leads into Sage SalesLogix. You may only import leads from a comma-separated-values (CSV) list. Valid file types include Microsoft Excel, .txt files, and other database file types, but files must be saved as a CSV file.

Our scenario:

Your manager has given you a file containing 200 leads. You want to import the leads into Sage SalesLogix so that you can begin calling them.

To import leads

1. From the **Tools** menu, click **Import Leads**.

2. Next to the **Select a file containing Leads information to start** box, click **Browse**, browse to the list you want to import, and then click **Open**.

3. Click the **Default Owner Find** button to select the person or team within your organization that will own the imported leads.

4. Click the **Default Lead Source Find** button and select **Purchased List - General**.

5. Make sure **Create a new ad hoc group** is selected.

6. Click **Next**.
   The wizard moves to Step 2, Define Delimiter.

7. Preview the records before they are imported. If necessary, select a different delimiter value, for example a comma, semicolon, or text qualifier.

   For more information see the "Defining a Delimiter" topic in the Sage SalesLogix Web Client Help.

8. Click **Next**.

9. Match the lead list fields and Sage SalesLogix lead fields. If you want to display all of the fields in both lists and any template, select **Show All Fields**.

   a. Select the external list field and Sage SalesLogix field to be matched.

   b. Click **Match**.
      Matched Sage SalesLogix fields display in the Matched SalesLogix Field column.

10. Repeat the previous step for each field that needs to be matched.

11. Click **Next**.
    The wizard moves to Step 4, Manage Duplicates.

12. Complete the Manage Duplicates information.

    a. Select **Check for duplicate leads**.

    b. Next to **Type**, select **Contact** and **Lead** make sure records do not already exist as a contact or lead.

    c. Under **Match Filters**, select the filter check boxes that you want to apply. For example, First Name, Last Name, Work Phone, E-mail, Account/Company.

    d. For this scenario, clear the Auto-merge duplicate records option.

       For more information see the "Rules for Automatically Merging Records During Import" topic in the Sage SalesLogix Web Client Help.

    e. If you want to check for duplicate records within the import source file, select the **Check for duplicates contained within the import source file** option.

    f. Click **Run the Test** to run the Find Duplicates Test on the first 100 records in the import or all of the records if you selected the previous option.

       For more information see the "Managing Duplicate Records" topic in the Sage SalesLogix Web Client Help.

13. Click **Next**.
    The wizard moves to Step 5, Select Import Actions.

14. Complete the Select Import Actions information.
    Use import actions to specify actions to be performed for the leads you import to Sage SalesLogix.

    a. Next to the **Add Note** action, click **Define**.

    b. In the **Add Note** dialog, select **Timeless**, and in the **Notes** box type **This record was imported from a list**.

    c. Click **Save**.

    For more information see the "Selecting Import Group Actions" topic in the Sage SalesLogix Web Client Help.

15. Click **Next**.
    The wizard moves to Step 6, Review.

16. Review the import selections and click **Submit**.
    The wizard moves to Step 7, Process Request.

17. When the import is finished, click the **Import Number** link to see the import history results in the Import History view.

Figure 11 Import Leads - Import History view

Qualifying a Lead

A lead may contain unqualified information. You can use lead qualification criteria to validate information and determine if the lead is a sales opportunity. Once qualified, you can convert a lead to a contact and account and create a new sales opportunity.

Our scenario:

You spoke to Bob Green on the phone and he has decided to order from your company. You need to add the information regarding Bob's purchase and convert him to a qualified lead.

If your Qualification criteria was customized by your administrator, the items you see in your workspace may be different.

To qualify a lead

1. Click the **Leads** button on the Navigation bar.

2. Click the Lookup tab (magnifying glass).

3. Use the **Lead** lookup dialog box to find Bob Green:

    a. In the Lookup by box, select **Name**.

    b. In the next box, select **Starting with**.

    c. In the third box, type **green**, and then click **Search**.

4. In the list, click **Green, Bob**.

5. In the **Qualification** box, click the drop-down arrow, and then click **Lead**.

6. Under **Qualification**:

    a. Select the **Valid Contact** check box.

    b. Select the **Budget for purchase** check box, and then in the corresponding text box type **5000**.

    c. Select the **Timeframe for purchase** check box, and then in the corresponding text box type **3 months**.

    d. Select the **Business need identified** check box, and then in the corresponding text box type **accounting software**.

    e. Select the **Decision maker identified** check box, and then in the corresponding text box type **Bob Green**.

7. Once the lead is qualified and ready to convert to a contact and account, click the **Convert Qualified Lead** button.

8. In the **Convert Lead** dialog box, verify that no existing contacts or accounts match the lead you are qualifying.

9. Click **Convert**.

Working with Campaigns

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. Sage SalesLogix Marketing allows you to track information such as the time frame of the campaign, products associated with the campaign, response rates for a campaign, and more.

Adding a Campaign

After you have determined what type of campaign your company plans to use, you can add the information to Sage SalesLogix.

Our scenario:
Your company has decided to run a return mail advertisement campaign to all leads and contacts in the state of Illinois. You need to add the campaign information to Sage SalesLogix. This includes the campaign targets, stages, and tasks that must be completed during the campaign.

To add a campaign

1. On the **New** menu, click **Campaign**.
   The Insert Campaign dialog box appears.

2. In the **Campaign Name** box, type **IL Return Mail Ad Q4 FY2012**.

3. In the **Description** box, type **Return mail advertisement for IL - Fall 2012**.

4. In the **Objective** box, type **Promote PC v7**.
   In this scenario, the objective of the campaign is to promote the new version of Pocket PC.

5. In the **Call to Action** box, type **Pre-register and save 10%**.

6. In the **Lead Source** box, click the **Find** button, and next to **Advertising - General**, click **Associate**.

7. In the **Status** box, select **Setup**.

8. In the **Code** box, type **RMAdQ42012**.
   The code is a unique identifier for this campaign.

9. In the **Start Date** box, type or select next Monday's date.

10. In the **End Date** box, select a date 3 months in the future.

11. In the **Manager** box, click the **Find** button, select your name, and then click **OK**.

12. Click Save.

Adding Targets to a Campaign

When you identify your targets, you isolate the contacts, accounts, and/or leads on which to focus your marketing efforts. Effectively targeting your audience allows you to make the most of your marketing campaign by spending time and money on a segment of the market most likely to purchase from your company.

