

“SINCE YOU’RE IN SALES,
YOU HAVEN’T GOT ANYWHERE NEAR
ENOUGH TIME TO PLOW THROUGH
A 200 PAGE

USER’S GUIDE.

HEY, IF SITTING AROUND READING EVER
CLOSED A SALE,
WE’D ALL HAVE EYESTRAIN.
BUT BEFORE YOU TOSS THIS IN YOUR
BOTTOM DRAWER,
LOSE IT BEHIND THE CREDENZA,
OR DROP IT IN THE CIRCULAR FILE,
CHECK OUT PAGE 43.”



User's Guide

**SalesLogix® Sales Information System™
Version 2.0**



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Sales Information System™ (2.0)

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(multi-user version)

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SALESLOGIX USER'S GUIDE

Chapter 1



Getting Help

Finding information online

This book demonstrates how you can use the power of SalesLogix to convert leads into opportunities and then into sales. As you follow the scenarios, you'll learn how to accomplish many of the activities that will contribute to your sales success. But this represents a small sample of SalesLogix features. *You'll find comprehensive information about all SalesLogix features in the online Help.* It includes detailed explanations of SalesLogix concepts, step-by-step explanations of the tasks you'll want to accomplish, and descriptions of the items you'll see in the SalesLogix windows and dialogs. You'll rely on Help to quickly get answers to your questions about SalesLogix.

To open SalesLogix Help, choose Help Topics from the Help menu. You can browse through topics by category, look through a list of index entries, or search for words or phrases that may be included in a help topic. To get help about a specific SalesLogix window or dialog, press F1 with the window or dialog open; to get help for a specific object within a dialog, select the object and press SHIFT+F1.

Throughout this guide you'll see references to ***Related Help Topics***, as shown in the following table. These references point you to general information about the concepts and tasks discussed in that section. Double-click the listed book on the Help Contents tab to open it. Some books contain other books. Continue to open the books until you see the page related to the topic you're interested in. For example, to get general information about using online Help, open the Getting Started book and double-click the Using the Help System page. To find information about a specific topic, go to the Index tab and type the first few letters of the word you're looking for. The Help index works the same way as the index of a book.



<i>Related Help Topics</i>	
To learn:	Open these topics:
How to use the Help system	 Getting Started  <i>Using the Help System</i>

Contacting SalesLogix

If you are a corporate user, contact your administrator, designated support person, or SalesLogix certified Business Partner. Please provide the following information:

- ◆ Support account number
- ◆ Version number of your SalesLogix software
- ◆ Software features you were using when the problem occurred
- ◆ Text of the error message you received (if applicable)
- ◆ Operating system (Windows 95 or NT)
- ◆ SQL database name and version

You can also check the FAQs (frequently asked questions) on the SalesLogix web page at www.SalesLogix.com.

<i>Related Help Topics</i>	
To learn:	Open these topics:
How to contact SalesLogix	 Getting Started  <i>Contacting SalesLogix</i>

Chapter 2

Selling with SalesLogix


New tools...

SalesLogix is designed to be customized to meet your company's specific needs. If your SalesLogix windows, dialogs, menus, and/or toolbars were customized for your company, the illustrations you see in this guide may not match what you see on your computer screen.

It's your first day on the job. You've filled out the paperwork with HR to make sure you get paid, been through employee orientation and your first software training class, found the coffee and the restroom, and been left to your own devices until you meet with your manager. This is a good time to take a look at your new tools and see if you can remember what you learned in class. Maybe you can also find out when you are scheduled to meet with your boss.

Log onto SalesLogix


If SalesLogix is not already running, you'll need to log on to the system. Before you begin, find the UserId and password you were given during training. If you don't have a UserId or password, contact your system administrator.

1. Click  and point to Programs.
2. Point to SalesLogix and choose SalesLogix Client from the menu.
3. Enter your UserId and password and click OK.
4. Select the database you are going to use from the drop-down list. (Your company may have a single database or several. Generally, there will be one "real" database and others for testing or training.)

To change the start-up view, select Options from the Tools menu. On the General tab, select the view you want from the *Show On Startup* drop-down list.

SalesLogix displays one of its main windows. These windows are called *views* in SalesLogix. You change from one view to another by clicking the icons on the navigation bar at the left side of the view.


