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**Headline News**

Sage CRM SalesLogix was selected as a **Top 15 CRM Small & Medium Business Software** award winner for 2006. The award was presented by ISM Inc., Customer Relationship Management (CRM) and Real-Time Enterprise strategic advisors. This is the eighth straight year Sage CRM SalesLogix has received the ISM award.

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**Sage CRM SalesLogix  
Advanced Outlook Integration**

**M**ost of us don't have time for extra steps, nor the patience to record information in more than one place. When we've found a reliable, intuitive tool like Microsoft Outlook, we don't want to give it up. With the Advanced Outlook Integration feature of Sage CRM SalesLogix, you don't have to give up the email and calendar tool you've come to depend on to gain the powerful customer relationship management features of Sage CRM SalesLogix. In this article we'll take a closer look at the integration between two of your favorite tools.

**Record The History**

Sage CRM SalesLogix is the logical and ideal place to store all of your business communications such as contacts, meetings, and emails. It's the central location for all customer activity. By keeping the data here it can be easily shared among your sales, marketing, and customer service teams.

However, with some users sending email and scheduling meetings from Sage CRM SalesLogix and others from Outlook, how can you be certain Sage CRM SalesLogix data is always up to date?

With Advanced Outlook Integration, even the activity initiated in Outlook is collected in Sage CRM SalesLogix. As you manage your ac-

tivities within Outlook, those activities—including email attachments—are added to customers' histories in Sage CRM SalesLogix.

**Use Your Tool Of Choice**

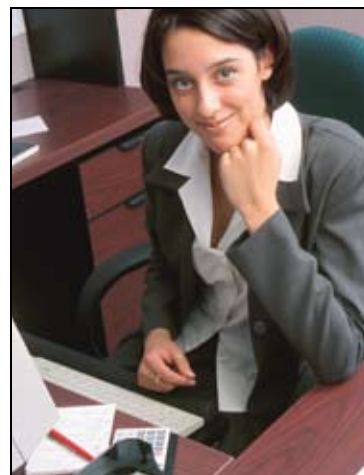
The Advanced Outlook Integration allows you to pick which tool you want to use to manage your email, calendars, and contacts.

You can create, update, and transfer data from Outlook to Sage CRM SalesLogix, or from Sage CRM SalesLogix to Outlook. Whichever tool you choose, the synchronization of Advanced Outlook Integration keeps both tools up to date.

Advanced Outlook Integration offers the ultimate flexibility. You don't have to choose a tool and commit to performing your activity in that tool. Use whichever program is most convenient.

Advanced Outlook Integration is ideal for businesses just starting with Sage CRM SalesLogix, as users don't have to learn a new email, activity, and calendaring system while they're mastering the other features of Sage CRM SalesLogix.

We've found that as users grow more familiar with Sage CRM SalesLogix, they begin adding critical contact and history information here, rather than Outlook. However, users don't have to choose, they can use both Outlook and Sage CRM SalesLogix and Advanced Outlook Integration will en-



Sage CRM SalesLogix Advanced Outlook Integration allows you to have the best of both worlds.

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# Advanced Outlook Integration CONTINUED

sure both databases are always in sync.

## How It Works

The Outlook email window has a new *Send SLX* button. After composing your email in Outlook, click the button to send the email and save it in the Sage CRM SalesLogix database. It's that simple. No extra steps involved, just a single click and that email is recorded in Sage CRM SalesLogix.

Your entire Sage CRM SalesLogix address book is available from within Outlook. Just click the *To* or *CC* button, then pick the Sage CRM SalesLogix address book from the drop-down list. Even easier—simply start typing names from your Sage CRM SalesLogix address book into an email and Outlook completes the name for you! Even if the Sage CRM SalesLogix application is closed, you'll still have access to these features.

When you want to send a file from the Sage CRM SalesLogix Library to a Contact or Lead, simply click *Sage CRM SalesLogix Library* from the Insert menu in Outlook. You can then select and insert the file into your email—simple and efficient.

When your Outlook Inbox gets cluttered with dozens or even hundreds of email messages, how do you quickly identify messages from your customers, so you can give them prompt attention? Advanced Outlook Integration compares senders' addresses and flags those that match contacts in your Sage CRM SalesLogix database.

## Calendar Integration

Your busy calendar involves meetings with both Sage CRM SalesLogix users and non-users. The Advanced Outlook Integration ensures your calendar is always accurate and up to date.

From within Sage CRM SalesLogix, you can use the Outlook *Attendee Availability* feature to help you schedule appointments by viewing any Outlook user's schedule. Schedule that meeting and an Outlook Meeting Request is sent to all attendees. Other Sage CRM SalesLogix users' calendars are automatically synchronized with Outlook. This means that whichever calendar tool your attendees rely on, they'll receive your invitation.

This integration also works the other way. Non-Sage CRM SalesLogix users can schedule a meeting request for you through Outlook and your Sage CRM SalesLogix calendar will know about it.

Some Sage CRM SalesLogix users may still prefer to use the Outlook calendar and Advanced Integration can accommodate. You can tell Sage CRM SalesLogix to open the Outlook calendar as your default calendar.