To add targets to a campaign

1. On the Navigation Bar, click **Campaigns**.

2. Open the **IL Return Mail Ad Q1 FY2012** campaign in the Campaign Detail view.

3. Click the **Targets** tab.

4. Click the **Add Targets** button.

5. Use the filters to narrow the list of records.

    a. Select **Accounts (all Contacts)**.

    b. Select the **State** check box, select **Starting with** in the drop-down box, and then type **IL** in the text box.

6. To find out how many targets meet the filter criteria before searching, click the **How Many?** button.

7. Click **Search**.

Figure 12 Lookup Targets dialog box

8. Click the **Add Targets** button to add all the targets in the list and close the dialog box. The targets appear in the Targets tab grid.

Adding Campaign Stages and Tasks

To add a stage to a campaign

1. Open the **IL Return Mail Ad Q4 FY**2012 campaign in the Campaign Detail view.

2. From the **Campaign** Detail view, select the **Stages/Tasks** tab, and then click Add Stage.

3. In the **Description** box, type **Prepare ad slick**.

4. In the **Status** box, click the drop-down arrow, and select **In Progress**.

5. In the **Comments** box, type **Used in-house ad department. Updated campaign previously targeted to state of CA.**

6. In the **Start Date** box, select today's date.

7. In the **End Date** box, select a date one week from today.

8. Click **OK**.

Campaign tasks can help Sage SalesLogix Marketing users manage their campaigns. You can add and edit task information, or complete a task once it is finished.

To add tasks to a campaign

1. In the **Campaign Detail** view, on the **Stages/Tasks** tab, click **Add Task** next to the appropriate campaign stage.

2. In the **Description** box, type **Update CA ad slick from FY2011 Q4 campaign**.

3. In the **Status** box, click the drop-down arrow and select **Completed**.

4. In the **% Complete** box, type **100**.

5. In the **Needed Date** box, select yesterday's date.

6. In the **Assign to** section, select **Other Individual**.

7. In the **Assign To** box, type **Advertising Dept - Tom**.

8. Click **OK**.

9. To add another task, click **Add Task** next to the campaign.

10. In the **Description** box, type **Print new ad slick**.

11. In the **Status** box, click the drop-down arrow, and then select **In Progress**.

12. In the **Needed Date**, select a date 6 days from today.

13. In the **Assign to** section, select **Other Individual**.

14. In the **Assign To** box, type **Print Vendor**.

Figure 13 Add Task dialog box

15. Click **OK**.

Adding Products to a Campaign

Products are the goods and/or services that you are selling in a campaign. You can add products to a campaign when you add the campaign information to Sage SalesLogix, or you can add or change product information for an existing campaign.

Our scenario:

Management wants to add an additional incentive for the campaign. You need to add additional products to the direct mail campaign.

To add products to an existing campaign

1. Open the **IL Return Mail Ad Q1 FY2012** campaign in the Campaign Detail view.

2. Click the **Products** tab. If the tab is not visible, click the **More Tabs** tab.

3. Click the **Associate Products** button.

4. Select **GoStore 200GB** and **Kiva Big Mouth Briefcase**, and then click **Add Selected**.

Launching a Campaign

When all campaign information has been added to Sage SalesLogix, you are ready to launch the campaign. Launching the campaign allows Sage SalesLogix to begin tracking information used in reports, budgets, and so on.

When a campaign is launched, the campaign target contacts and leads are assigned to the first stage of a campaign and their status is changed to "Launched".

Our scenario:

After verifying all the campaign steps and information, you want to launch the campaign.

To launch a campaign

1. Open the **IL Return Mail Ad Q1 FY2012** campaign in the Campaign Detail view.

2. Verify all the information is correct.

3. Click **Launch**.

Tracking Campaign Responses

After you launch a campaign, you can begin to track the responses associated with the campaign. Campaign responses include who responded, the date, the response method, any notes, and so on. You can track responses during various stages of the campaign. Adding this information correctly helps your company to identify successful campaigns and stages to aid in refining and running successful campaigns in the future.

Campaign responses can be added and viewed in the Sage SalesLogix Web Client Client.

Our scenario:

You need to add a response for a recent campaign. The individual has decided to purchase from your company.

To add and view campaign responses

1. Open the **IL Return Mail Ad Q1 FY2012** campaign in the Campaign Detail view.

2. Click the **Responses** tab.

3. Click the **Add Campaign Response** button.

4. Select **Contact**, click the **Contact Find** button, type **st**, click the **Search** button, select the first name in the list, and then click **OK**.

5. Click the **Response Method** drop-down arrow and select **Phone**.

6. In the **Comments** box, type **Responded within 5 days. Qualifies for 10% discount and free carrying case**.

7. In the **Products** section, click **Add Product**, click **Search**, select **Kiva Big Mouth Briefcase**, and then click **OK**.

8. Click **OK**.

Chapter 7
Working with Customer Service and Support

This chapter introduces you to the Sage SalesLogix Customer Service and Support features. The Customer Service and Support features allow designated users to track, qualify, and resolve customer questions and issues.

In this chapter, you will learn how to:

- Understand and work with contracts
- Add, work in, and close tickets
- Add and close a return
- Add and close a defect

Working with Contracts

Contracts are agreements between accounts and your company to provide support for products sold. Sage SalesLogix has five general types of contracts that cover support services. In addition, a contract can cover a specific set of products, or it can be a "blanket" contract that covers all products the account owns. You can use contracts to verify that support should be provided to specific accounts for specific products.

Understanding Contract Types

The five default contract types are:

Type	Description
Days	The contract is tracked according to a number of days of services the account has purchased. This value is entered into the Quantity box for the contract. When the contract type is Days, and as activities are generated for the account, the value in the Remaining box will not decrement.
Hours	The contract is tracked according to a number of hours of services the account has purchased. This value is entered in the Quantity box for the contract. The total time is calculated using the Elapsed Hours value for all activities generated for the account. As activities are generated, the value in the Remaining box decreases to reflect the number of hours left on the contract
Incidents	The contract is tracked according to the number of service calls the account has purchased. This value is entered into the Quantity box for the contract. The total number of incidents reflects the total number of tickets the account has opened. As tickets are opened, the value in the Remaining box decreases to reflect the number of incidents left on the contract.