Check your calendar

1. Click  on the navigation bar.
2. When the calendar opens, if you are in the Day or Week view, check the timeline area to see when the meeting with your manager is scheduled. If you are in the Month or Year view, check the Activities area.

You find your meeting scheduled for a late lunch in 15 minutes. Your stomach confirms the appointment. But you still have a few minutes of free time. How about setting up your calendar to match the way you work?

Set your calendar preferences

Your calendar defines your work week by showing some areas in white and other areas in gray. Some people may work from 8 to 5 Monday through Friday, but those are certainly not your hours. You need a broader time range to accommodate clients in different time zones, and there will surely be some weekends that you'll need to schedule appointments. No problem—you can adjust your calendar display to match your schedule.

1. Click the Week tab in the Calendar view. (You can set preferences from anywhere in SalesLogix—this takes you directly to the Calendar options.)
2. Right click and choose Options from the shortcut menu.
3. On the Calendar tab of the Options dialog, define your work week by selecting the check boxes for the appropriate days in the Work Week area.
4. Define your workday by entering Day Start and Day End times in the Calendar Display area. Click  in each field and drag the slider bar to the starting and ending times you want. Click OK when the correct time is shown.
5. Click OK to close the Options dialog.

You can also open the Options dialog by choosing Options from the Tools menu in any SalesLogix view.



The time period you set for each selected day is displayed with a white background in your calendar; days and times outside your selection have a gray background. You can schedule activities in both the white and gray areas.

You probably noticed many other options on the Calendar tab. You use the items on each tab of the Options dialog to customize SalesLogix. For additional information, check the Related Help Topics at the end of this section.

Contacts and accounts

Your prospects and customers are called contacts and accounts. Accounts are companies that can contain one or many contacts. Potential sales to accounts and contacts are called opportunities. You can associate the key contacts involved in a potential sale with an opportunity.

SalesLogix tracks your daily interactions with contacts, such as phone calls, meetings, to-do's, correspondence, and more. You can view and report on these tasks from an account, contact, or opportunity perspective.

You can work with your contacts and accounts in a table format using the Contact List view and the Account List view, or see in-depth information about one contact or account at a time in the Contact Detail view and the Account Detail view.

Your access to accounts and account-related information depends upon the type of account and your access rights. For information about your access rights, check with your system administrator.

There are two types of accounts: public and personal.

Public accounts and their associated contacts are visible to all users with access rights to the account. These accounts can be owned by individual users, teams of users, or everyone.

Personal accounts and their associated contacts are owned by the user who enters the contact and can only be viewed by that user. When you enter a personal contact, an account is created using the contact name and your name displays in the owner field. Your ability to add personal contacts depends on your access rights.

If you are a remote user, you can choose the accounts you want to store on your local database using subscription. You automatically subscribe to accounts you own as an individual or as the primary team member.



View contact (or account or opportunity) information

As noted earlier, you can look at one line of information about many contacts or detailed information about a single contact. Take a minute to become familiar with the information displayed in each view.

The Contact List view displays a single line of information about each contact in the list. You can customize the information displayed in the Contact List view to fit your needs, including items such as contact name, account name, city, state, work phone, and so on. Click the tabs in the Contact List view to see a group of contacts.

The Contact Detail view contains in-depth information about one contact at a time. The Detail view has three sections:


- ◆ The top section shows detailed information about the selected account. To edit the data, click the box you want to change. Right click to see the shortcut menu.
- ◆ You can use the section in the middle to display the tab you use most often. Select a tab from the bottom of the view and drag it into the middle of the view.
- ◆ The Contact tabs are at the bottom of the view. Click a tab to see detailed information about the selected contact.

To switch between the Contact List and Detail views, click  or .

Add yourself as a contact

Be sure to enter contact and account information accurately. This information is used exactly as you type it when you send e-mail, letters, and faxes. It is also used when you search for contact and account characteristics.

Now that you're on board, make it official by adding yourself as a contact.

1. Choose Contact/Account from the Insert menu.
2. Click  in the Insert New Contact/Account dialog.
3. In the Insert New Contact dialog, fill in the information about yourself:
 - ◆ Press TAB to move from field to field.

