

## SAGE CRM SALESLOGIX

## Customer Service

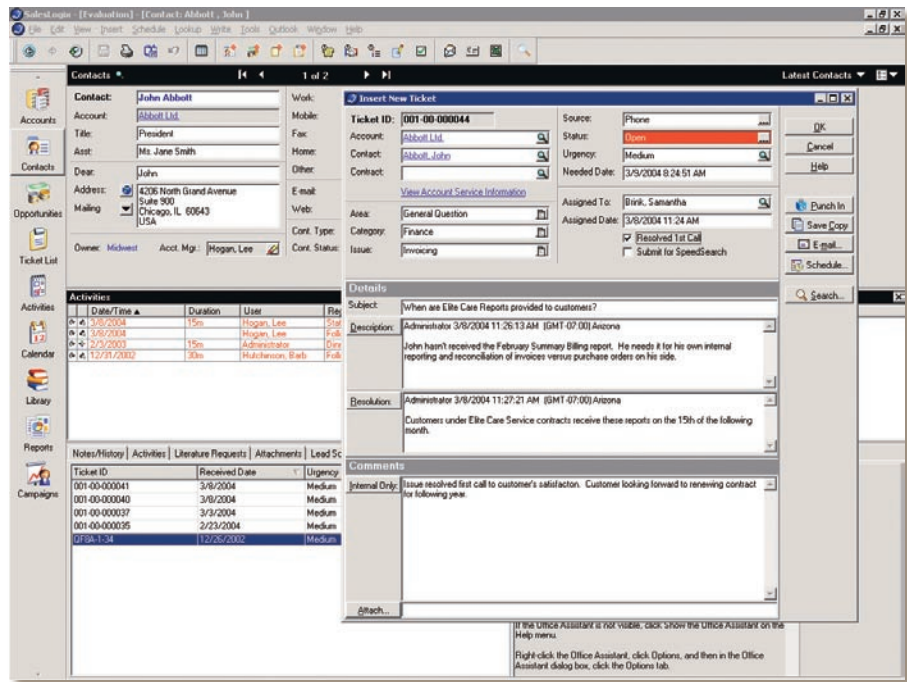
- SALES
- MARKETING
- CUSTOMER SERVICE
- SUPPORT

Sage CRM SalesLogix Customer Service is a component of the integrated Sage CRM SalesLogix customer relationship management (CRM) suite, which also includes Sales, Marketing, and Support solutions.

### FEATURES

Sage CRM SalesLogix Customer Service delivers powerful issue tracking and resolution tools to maximize customer satisfaction and loyalty.

- Ticket Management
- Service Contract Management
- SpeedSearch/Knowledge Base
- Activities and Communications
- Reporting
- Notification and Alerts
- Web Customer Portal
- Back-Office Integration
- Integrated CRM Benefits
- Configuration and Workflow
- Windows, Web, and Wireless



Create service tickets quickly and automatically assign them to the appropriate resource based on area and level of expertise.

### Track and Resolve Customer Questions, Issues and Requests

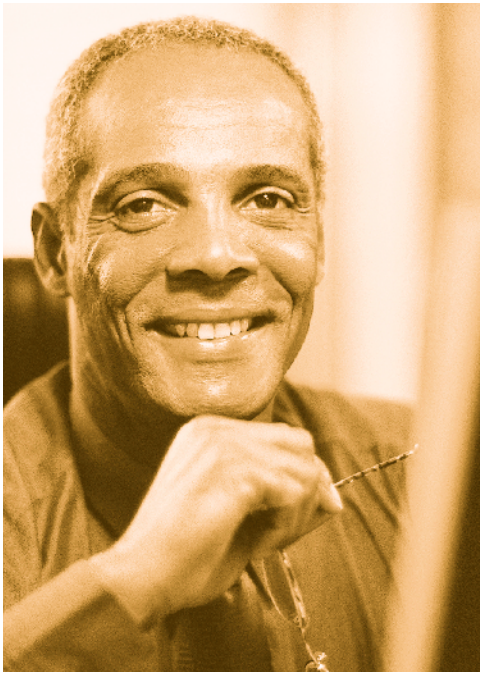
Sage CRM SalesLogix Customer Service provides the advanced issue tracking and resolution tools needed to quickly resolve customer questions, issues and requests, and deliver a high-quality customer experience. Each service ticket created contains detailed information including a unique ticket ID number, contact info, type, status, urgency, assignment, date required, and service contract details.