Type	Description
Value	The contract is tracked according to a currency value placed on the services the account has purchased. This value is entered into the List Price or Contract Amount box for the contract. When a ticket activity is created against the contract, the activity's Total value is charged against the contract amount, and the value in the Remaining box decreases to reflect the value left on the contract.
Perpetual	The contract has no limit. The account can open an unlimited number of tickets and activities for an unlimited amount of time.

To ensure that the time, number of incidents, or currency value left on a contract is tracked accurately, you must activate the contract before beginning work on a ticket.

Adding a Contract

Each contract you add must be connected with an account that already exists in Sage SalesLogix. The following scenario explains how to create a contract for an account.

Our scenario:

Tom Dale calls to request a new contract. He wants a one year contract that covers up to 10 incidents.

To add a contract

1. Open the **Beeker Motors** Account Detail view and select the **Contracts** tab. If the tab is not visible, click the **More Tabs** tab

2. Click the **Create Contract** button.

3. Complete the contract information boxes.

    a. In the **Reference #**, type a reference number for the contract.

    b. Verify that **Dale, Tom** is listed in the **Contact** box. If not, click the **Find** button and select **Tom Dale** from the lookup.

    c. Select **Active**.

    d. In the **Comments** box, type **New 1 year contract for 10 incidents. Qualifies for new customer discount.**

    e. Click the **Service** drop-down arrow and select **Classic Care Ultra** from the list.

    f. Click the **Contract Type** drop-down arrow and select **Incidents** from the list.

    g. Leave the **Start Date** as today's date.

    h. Click the **Expiration Calendar** button and select the date one year from today.

    i. In the **Quantity** box, type **10**. This specifies that the contract covers 10 incidents in the next year.

    j. Type a purchase order number in the **PO Number** box.

    k. In the **Purchase Date** box, select today's date.

    l. In the **List Price**, type **500.00**.

    m. In the **Discount** box, type **50.00** because he qualifies for a new customer discount.
        The Contract Amount is automatically calculated.

4. Click **Save**.

Figure 14 Contract Detail view

5. Associate Beeker Motors assets to the contract.

   a. On the Contract detail view, click the **Covered Assets** tab. If the tab is not visible, click the **More Tabs** tab.

   b. Click the **Associate Asset** button.

   c. In the lookup select **NetPrinter Laser Elite**, and then click **Add Selected**.

Working with Tickets

Tickets are records of customer inquiries or complaints. They can contain the information necessary to report, investigate, and close an inquiry or problem. Before you add a ticket, the account and contact must exist in Sage SalesLogix.

Adding a Ticket

Our scenario:

Tom Dale at Beeker Motors called. He is having a problem with one of their printers and needs the problem resolved by the end of the week. You need to create a ticket to work on the problem.

To add a ticket

1. Open Tom Dale's Contact Detail view.

2. On the **New** menu, click **Ticket**.

3. In the **Insert Ticket** view, verify **Beeker Motors** appears in the **Account Name** box.

4. If necessary, in the **Contact Name** box, click the **Find** button, and then select **Tom Dale**.

5. In the **Contract** box, click the **Find** button, use the **Lookup Contract** to select the contract you created in the previous scenario, and then click **OK**.

6. In the **Area** box, click the **Find** button and in the **Area** list select **Hardware**. Options available for Hardware appear in the Category list.

7. In the **Category** list, select **Printer**.

8. In the **Issue** list, select **Power**, and then click **OK**.

9. In the **Source** box, click the drop-down arrow, and then select **Phone**.

10. In the **Status** box, click the drop-down arrow, and then select **In Process**.

11. Click the **Urgency** drop-down arrow, and then select **Med-High**.

12. In the **Needed Date** box, use the **Calendar** button to select a date at the end of the week.

13. Verify the **Assigned To** box lists your name. If necessary, click the **Find** button and select your name from the list.

14. In the **Subject** box, type a short summary of the problem.

15. In the **Description** box, click the **Add problem timestamp** button, and then type detailed information for the problem.

16. Under **Comments**, in the **Internal** box, click the **User Date Stamp** button, and then type additional information that is important to the ticket.

Figure 15 Insert Ticket view

17. Click **Save**.

Adding Ticket Activities

Ticket Activities are added through the Ticket Activities tab on the Ticket Detail view. Ticket Activities enable you to track the time, the types of tasks, and any associated costs involved in

resolving a ticket. Activities are recorded by activity type and charge rate and are used for billing the customer against their service contracts. You can add your own ticket activities at any time from the Ticket Activities tab.

Our scenario:

You told Tom Dale that you will research his problem and call him back. You need to add a ticket activity for the research time.

To add a ticket activity

1. Open Tom Dale's ticket.

2. Click the **Ticket Activities** tab. If the tab is not visible, click the **More Tabs** tab.

3. On the **Ticket Activities** tab, click **Advanced**.
   The Insert Ticket Activity view opens.

4. In the **Type** box, click the drop-down arrow, and then select **Research**.

5. In the **Public Access** box, click the drop-down arrow and select **1-Customer**.
   This setting determines whether customers will be able to see the ticket activity using Customer Portal.

6. Verify that the **User** box displays your name. If not, click the **Find** button to locate your name or the name of the individual who will be responsible for completing the activity.

7. Verify that the **Start Date** box displays the correct start date and time for the activity. If not, click the **Calendar** button to specify the correct date and time.

8. Since you have not yet completed the activity, skip the **End Date** box. When you complete the activity, you will use the **Calendar** button to select the date and time you finished working on the activity.
   It is very important that you select accurate dates and times in both the Start Date and End Date boxes because this information is used to calculate the Time Units, Elapsed Hours, Rate, and Total Labor.

9. (If necessary) In the **Charge Type** box, click the **Find** button, select **No charge**,and then click **OK**.
   The charge type is the rate your company charges against the customer's support contract for the work you performed.

10. In the **Comments** box, type **Research printer power issues.**

11. Click **Save**..

For more information see the "Adding and Editing Ticket Activities" topic in the Sage SalesLogix Web Client Help.

