



## Sage SalesLogix | Customer Service Solutions

To deliver differentiating customer experiences that build loyal, profitable customer relationships, customer service and support teams must respond quickly and knowledgeably to inquiries or issues. Sage SalesLogix provides your customer service and support teams with a complete view of all customer interactions so they can better service, support, and sell to prospects and customers. They can quickly resolve customer issues and requests and deliver a high-quality customer experience with access to ticket, return, defect, and contract management tools. You can even provide your customers with convenient self-service options—empowering customers to find the answers they need or submit tickets and requests 24/7. Plus, Sage SalesLogix is highly flexible and can be tailored to work in conjunction with your existing business processes, streamlining departmental efficiencies.

### Get a Complete View of Your Customer

View all customer interactions across all departments in a single, easy-to-use interface that gives you and your team the details needed to provide outstanding service and support to customers. All customer interactions, including notes, purchased products, returns, marketing campaigns, tickets, and more, can be viewed and shared. And, you can integrate with your back-office solutions, such as accounting software, so your team has access to vital back-office customer information such as order history, payments, open invoices, inventory, and shipping information.

### Maximize Team Performance and Service Levels

Gain a deeper understanding of your team's performance as well as service and support levels using reporting, advanced business analytics tools, and escalation alerts. Quickly create reports to understand call turnaround times, follow-up statistics, escalated tickets, unresolved tickets, and much more—so you can take action fast. Integrate with Sage SalesLogix Visual Analyzer, an advanced business analytics tool, for an instant picture of service levels so you can quickly analyze ticket volume and trends to assess the customer experience. You can also automatically receive alerts via phone, e-mail, or pager when critical events occur so you can take appropriate action



- Provide high levels of service and support with access to all the tools and resources you need—including a timeline that visually shows ticket activity and events over a period of time.

### BENEFITS SNAPSHOT

Get a complete view of the customer, maximizing interactions.

Resolve customer issues quickly with fast access to the tools and information you need.

Gain insight into team performance using business analytic tools.

Receive alerts automatically so you're always aware of urgent issues.

Gather and retain critical intelligence to increase departmental effectiveness and customer satisfaction.

Provide customers with convenient self-service options.

Boost customer service and loyalty levels by providing a differentiating customer experience.

## Manage Tickets and Contracts to Increase Service Levels

Leverage ticket management tools and resources needed to boost customer service and loyalty levels. Each service ticket created contains detailed information including a unique ticket ID number, contact information, status, urgency, assignment, and more. Your team can maximize productivity when you respond to customers quickly by sending e-mails with attachments, such as white papers and product information from within Sage SalesLogix. And, track service contract details such as service level, price, and time or dollars remaining so all employees in your organization are armed with important information while servicing or selling to customers.

## Track and Manage Contracts to Increase Service Levels

Create and monitor defects and returns to ensure high levels of service. When a problem with a product or process occurs, your team can create a defect for tracking, assign it to another user, find a resolution, and more. Using return management tools, customer service and support reps can create, assign, update, and monitor returned assets—so they can keep your customers informed of the status if they inquire.

## Resolve Customer Issues Quickly

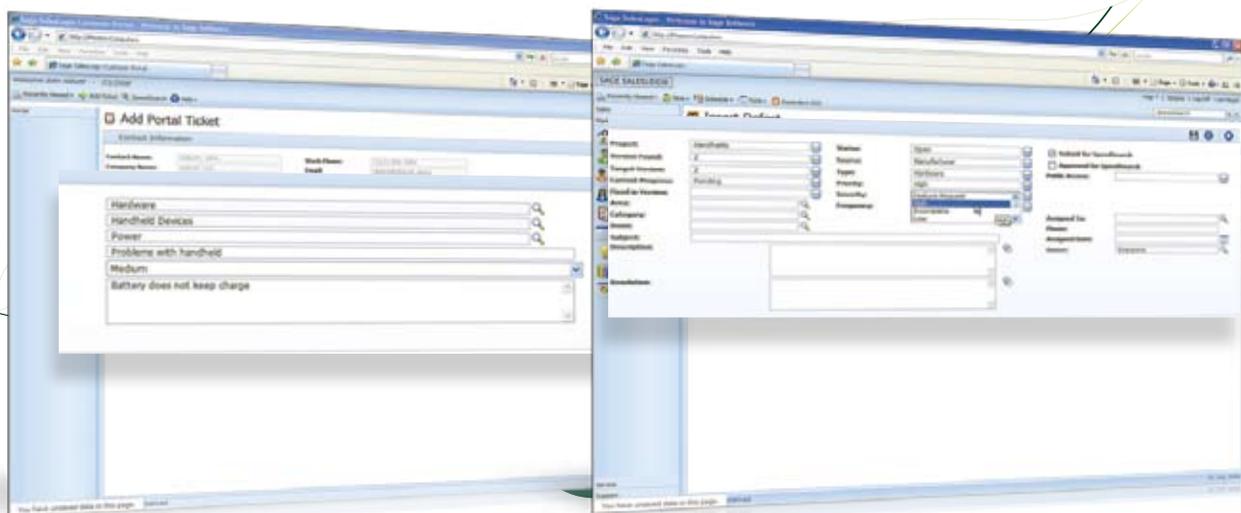
Locate resolutions to customer issues quickly and easily so you can provide high levels of service and support with Sage SalesLogix SpeedSearch—a powerful knowledge base search engine. You can search prior tickets, attachments, procedures, activities, and notes, as well as reference materials such as online manuals, FAQs, and white papers. With advanced filtering, sorting, and preview capabilities, you can scan search results quickly and efficiently.