From within a ticket, employees can search for solutions or schedule activities such as phone calls, meetings, or to-dos to follow up on open issues. Service reps can also easily communicate with customers by sending e-mail with attachments such as white papers, quotes, or product info. Tickets are associated with Accounts and Contacts, so a record of all service interactions, past and pending, is maintained in Sage CRM SalesLogix and can be viewed by employees from across your organization.

### Find Critical Information and Resources Quickly

SpeedSearch, the powerful knowledge base search engine in Sage CRM SalesLogix, helps service professionals quickly locate resolutions to customer issues. Service reps can search prior tickets, attachments, standard problems and resolutions, procedures, activities, and notes, as well as reference materials such as online manuals, FAQs, and white papers. In fact, an advanced keyword search can be run against any information in Sage CRM SalesLogix or on a shared company network directory.

With SpeedSearch, service reps can scan search results rapidly and efficiently, due to advanced filtering, scoring, sorting, and preview capabilities. When the desired resolution is identified, service reps can populate it into the ticket, communicate it to the customer, and record it in the account history with only a few clicks. When successful new resolutions are identified, employees can easily input and submit them to the knowledge base for future reference.



## PRODUCT BENEFITS

- Resolve customer questions, issues and requests quickly for a high quality customer experience
- Retain critical intelligence to increase departmental effectiveness and customer satisfaction
- Capitalize on new selling opportunities
- Provide convenient self-service solutions to customers
- Share information captured at all points of interaction for a holistic customer view

## Manage for Maximum Productivity

The reporting capabilities in Sage CRM SalesLogix Customer Service help managers capture and analyze customer service metrics to assess team effectiveness. Managers can view call turn-around time, first-call resolution percentage, issue totals by category, escalation history, unresolved issues, and a weekly recap. Sage CRM SalesLogix automatically tracks time spent resolving individual issues, based on when users “punch-in” and “punch-out” of individual tickets. Sage CRM SalesLogix can also monitor tickets proactively based on business criteria you define, and send automatic alerts when service conditions occur such as overdue tickets, expiring service contracts, or issue escalations.