Punching In and Out of a Ticket

The Punch In and Punch Out function enables you to track the time spent assisting a customer for each ticket. When you click the Punch In button on a ticket's detail view, Sage SalesLogix begins timing the activity. When you are finished, you can click Punch Out. Sage SalesLogix stops timing the activity and adds an activity record to the Ticket Activities tab for the ticket.

> When you use the Punch In/Punch Out feature in a ticket, a timed activity is automatically created.

Our scenario:

Tom Dale calls with more information on his printer problem. You need to open the ticket and track the time you spend talking to him and gathering information.

To punch in to and out of a ticket

1. From the **Beeker Motors** Account Detail view, click the **Tickets** tab, and click the ticket's **Ticket ID** number.

2. Click the **Punch In** button.
 The button text changes to Punch Out, and Sage SalesLogix begins recording time against the ticket activity.

3. Click the **Ticket Activities** tab. If the tab is not visible, click the **More Tabs** tab

4. From the list of ticket activities, click **Edit** next to the **Timed** activity you want to change.

5. Enter the information from your conversation with Tom Dale in the **Comments**.

6. Click **Save**.

7. When you are finished working on the ticket, click **Punch Out** to stop tracking time on the ticket.

Closing a Ticket

The stage at which a ticket is closed and the person responsible for closing a ticket depend on your company's processes.

Our scenario:

You resolved the problem with Tom Dale's printer and completed all follow-up activities. Now you want to close the ticket.

To close a ticket

1. Open Tom Dale's ticket.

2. Ensure all ticket information is complete and accurate.

3. Close any open ticket activities.

   a. Click the **Ticket Activities** tab.

   b. Click **Edit** next to the **Research** activity.

   c. Click the **End Date Calendar** button, select a date, and then click **OK**.

   d. Click **Save**.

4. In the **Status** box, click the drop-down arrow, and then select **Closed**.

5. Click the **Details** tab and update the **Resolution**.

    a. Click the **Date/Timestamp** button.

    b. Type **Printer overheats and turns off due to faulty fan**.

6. If you want to submit the resolution information to be accepted into the SpeedSearch indexes, select the **Submit for SpeedSearch** check box in the top pane.

7. Click **Save**.

Working with Returns

Returns are agreements to accept returned products from a customer for service, replacement, refund, or credit. This may also be referred to as an RMA or Return Materials Authorization.

Adding a Return

Every return must be associated to a ticket. Before you add a return, ensure that the related ticket exists. If necessary, create the ticket before proceeding.

Our scenario:
Tom Dale reported a problem with a printer and sent it in for repairs. After researching the ticket, you determined that the printer must be replaced.

To add a return

1. Open Tom Dale's ticket.

2. Click the **Returns** tab. If the tab is not visible, click the **More Tabs** tab.

3. Click the **Insert New Return** button.

4. Verify that the **Ticket ID**, **Account**, and **Contact** are correct.

5. In the **Reason** box, type **Printer overheats**.

6. In the **Customer PO** box, type the customer purchase order.

7. Click the **Status** drop-down arrow and select **Return Received**.

8. Click the **Type** drop-down arrow and select **Send Replacement**.

9. Click the **Priority** drop-down arrow and select **Next Day**.

10. In the **Expected By** box, click the **Calendar** button, and select this Friday.

11. Click **Save**.
    The Return Detail view opens.

Figure 16 Return Detail view

12. Click the **Ship To Details** tab. If the tab is not visible, click the **More Tabs** tab.

13. Verify the contact and address information is for Tom Dale at Beeker Motors.

Adding Products and Shipping Details to a Return

You add products to a Return to indicate which product the account is returning, and which is the replacement product to be shipped to the customer.

Our scenario:

You added the return for Tom Dale's ticket and now want to add the product asset that Tom is returning.

To add an asset to a return

1. Open the detail view for the return you created for Tom Dale's printer.

2. Click the **Details** tab. If the tab is not visible, click the **More Tabs** tab.

3. In the **Assets to Return** section, click the **Associate Asset** button.

4. Locate and select the **NetPrinter Laser Elite printer** using the lookup.

5. Click **OK**.

To update the shipping contact information

1. Click the **Ship To Details** tab. If the tab is not visible, click the **More Tabs** tab.

2. Verify that **Tom Dale** is the **Contact**.

3. Use the **Ship Via** and **Tracking #** boxes to include additional shipping information.

4. In the **Attention** box, type **Tom Dale**.

5. Verify that the address information is correct.

6. Type any special shipping instruction in the **Special Instructions** box.

7. Click **Save**.

To add the products to be returned and replaced

1. Under **Assets to Ship**, click **Add Return Shipped Product**.

2. In the **Add Return Shipped Product** dialog box, under **Received Product**, click the **Find** button, select **NetPrinter Laser Elite** printer, and then click **OK**.

3. Select **Return Existing**.
   The returned product is automatically added.

4. Click the **Shipped DateCalendar** button and select today's date.

5. Click **OK**.

> For more information see the "Using the Return Ship To Details Tab" topic in the Sage SalesLogix Web Client Help.

Closing a Return

The stage at which a return is closed and the person responsible for closing the return depend on the process within your company. As an example, when the product has been returned by the customer and the replacement product has been shipped, that might be the stage at which you would close a return.

Our scenario:
Now that Tom Dale's replacement printer has been shipped to him, you want to close the return.

To close a return

1. Open the detail view for the return you created for Tom Dale's printer.

2. In the **Status** box, click the drop-down arrow, and then select **Closed** from the list.

3. Click **Save**.

Working with Defects

A defect is a record describing a problem in a product or process. It is similar to a ticket, but people involved in the design or construction of the product typically resolve defects. The system tracks defects so that problems with a product or process can be resolved in a timely manner, and company management is aware of issues with these products or processes.

Adding a Defect to an Existing Ticket

When you discover a problem in a product or process, you can add a defect to Sage SalesLogix.

Our scenario:
After receiving Tom Dale's printer you discovered that there is a defect with the cooling fan. You need to enter a defect to track the problem.