## Provide Customers with Convenient Options

Empower your customers to get the support they need 24/7 with convenient self-service options—enhancing the customer experience and reducing service and support costs. Your customers can view, add, or edit tickets and submit comments and attachments via the Web—plus search your knowledge base for answers to their questions. And, tickets can be automatically distributed to your service and support reps based on your specific business processes and workflow—increasing productivity and reducing the time it takes to respond to customers.

**“The company’s focus has always been on satisfying the customer, but we didn’t have a system to support it. We wanted something more than sales force automation or contact management. We wanted a system to drive our operations and we found that in Sage SalesLogix.”**

**— Tom Mitchell,  
Director of Technology  
Services, Bordner  
Installation Group Inc.**



- Enable your customers to create and track support tickets and search for solutions online with the Sage SalesLogix Customer Web Portal.

- Create and manage defects with ease.



## FEATURES

### Account and Contact Management

- Access detailed information about the customers that your department supports.
- View ticket assignments, priority weightings, and notification requests.
- Link attachments and comments to records for historical reference.

### Ticket Management

- Track ticket ID, contact information, type, status, urgency, assignment, and date needed.
- Schedule phone calls, meetings, or to-dos to follow up on open issues.
- Automatically assign tickets to the appropriate resource based on area, skill, etc.
- Submit issue descriptions and resolutions for archiving in the knowledge base.

### Returns

- Ensure product returns are processed efficiently and accurately.
- Record defects, shipping instructions, serial numbers, attachments, and comments.

### Defect Tracking

- Track defect details including ID number, severity, priority, status, problem type, description, and source.
- View associated tickets, returns, attachments, and asset information.
- Provide a communication medium between support and product development departments.

### Asset Management

- Associate assets with accounts, tickets, defects, contracts, or returns.
- View information on product codes, names, vendors, and pricing.

### Service Contract Management

- Track contract details such as service level, price, and time or dollars remaining.
- “Punch-in” and “Punch-out” automatically to track time spent on individual tickets or support issues.
- Manage multiple contract types—per incident, time period, or dollar amount.

### SpeedSearch/Knowledge base

- Perform an advanced keyword search of any Sage 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.
- Populate resolutions automatically into service tickets with one click.
- Archive approved resolutions in the knowledge base for future reference.

### Calendar and Activity Management

- Manage schedules and keep track of activities and events for multiple users.
- Track phone calls, meetings, to-dos, events, and literature requests.

### Application Integration

- Manage contacts, e-mail, and calendars using Microsoft® Outlook®, Microsoft Exchange, or the built-in Sage SalesLogix e-mail solution.
- Integrate with leading back-office applications to access key customer information such as credit status, payment history, shipping information, inventory, pricing, discounts, and more.

### Lookups and Groups

- Use filters to quickly and easily identify relevant subsets of data and save as an ad-hoc group.
- Perform custom queries to locate records and update information.

### Reporting

- Capture data and analyze key customer service/support metrics to assess team effectiveness.
- 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.
- Receive alerts instantly via e-mail, fax, pager, PDA, phone, or Web browser.

Customer Self-service Web Portal

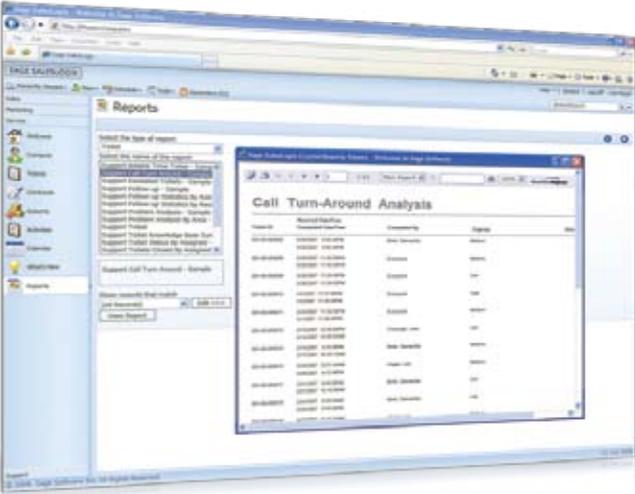
- Empower customers to view, add, or edit tickets and submit comments or attachments.
- Enable search capability of the same knowledge base that service reps use.

Configuration and Workflow

- Define user workflow options or grant the ability to modify at the 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 Mobile

- Synchronize rapidly and work while disconnected (using Windows, Web, or Mobile clients), or work while connected over a network or the Web.
- Utilize BlackBerry® or Windows Mobile® (Pocket PC and Smartphone) for quick access to customer data in the field.



“Because Sage SalesLogix delivers up-to-the-minute information, the customer service experience turns out positive, even if there’s a perceived ‘negative’ reason for the call. We know the exact status of that person’s account and how to help them.”  
 — Kevin Cantwell, President, Big River Telephone

- Robust reports provide you with a deeper understanding of team performance and customer service and support levels.

About Sage SalesLogix

Your highest priority is to grow your business, and your business tools should help you achieve that goal. Sage SalesLogix provides a complete view of customer interactions across sales, marketing, customer service, and support so your teams can collaborate and respond promptly and knowledgeably to customer inquiries and opportunities. With flexible access options, powerful process automation capabilities, and a highly customizable platform, Sage SalesLogix is a comprehensive solution that will help you achieve stronger sales and a more successful business, now and into the future.

About Sage CRM Solutions

Sage CRM Solutions is a portfolio of market-leading applications consisting of ACT! by Sage, Sage CRM, and Sage SalesLogix. Over 56,000 organizations and 3.1 million users worldwide rely on Sage CRM Solutions to develop profitable, long-term business relationships.