## Automatic Synchronization

You can move groups of Outlook contacts into Sage CRM SalesLogix or one at a time. Want to move data the other way? No problem. Move contacts from Sage CRM SalesLogix into Outlook with one click. It's easy to filter out your personal contacts in Outlook and keep them from being transferred to Sage CRM SalesLogix.

There's no need to wait for synchronization to occur, simply click *Add Contact to Outlook* and Sage CRM SalesLogix will use the relevant contact information and populate an Outlook Contact form with it.

Once your Sage CRM SalesLogix contacts are in Outlook, you can synchronize them, along with your calendar and tasks, with your handheld device, so your customer information is always with you and always current.

Synchronization setup is flexible and customizable. You choose the sections of Sage CRM SalesLogix you want to synchronize with Outlook. Once you decide how and when you want the data exchange between Sage CRM SalesLogix and Outlook to happen, you won't need to think about it again. The Advanced Outlook Integration performs its synchronization automatically, so your calendars and contacts will always be in sync. You also can sync on command using a simple menu selection.

## Learn More About It

Sage CRM SalesLogix Advanced Outlook Integration is powerful, flexible, and intuitive. You simply use the email, activity, and calendar tool of your choice, and be assured that both your CRM solution and Outlook will stay up-to-date. We'd be happy to help you learn more about this feature, call us with your questions.

## Advanced Outlook Integration Allows You To:

- ▶ Record Outlook emails into Sage CRM SalesLogix History
- ▶ Lookup Sage CRM SalesLogix contacts from within Outlook
- ▶ Add attachments to Outlook emails from the Sage CRM SalesLogix Library
- ▶ Open the Outlook calendar from inside Sage CRM SalesLogix
- ▶ Schedule meetings for non-Sage CRM SalesLogix users
- ▶ Add contacts to Outlook from Sage CRM SalesLogix with one click
- ▶ Synchronize data automatically
- ▶ Use Outlook or Sage CRM SalesLogix interchangeably. ★

## Headline News CONTINUED

### SalesLogix Mobile Supports BlackBerry

SalesLogix Mobile v4 adds support for BlackBerry handheld devices. SalesLogix Mobile delivers most of the functionality you're used to in the full application. You can easily



view or add accounts and contacts, schedule and complete activities, take notes, and track opportunities and review support tickets on a BlackBerry mobile device. For more information see our article on page 3. ★

# Sage CRM SalesLogix Mobile

## What's New In v4

In our last issue of *\*info* Newsletter for Sage CRM SalesLogix, we highlighted the features of the Sage CRM SalesLogix Pocket PC client. Recently, Sage Software has added a number of improvements to its mobile version, including a new name—**SalesLogix Mobile**. In this article, we'll provide an overview of SalesLogix Mobile in general, and also look at what's new and improved with SalesLogix Mobile v4.

### Overview Of SalesLogix Mobile

When you are on the road you can manage your activities as efficiently as when you're in the office.

#### Be Productive Anywhere

SalesLogix Mobile provides full activity management support for both Pocket PC and the BlackBerry handhelds, including the ability to schedule and complete meetings, phone calls, to-do items, and personal activities using an intuitive drag and drop calendar.

For Pocket PC users, handwriting recognition is supported for Activities or adding Notes and History records. On a BlackBerry handheld, SalesLogix Mobile allows you to easily view or add accounts and contacts, schedule and complete activities, take notes, and track opportunities with a familiar Sage CRM SalesLogix interface.

Both the Pocket PC and the BlackBerry clients provide access to virtually all of the information available in your Sage CRM SalesLogix database. A tabbed user interface makes it simple to navigate through the Main, Detail, and other Sage CRM SalesLogix views. Sort the data columns in ascending or descending order with a single tap of the stylus and even customize the forms to choose which columns to display. You'll be able to search, sort, and review Sage CRM SalesLogix Support Tickets. For Pocket PC users, you can fully edit tickets. Tickets are read-only with the BlackBerry client.

#### Synchronization Is A Snap

You can synchronize your handheld wirelessly via a dial-up line or by a cradle connection. It's a simple process that ensures you've always got the most current information with you.

#### An Edition To Suit Everyone

SalesLogix Mobile comes in three editions to suit every business need. The features and standard

user interfaces are identical for all editions.

The **Personal Edition** connects directly to the user's remote database via cradle sync. It will not synchronize to a Mobile Server or synchronize wirelessly. This is an inexpensive option to get Sage CRM SalesLogix on your company's mobile devices. The customization capabilities we mention in this article do not apply to the Personal Edition.

The **Standard Edition** synchronizes to a



Access your important Sage CRM SalesLogix data from your Pocket PC or BlackBerry.

Mobile Server either wirelessly by phone or by cradle to local desktop or laptop PC. The user can configure many aspects of the Standard Edition interface.

The **Enterprise Edition** synchronizes to a Mobile Server either wirelessly via phone or via cradle to local desktop or laptop PC. This version allows for full customization including addition of fields, screens, and top-level objects.