To add a defect to an existing ticket

1. Open Tom Dale's ticket.
2. Click the **Defects** tab. If the tab is not visible, click the **More Tabs** tab.
3. Click the **Create Defect** button.
4. Click the **Project** drop-down arrow and select **Hardware**.
5. In the **Version Found** box, click the drop-down arrow,and select **1**.
6. In the **Target Version**, click the drop-down arrow, and select **2**.
7. In the **Current Progress** box, click the drop-down arrow, and select **Customer Return**.
8. In the **Area** box, click the **Find** button and in the **Area** list select **Hardware**.
9. In the **Category** list, select **Printer**.
10. In the **Issue** list, select **Power**, and then click **OK**.
11. Leave the **Status** as **Open**.
12. In the **Source** box, click the drop-down arrow, and select **Parts**.
13. In the **Type** box, click the drop-down arrow, and select **Power**.
14. In the **Priority** and **Severity** boxes, click the drop-down arrow, select the importance and impact of the issue.
15. In the **Frequency** box, click the drop-down arrow,and select **Weekly**.
16. Select the **Submit for SpeedSearch** option so that this issue can be found using SpeedSearch.
17. In the **Public Access** box, select **5-internal**.
18. Click the **Assigned To Find** button , select your name from the list, and then click **OK**.
19. In the **Subject** type **Printer fan stops and printer overheats**.

20. In the **Description** box, click the **User Date Stamp** button, and then type **Cooling fan stops which causes the printer to overheat and turn off during a print job**.
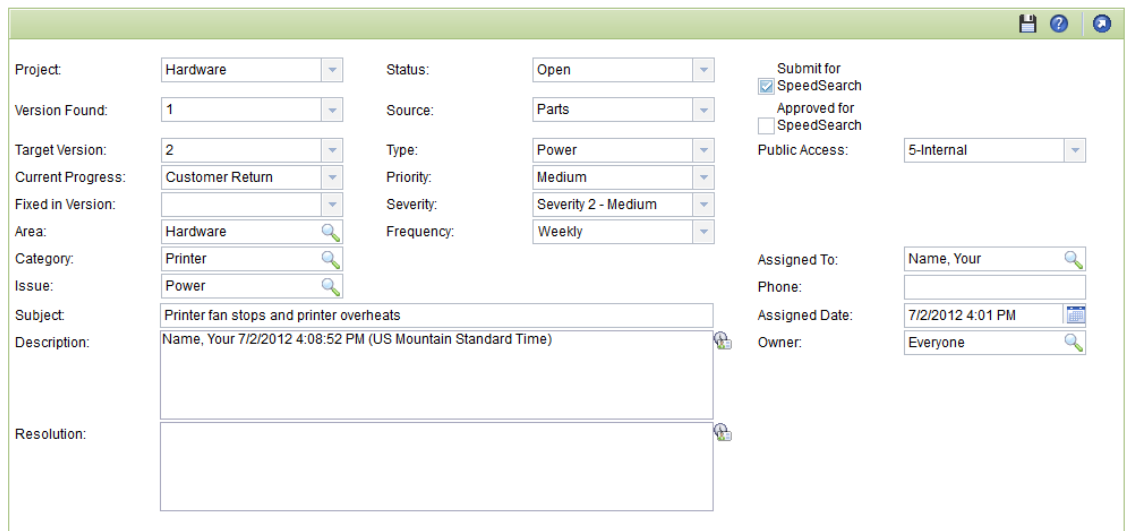

Figure 17 Insert Defect view

21. Click **Save**.

To associate a product to a defect

1. In the Defect Detail view, click the **Products** tab. If the tab is not visible, click the **More Tabs** tab.

2. Click the **Associate Product** Associate Product button.

3. Use the lookup to find **NetPrinter Laser Elite**.

4. Click **Add Selected**.

Closing a Defect

The stage at which a defect is closed and the person responsible for closing the defect depend on the process within your company.

Our scenario:

The problem with the NetPrinter Laser Elite fan has been identified. You are ready to add a resolution and close the defect.

To close

1. Open the defect you created for the **NetPrinter Laser Elite**.

2. In the **Fixed in Version** box, click the drop-down arrow and select an item from the list.

3. In the **Status** box, click the drop-down arrow, and then select **Closed**.

4. Click the **Details** tab.

5. In the **Resolution** box, click the **User Date Stamp** button, and then type **Fan is too small. Any printers experiencing this problem should be returned and the fan**

will be replaced.

6. Click **Save**.

Chapter 8
Using Web Reporting and Analysis Tools

Sage SalesLogix includes reporting and analysis tools that help you identify opportunities and evaluate sales effectiveness.

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.

The 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 the corrective actions or make strategic decisions.

In this chapter, you will learn to:

- Use the Reports view
- Run a report
- Create and save a report filter
- Export and print reports
- Work with Dashboards
- Use Dashboard widgets

Using the Reports View

Reports enable you to view information about contacts, accounts, opportunities, tickets, and other related data.

The Reports view allows you to select from a list of available reports and apply filters to narrow the results. You can only access reports that have been released to you by the system administrator. Reports can be released to you personally, or to a team that you are a member of. When you view or print any report, only records you have access to are included in the report.

Our scenario:
You want to run a report listing all the interactions you have had with your contacts.

To run a report

1. On the Navigation Bar, click **Reports**.

2. In the **Select the type of report** list, select **Contact**.

3. In the **Select the name of the report** list, select **Contact Summary - Sample**.

4. Next to **Show records that match**, click **Edit**.
   The screen expands to show additional boxes.

5. In the **Conditions Match** box, select **All**.

6. In the **Match by** list select **Group**, and then in the **Group Name** list, select **My Contacts**.

7. Click the plus sign to add the condition.

8. Click **View Report**.

9. In the **Enter Values** dialog box, choose whether you would like to include notes and whether you would like each contact to display on a separate page.

10. Click **OK**.

11. In the report preview you can:
    * Use the tree view in the left pane to view specific pages in the report.
    * Use the arrow buttons to move to the next, previous, first, and last pages.
    * Print the report.
    * Export the report to a variety of supported file formats.

Exporting and Printing Reports

When you run a report, you can choose to preview it in the Sage SalesLogix Crystal Report Viewer before printing it. From the Viewer, you can print or export, adjust your on-screen view, and search for text in a report.

> You must allow pop-ups before you can export or print a report.