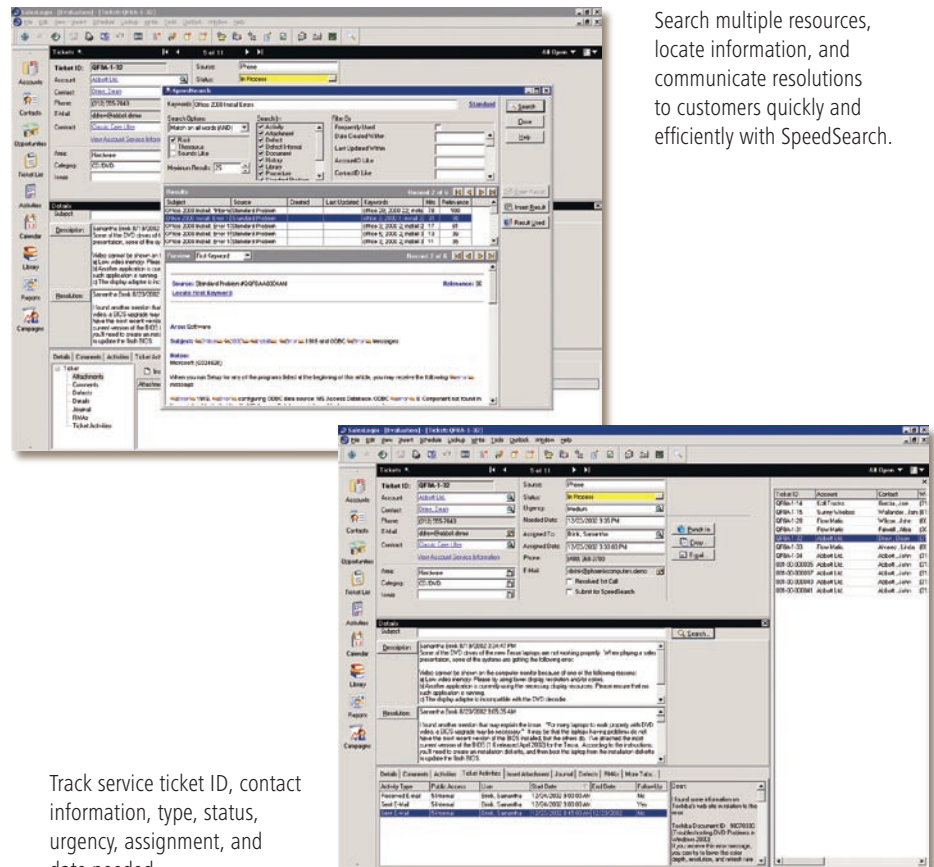
## Help Customers Help Themselves

Sage CRM SalesLogix helps reduce costs while empowering customers to find the answers they need—online at their convenience. With the Sage CRM SalesLogix Web Customer Portal, customers can view, add or edit tickets, and submit comments or attachments. The Web Customer Portal puts the same resources and intelligence used by your service professionals on your Web site, along with powerful search technology that simplifies the self-service experience.

## Integration for a Complete Customer View

Sage CRM SalesLogix integrates with leading back-office applications so service reps can access key customer information such as credit status, balance, and terms, as well as reference prior orders, invoices, payments, and shipping info. Service professionals can also view current product information, pricing, and discounts to capitalize on potential cross-sell and up-sell opportunities when interacting with customers.

Sage CRM SalesLogix Customer Service is highly flexible and can be tailored to work in concert with your existing business processes. And because Sage CRM SalesLogix captures information from all points of customer interaction, employees from Sales and Marketing to Service and Support benefit from a holistic view of every customer.



Search multiple resources, locate information, and communicate resolutions to customers quickly and efficiently with SpeedSearch.

Track service ticket ID, contact information, type, status, urgency, assignment, and date needed.

## Features

### Ticket Management

- Track ticket ID, contact info, type, status, urgency, assignment, and date needed
- Schedule phone calls, meetings, or to-dos to follow up on open issues
- Send e-mail with attachments and record correspondences to activity history
- Automatically assign tickets to the appropriate resource based on area, skill, etc.
- Submit issue descriptions and resolutions for archival in the knowledge base
- Create ticket groups, lookups, and reports for segmentation and analysis of issues

### Service Contract Management

- Track contract details such as service level, price, and time or dollars remaining
- Validate authorizations for specific services and log issues against a contract
- Associate tickets with contracts to automatically update remaining balances
- "Punch-in" and "Punch-out" automatically to track time spent on individual tickets

### SpeedSearch/Knowledge Base

- Perform an advanced keyword search of any Sage CRM SalesLogix table or shared network directory
- Reference prior tickets, attachments, standard problems and resolutions, activities, and notes/history
- Search reference materials such as online manuals, FAQs, or white papers
- Scan search results efficiently with advanced filtering, scoring, sorting, and preview capabilities
- Populate resolutions automatically into service tickets with one click
- Archive approved resolutions in the knowledge base for future reference

### Activities and Communication

- Schedule and track phone calls, meetings, to-dos, events, and literature requests
- Send e-mail and attachments using Microsoft Outlook and record to customer activity history
- Attach white papers, quotes, product info, and other resources from the library