We're happy to provide pricing details and assistance in selecting the edition most appropriate to your needs.

#### Customizable

With SalesLogix Mobile, you're not stuck with an out-of-the-box application. Using the **Mobile Architect** design and development tool, available with the Enterprise Edition, you can create, deploy, and manage mobile applications that precisely suit your business and your users' needs.

#### BlackBerry Support

SalesLogix Mobile v4 adds support for the BlackBerry wireless handheld device. SalesLogix Mobile delivers most of the functionality you're used to in the full application. You can easily view or add accounts and contacts, schedule and complete activities, take notes, track opportunities, and review support tickets on a BlackBerry mobile device. Use your track wheel to navigate the application and uncover the data you need quickly and easily.

#### Mobile Architect

The Mobile Architect was enhanced in v4, giving you ultimate control in tailoring the application to meet the needs of your mobile force.

#### Compatibility Information

To take advantage of the new SalesLogix Mobile v4 with BlackBerry support, you must be running Sage CRM SalesLogix v6.x or v7. If you are running Sage CRM SalesLogix v5.2x, you can use SalesLogix for Pocket PC v3.31 or later.

SalesLogix Mobile supports Pocket PC 2002 devices and Windows Mobile 2003 devices. Windows Mobile 2003 devices are recommended for increased performance. Current BlackBerry wireless devices are supported (typically those under two years old).

Please call us for full details on version compatibility and system requirements.

#### Mobile CRM In Your Organization

Mobile technology provides value to both the individual and the company. Individual users can use the handheld device they're familiar with to improve their customer interactions. For the company, the high adoption rates, increased productivity, and better information on customers, prospects, and competitors are huge incentives.

SalesLogix Mobile is quick to install, centrally managed, customizable, and can utilize your existing mobile devices. If you'd like more information on Sage CRM SalesLogix Mobile Solutions, please give us a call. ★

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Info

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*"Simplesoft Solutions was instrumental in our successful installation of Sage CRM SalesLogix. They provided us with training regarding forms, tables, and data conversion. This enabled us to complete many system modifications ourselves".*

*Dave Homan, Marketing Director, McGohan Brabender*

## What's New:



[A cool deal for summer on Sage CRM SalesLogix user licenses from Simplesoft Solutions!](#) Now is the time to add those additional licenses you have been needing for Sage CRM SalesLogix users. Save 10% on the cost of each license through August 31, 2006. Mention special offer code ADDSS-SLX-06 when ordering from Simplesoft Solutions. This offer is for current customers and good on add-on orders of Sage CRM SalesLogix user licenses only from July 1, 2006–August 31, 2006.

[Updated website for Simplesoft Solutions: Simplesoft.net](#) has brand new look. Check it out today!

[New face at Simplesoft Solutions:](#) Arminta Ward comes to Simplesoft Solutions already a Sage Certified Developer for Sage CRM SalesLogix from her years at Morning Pride Manufacturing in Dayton, OH. Arminta has extensive experience in Crystal Report design and Sage CRM SalesLogix customizations. I'm sure many of you will be working with Arminta in the months to come.



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## Upcoming Events:



Sage CRM SalesLogix Basics for New Salespeople (v6.2)—Webinar for your new sales people, Tuesday, July 25 from 11:00 a.m.–12:30 p.m. EST or Thursday, July 27 from 3:00 p.m.–4:30 pm EST. Cost of the session is \$79 per sales rep. The session will cover the basics of adding new contacts and accounts, scheduling and completing activities & events, adding and updating opportunities, and some productivity features such as e-mailing notes from Sage CRM SalesLogix. Sign up today! [jross@simplesoft.net](mailto:jross@simplesoft.net)

Adequately plan for retirement of older version of Sage CRM SalesLogix using the following planned retirement dates:

Sage CRM SalesLogix v5.2—retires January 1, 2007

Sage CRM SalesLogix v6.1—retires March 1, 2007

## Customer Profile



Gem City Engineering, GCE, is the premier manufacturing solutions partner for the automotive, defense, microelectronics, disk drive, medical, and consumer goods industries worldwide. They design, build, integrate and service a wide range of systems and electrical/mechanical assemblies worldwide. Gem City Engineering is one of our newest customers and their selection of Sage CRM SalesLogix was made by Tim O'Meara, VP of Sales, because of the ability to automate a very defined sales process used at Gem City. The forecasting and reporting ability of Sage CRM SalesLogix will save Tim nearly 8 hours each month. The new dashboards will keep his salespeople focused on results daily and will also provide a management roll up for Tim's viewing.

## Meet Our Experts:



Jim Pemberton has been with Simplesoft Solutions for 2 years and has many years of experience with Sage CRM SalesLogix, dating back to version 3.0. He enjoys the development side of Sage CRM SalesLogix and the challenge of automating customer business processes. He does a great job of problem solving with customers, regardless of their technical skills level, because of his ability to explain things in layman's terms

Jim and his wife, Amy, have 3 children; 2 teenagers and 1 preteen. Between his 4-H activities with his 3 children and his passion for bowling, life stays very busy, and he wouldn't have it any other way.