To export a report

1. From the Report Viewer, click the **Export** button on the toolbar.
    The Export the Report dialog box displays.

2. In the **File Format** drop-down box, select the format and destination of the report.

3. Select one of the **Page Range** options for the number of pages you want to export. Select **All** to print the entire report, or select the **Pages** option and enter the first page number in the **From** box, and then enter the last page number in the **To** box.

4. Click **OK**.

To print a report

1. From the Report Viewer, click the **Print** button on the toolbar.

2. Select one of the **Page Range** options for the number of pages you want to print. Select **All** to print the entire report, or select the **Pages** option and enter the first page number in the **From** box, and then enter the last page number in the **To** box.

3. Click **OK**. Acrobat Reader opens and displays the report you selected.

4. Select the Open option, and then click OK.

5. Click the Acrobat Reader **Print file** button. If the report does not print correctly, you may need to reformat it for your printer. The report orientation settings will override the orientation in the printer settings.

# Working with the Dashboard

The Dashboard allows you to display and interact with a variety of performance and analysis tools on the Welcome page of the Sage SalesLogix Web Client. You can maintain one or more personalized dashboard tabs and, with the appropriate permissions, you can modify dashboards provided by Sage or customized by your administrator.

You can format the data on the dashboard using widgets to gain insight into organizational and individual performance. The data can be visualized in a pie, bar or column chart, pipeline, or line graph, or you can view the detailed data in a list. For more information about widgets, see See "Working with Widgets" on page 64.

There are two out-of-the-box dashboard tabs: My Dashboard and Sales. Each tab has several out-of-the-box widgets. You can add and edit widgets to display different data or display the same data in different ways.

To open the dashboard

- On the Navigation Bar, click **Welcome**.
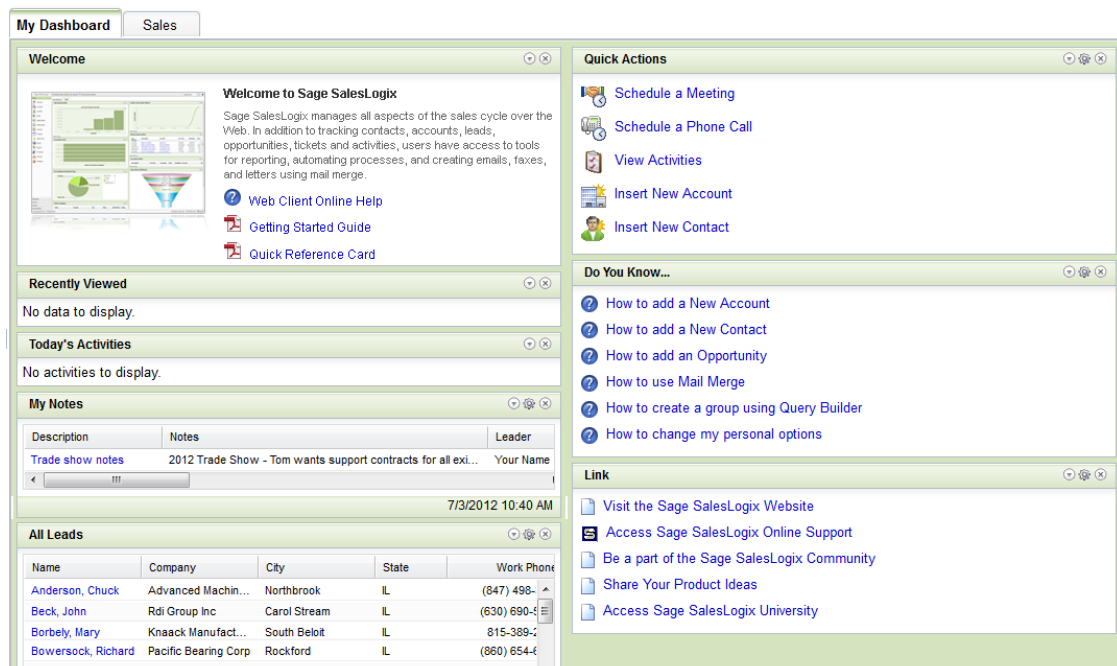
Customizing Your Dashboard

Use the context menu on a dashboard tab to add a new tab, copy, hide/show and delete tabs, or share tabs with your team or department. Use drag-and-drop to rearrange the widgets on the tab. Widgets automatically size to fit the data and chart type, as well as the column size.

You can also send all the data for a group from a list view to a group list widget on the dashboard with the Promote to Dashboard link.

To add a new tab

1. Right-click any dashboard tab, and click **New Tab**.
2. In the **Title** box type a name for the tab.

3. If necessary, select the template that describes the type of layout you want to use for your tab.

4. Click **OK**.

To share a tab with other users

1. Right-click the dashboard tab, and click **Share Tab**.

Do one of the following:

- Click **Everyone** to share the tab with all users.

- Click the **Add** button, find the users, teams or departments you want to share the tab with, and then click **OK**.

To promote a group to a dashboard

1. From a list view, click the group tab you want to send to the dashboard.

2. In the Task Pane, click **Promote to Dashboard**.

3. Click the name of the dashboard where you want to send the data, and click **OK**.

4. Click **OK**.

5. Click **Welcome** in the Navigation Bar and select the dashboard tab you selected in step 3.
   The data appears on the dashboard in a group list widget. The default configuration for the group list is 10 lines; however you can change this in the widget editor to display up to 50 lines.

Working with Widgets

Widgets are plug-ins you can add to a dashboard. There are several types of widgets you can use to display your data. Move your mouse over the chart in a widget to display the dimension and metric selected for that widget.

There are several types of widgets:

- Charting - Bar, Column, Funnel, Line, and Pie charts

- List - Group, Links, and Recently Viewed

- Other - Today's Activities and Welcome

Using Widgets

You can add, edit, and remove widgets from the dashboard, and you can rearrange widgets on the page with drag-and-drop.

Our scenario:
You want to show potential revenue of opportunities in your pipeline for each level of revenue.

To add a funnel chart widget

1. Right-click a Dashboard tab and click **Add Content**.

2. Click the **Add** button under **Funnel Chart**.

3. Type a **Title** for the funnel chart, for example **Open Opportunities by Sales Potential**.

4. In the **Entity** list select **Opportunity**.

5. In the **Group** list select **All Open**.

6. In the **Dimension** list select **Stage**.

7. In the **Metric** list select **Sum Sales Potential**.

8. Determine if you want to **Display Labels**, **Truncate Labels** and what the **Label Length** is.

9. Click **OK**.
A range of sales potential amounts displays with each sales potential range represented as a different colored level. The size of each level represents the number of opportunities within a particular sales potential range.