### Reporting

- Measure call turn-around time, first-call resolution percentage, and more
- View issue totals by category, escalation history, unresolved issues, and a weekly recap

### Notification and Alerts

- Monitor data proactively and receive alerts when service conditions are triggered
- Notify service managers of overdue tickets or escalated issues requiring attention
- Alert customer service and support staff of expiring service contracts
- Receive alerts instantly via e-mail, fax, pager, PDA, phone, or Web browser

### Web Customer Portal

- Empower customers to view, add, or edit tickets, and submit comments or attachments
- Enable search capability of the same knowledge base that service reps use

### Back-Office Integration

- View accounting data such as credit status, activity, A/R balance, aging, and terms
- Access current product information, inventory, pricing, and discounts
- Reference orders, invoices, payments, and shipping info within customer records

### Integrated CRM Benefits

- Arm sales reps with a history of their customers' service issues and details
- Enable managers to view problem descriptions and follow-up with a call or letter

### Configuration and Workflow

- Define user workflow options or grant ability to modify at user level
- Automate user/date time stamps, ticket punch-in/out, ticket number, and assignment
- Configure e-mail workflow, escalation conditions, and notification routing

### Windows, Web and Wireless

- Synchronize rapidly and work offline, or work online over a network or the Web
- Utilize wireless phones for quick access to customer data in the field



*"The new Sage CRM SalesLogix Customer Service functionality in version 6.2 enables our employees to quickly resolve customer issues and requests, resulting in increased productivity and a high level of customer satisfaction."*

Ben Holcombe  
Concurrent Computer Corporation



# Sage CRM SalesLogix

## Customer Service

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### About Sage CRM SalesLogix

Sage CRM SalesLogix is the customer relationship management solution that enables small to medium-sized businesses to cultivate profitable customer relationships by increasing sales and marketing performance and maximizing customer satisfaction and loyalty.

Designed to meet the distinct needs of small to medium-sized businesses, Sage CRM SalesLogix delivers integrated Sales, Marketing, Customer Service, and Support automation solutions that adapt to your unique customer acquisition, retention, and development processes.

Sage CRM SalesLogix provides a complete CRM solution with low cost of ownership, rapid time to productivity, and high return on investment. Flexible and easy to use, Sage CRM SalesLogix readily accommodates growth and changing business requirements.

Sage CRM SalesLogix, the SMB CRM leader with more than 7,000 customers worldwide, is part of the Sage Software family of integrated business management solutions.

### About Sage Software

Sage Software has been responding to the needs, challenges, and dreams of small and midsize businesses like yours for over 25 years. With a complete range of business management solutions and services, Sage Software helps companies improve customer relationships, reduce costs, and automate and integrate a variety of operational activities. Look to Sage Software for fully integrated business management applications that deliver high performance, advanced functionality, cross-product integration, and unmatched freedom of choice.

Sage Software solutions support the specialty needs of a broad scope of industry segments, including manufacturing, distribution, construction, real estate, nonprofit, and professional services. Today, over 2.4 million North American customers run Sage Software solutions. Its parent company, The Sage Group plc (London: SGE.L), supports 4.5 million customers worldwide and has revenues exceeding \$1 billion. Together, with its network of business partners, Sage Software provides the ongoing support and service small and midsize businesses need to achieve tangible business results.

For more information, please visit the Web site at [www.sagesoftware.com](http://www.sagesoftware.com) or call **800-854-3415**.

For more information, go to:

[www.saleslogix.com](http://www.saleslogix.com)

Or contact your certified Sage CRM SalesLogix Business Partner. To find a Business Partner in your area, call **800-643-6400**.

To register for an online demonstration to see how Sage CRM SalesLogix can help your business, go to:

[www.saleslogix.com/demo](http://www.saleslogix.com/demo)