To add content to a widget

1. Right-click the **My Dashboard** tab, and click **Add Content**.

2. On the **Add Content** dialog box, click the **Add** button for the widget you want to add.

3. Configure the widget settings, and click **OK**.

To edit a widget

1. On the widget toolbar, click the **Settings** button.

2. Make the changes necessary.

3. Click **OK**.
The widget displays the changes.

To minimize a widget

- On the widget toolbar, click the **Minimize** button.
The widget content is minimized in the dashboard. Click the button again to maximize the widget.

To remove a widget

- On the widget toolbar, click the **Close** button.
The widget is permanently removed from the dashboard.

Setting User Options

Sage SalesLogix provides tools to allow you to modify some parts of the interface so that you can work in the way that suits you best. User Options allow you to set specific preferences for such features as the view that appears when you start the Sage SalesLogix Web Client and Alerts. Your settings that you enter are recorded for you and are not visible to other Sage SalesLogix users. Some options are shared between the Sage SalesLogix Client and Sage SalesLogix Web Client.

General Options

Use the General tab to specify such settings as which view opens by default when you first log into Sage SalesLogix Web Client, and who to use as the default owner for any new records you create. You can also set options for using Mail Merge, although these will not be visible unless you installed Desktop Integration. See "Understanding Sage SalesLogix Desktop Integration " on page 10.

To set general options

On the **Tools** menu, click **Options**.

Click the **General** tab.

In the **Show on Startup** box, select the default view you want to display when you log in to the Web Client, (for example, What's New or Calendar).

In the **Default Owner/Team** box, click the **Find** button, select the user or team you want to be the default owner for new accounts, and then click **OK**.

If you want to be automatically logged out of the Web Client after a period of inactivity, select the **Enable Automatic Logoff** option, and then type the allowable number of minutes of inactivity.

If you want to be notified when you have unsaved changes on a page, select the **Prompt for unsaved data** check box. This option is selected by default. Clear the check box if you do not want to be notified.

If you need updated pick list data, click the **Refresh Pick List Data** button.
You should only click this button if there are updated pick list items available. For example, the Opportunity Status pick list has been updated.

For Multi-Currency only: To select a currency type, click the **My Currency Find** button, select a currency from the list, and then click **OK**.

(Intellisync Only) In the **Intellisync Contact Group** box, select an ad hoc contact group for the sync process to occur.
If the ad hoc group you want to sync your contacts to does not appear in the list, you must create the SyncSalesLogix group. For more information see the "Intellisync for SalesLogix" topic in the Sage SalesLogix Web Client help.

Select the **Display List view check boxes** option if you want all of your list views to include a column of check boxes.

Select the Mail Merge Base Templates you want to use when creating a new contact e-mail, fax, or letter template.

    a. Click the **Type** drop-down arrow and select **Contact**.

    b. Click the **E-mail Base Template Find** button.

    c. Select a template and click **OK**.

    d. Repeat steps b-c for **Letter Base Template** and **Fax Base Template**.

Select the Mail Merge Base Templates you want to use when creating a new lead e-mail, fax, or letter template.

> When selecting templates for leads select only templates that end with "(Lead)".

    a. Click the **Type** drop-down arrow and select **Lead**.

    b. Click the **E-mail Base Template Find** button.

    c. Select a template and click **OK**.

    d. Repeat steps b-c for **Letter Base Template** and **Fax Base Template**.

In the **Write Menu - Recent Templates** box, enter the number of templates you want to display in the most recently used templates list.

In the **Fax Provider** box, click the drop-down arrow and select the fax provider you want to use for faxing.

In the **Log to History** box, select **Prompt** if you want the **Complete E-mail** dialog box to display after you drag and drop an e-mail message. If you want the message to be recorded to history without prompting, select **Do Not Prompt**.

> This option only applies to dragging and dropping e-mails. You must set options for Send SLX and Record to History in the Desktop Manager. See"Configuring Desktop Integration E-mail Options" on page 12.

16. Click **Save**.
    You must click Save on each tab or your option selections will not be saved

Group Options

Use the Groups options tab to determine how your groups, list views and lookups will appear and behave. These options only apply when the current user is logged in to the Sage SalesLogix Web Client.

To set group options

1. On the **Tools** menu, click **Options**.

2. Click the **Group** tab.

3. Set your **Group Options**.

    a. Click the **Main View** drop-down arrow and select a view from the list.

    b. Click the **Default Group** drop-down arrow and select a default group from the list. For example, Latest Contacts.

> The default layout for new groups is determined by the group selected as the default group.

    c. Click the **Default Lookup Layout** drop-down arrow and select the name of the group with the layout you want to see for any lookups on that main view. For example, on the Contact views, all lookups will use the Latest Contacts group layout.
The group you select will also determine what search items are available in the Lookup. The Lookup by options depend on the columns included in the layout of the lookup. You should choose a group that includes all of the columns you may want to search by in a lookup.

    d. Repeat steps a-c for each main view.

4. Under **General Lookup Options**, click the **Default Lookup Condition** drop-down arrow and select the lookup condition you would like to use for all list view lookups. Options include: Starting With, Contains, Equal to, and Not Equal to.

5. Select **Auto-fit Columns** to resize columns to fit within the available space, or clear the option to maintain the column size and allow scrolling to view columns that do not fit in the available space.

6. Click **Save**.
You must click Save on each tab or your option selections will not be saved

Activities Options

Use the Activities tab to set defaults such as activity type.

To set activity options

1. On the **Tools** menu, click **Options**.

2. Click the **Activities** tab.

3. From the **Default View** drop-down list, select the tab name for the type of activities you want to display in the Activity Main view (for example, All Open).

4. In the **Default Follow-up Activity** drop-down list, select the type of activity to be scheduled as a follow-up, after you complete an activity.

5. In the **Carry Over Notes** drop-down list, select **Yes** if you want to carry over any existing notes. when you schedule a follow-up activity.

6. In the **Carry Over Attachments** drop-down list, select **Yes** if you want to carry over any existing attachments when you schedule a follow-up activity.

7. Select **Display Past Due in the toolbar** if you want to be notified of past due activities.

8. Under the **Defaults Per Activity Type** section, set the Default Alarm and Default Duration for each activity type:

    a. Click the **Default Alarm** drop-down arrow and select from the list to set the default alarm when scheduling a new meeting.

    b. Click the **Default Duration** drop-down arrow and select from the list to set the default duration when scheduling a new meeting.

    c. Select the **Default Timeless** option if you want an activity to be timeless by default.

    d. If you selected the **Default Timeless** option and you want activities to automatically rollover to the next day if they are not completed on the scheduled date, then select the **Auto Rollover** option.

    You can only rollover timeless activities.

    e. Repeat steps a-d for Phone Call, To Do, and Personal Activity.

9. Click **Save**.
    You must click Save on each tab or your option selections will not be saved

Setting Calendar Options

Calendar Options allow you to adjust the content and appearance of your calendar to accommodate the way you work. You can set the type of information that displays in activities, the start and end of the work day, the default calendar view, default interval on the calendar, and whether or not completed activities (history) items display. History items only display on the day and week calendars by default.

To set calendar options

1. On the **Tools** menu, click **Options**.

2. Click the **Calendar** tab.

3. In the **Default Calendar View** box, click the drop-down arrow and select the default calendar view you want to display when you open the Calendar view.

4. In the **Num of Events on Day/Week** box, click the drop-down arrow and select the maximum number of events that you want to display in the top part of the Calendar Day and Week views.

5. In the **Show History on Calendar** box, click the drop-down arrow and select **Yes** to display history items or **No** if you do not want history items to display on the Calendar Day view.

6. In the **Remember Selected Users**, click the drop-down arrow and select **Yes** if you display multiple users on your calendar view and want to save the list of users between sessions.

7. Set the **Show on Activities** options to define how activities are displayed on the Calendar timeline for day and week views. These options do not apply to the month view.

    ● **Opportunity** - Displays an activity's opportunity information, if applicable, on the day and week calendar views.

    ● **Phone Number** - Displays an activity's phone number information on the day and week calendar views.

    ● **Regarding** - Displays an activity's regarding information on the day and week calendar views.

    ● **Time** - Displays the activity's start and end times on the day and week calendar views.

8. Under **Work Week**, select the days of the week that are included in your work week.

9. In the **First Day of the Week** box, click the drop-down arrow and select the day on which your work week starts.

10. Set the following options to customize your calendar:

    a. **Contact/Account** - Select how you want contact and account information to display on the Calendar. This option does not apply to the month view.

    b. **Day Start** - Select the time that your workday begins.

    c. **Day End** - Select the time that your workday ends.

    d. **Default Interval** - Select whether the calendar displays information in 15, 30 or 60 minute intervals.

    e. **Default Activity Type** - Select a default activity type. This is the type of activity that will be created when you double-click on any of the Calendar views.

11. Click **Save**.
    You must click Save on each tab or your option selections will not be saved

Alerts Options

Use the Alerts tab to set defaults to determine how you will be alerted for alarms and new unconfirmed activities.

To set alerts options

1. On the **Tools** menu, click **Options**.

2. Click the **Alerts** tab.

3. Select **Display in toolbar** if you want Alerts to appear in your toolbar

    If you do not select this option, then the remaining check boxes will be unavailable and you will not be notified of your Alerts.

4. Select **Prompt** if you want the Alerts dialog box to display when you have new alerts.

5. Next to **Include**, select the information you want to include in your Alerts. If you selected Prompt, this is the information that will cause the Alerts dialog box to open:

> If you do not select any options, and you selected to display or prompt for Alarms, then your Alerts will be empty and will not prompt.

- Select **Alarms** if you want your alarms to display in your Alerts.
- Select **Unconfirmed Activities** if you want your unconfirmed activities to display in your Alerts.

6. Click the **Default Snooze** drop-down arrow and select from the list to set the default amount of time to postpone an activity alarm. You can still change the snooze time from the Snooze list before you snooze your alarms.

7. Click **Save**.

Opportunity Options

Use the Opportunities tab to specify default settings for any new opportunities that you enter into the Sage SalesLogix Web Client. These options only apply when the current user is logged in to the Sage SalesLogix Web Client.

To set opportunity options

1. On the **Tools** menu, click **Options**.

2. Click the **Opportunities** tab.

3. In the **Opportunity Description** area, select **Use default name conventions** if the default names will be controlled by a script. A sample Opportunity Description will appear in the space below the check box. Contact your administrator if you are unsure whether or not you should select this item.

4. In the **Opportunity Status** box, click the drop-down arrow and select from the list. (The default setting is Open.)

5. In the **Opportunity Type** box, click the drop-down arrow and select from the list. (This setting is blank by default.)

6. From the **Probability** drop-down list, click the drop-down arrow and select a probability of close that will be the default for new opportunities. This option is ignored if you choose a Sales Process in step 9.

7. To set the estimated close date for the new opportunities you create, select the number of months in the **Set estimated close date to** x **months after opening** drop-down list. You can select from 0 to 36.

8. If you want opportunities to close at the end of the month selected in the preceding step, select the **Initially change estimated close to last day of month** check box.

9. Select a process from the **Sales Process** list. The list consists of all released sales processes. The default setting is blank.

> The Default Sales Process box will be unavailable if the SalesLogix Advanced bundle is not installed.

10. In the **Default Contact(s)** area you can determine which contacts should be added to new opportunities by default. Default Contact options are:

- Add all contacts associated with account
- Add only the account's primary contact
- Add no contacts

11. For **Multi-Currency** only: Click the **Default Currency Find** button to select from the list.

12. To include products for all new opportunities by default, click the **Products** button, to open the Add Product dialog box.

> This option is not available if Accounting Integration is configured.

13. Click **Save**.
   You must click Save on each tab or your option selections will not be saved

Changing Your Password

You can change your password through the Options in the Sage SalesLogix Web Client.

To change your password

1. On the **Tools** menu, click **Options**.

2. Click the **Password** tab, type your password in the **Current Password** box.

3. In the **New Password** box, type your new password.

4. Retype your new password in the **Confirm Password** box.

5. Click **Save**.

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