- ◆ If the button appears when you go to a field, you can click it to select from a pick list, or you can type directly into the field.
 - ◆ Type your company's name in the Account field.
 - ◆ Click OK.
4. In the Edit Account Information dialog:
- ◆ Confirm that the information you entered is correct.
 - ◆ Select <None> as the account type.
 - ◆ Set yourself as the account owner.
 - ◆ Click OK.

The Contact Detail view appears showing the information you entered about yourself.



Check the information again to make sure it's accurate and add anything you've left out. It's better to have too much detail than not enough.

Who owns an account?


















Owning an account means you can use any account-, contact-, or opportunity-related feature; for example, scheduling activities, running reports, attaching processes, and so on. In SalesLogix, the user who adds an account does not necessarily own it. You can add an account and assign another user or team of users as the owner. For example, you might have an assistant that enters new accounts and assigns you as the owner, or a Telemarketing group that enters new accounts and assigns ownership to a sales team.

Sometimes it may be necessary to change the owner of an account. Your department might reorganize, some individuals may be replaced, or different people in your company might need ownership of an account at

different stages of the sales cycle. Once an owner is assigned, a set of rules governs who can change the owner.

Your access to data within an account, contact, or opportunity is controlled at the table or field level. You can have different data access rights as an individual owner of an account and as a member of the team who owns an account. For example, if you own an account as an individual, you might have full access rights to all tables and fields, but as a member of a team you have view-only rights.

The Account and Contact Detail views include an Owner field. You set ownership in the Account Detail view; the Owner field in the Contact Detail view is for display purposes only. In the Owner Assignment dialog you can assign an individual user, team of users, or everyone as the owner.



<i>Related Help Topics</i>	
To learn:	Open these topics:
About SalesLogix features	 <i>Introducing SalesLogix</i>
How to log onto SalesLogix	 Getting Started
	 <i>Logging onto SalesLogix</i>
About your SalesLogix workspace	 Getting Started
	 <i>Your Workspace</i>
How to customize SalesLogix	 Getting Started
	 <i>Setting Preferences</i>
How to use your calendar	 Managing Your Daily Tasks
	 Scheduling Activities and Events
	 <i>Using Your Calendar</i>
About accounts	 Accounts
	 <i>What Are Accounts?</i>
	 <i>Who Owns an Account?</i>
About contacts	 Contacts
	 <i>What Are Contacts?</i>
	 <i>Adding Contacts</i>
	 <i>Working with Contact Detail Information</i>

Getting organized...

Time to get to work. The boss filled you in on “corporate culture” at lunch, stressed that e-mail is the preferred method of communication to keep paper to a minimum, and handed you a folder full of notes and memos (seems old habits die hard). Better skim through the notes and check the mail.

You were wise to check the paper first...there’s an important note at the top of the pile. Back to your calendar to add to your schedule. But first you better check your mail to get the actual dates of the trade show and see what else you need to schedule.

Check your e-mail

SalesLogix provides a seamless connection to your company’s e-mail system. The icon in the bottom right corner of your SalesLogix screen tells you if you’re logged onto e-mail. If the icon looks like this, , you’re logged on; if it looks like this, , you’re not. To log on, right click the icon and select Logon to E-Mail from the shortcut menu.

If you get an error message when you log on, your e-mail options may not be set correctly. Contact your system administrator for help.

From the desk of:
Jean Wiff

*Chris,
Staff meeting every Monday,
8:30 sharp. Check to see if you
need to attend any other meetings.
Make sure you block out time for
the trade show next month.*

*Welcome aboard.
Jean*

Your e-mail software opens to the compose message screen. Using the functions of your e-mail system to read your messages, you find lots of welcomes from your co-workers and complete information about the trade show next month.

What are activities and events?

Activities include making phone calls, going to meetings, and completing to-do’s, such as sending correspondence or preparing a presentation. An activity is generally scheduled for a portion of the work day. In contrast, *events* usually span several days; for example, a trade show, business trip, or vacation. You can schedule activities during an event, such as appointments you make during a business trip. Scheduled activities appear on your calendar and on the Activities tab in the Activities view. Scheduled events appear on the Events tab in the Activities view and

above the timeline in your calendar.

In addition to business-related activities, you can also schedule personal activities, which are private obligations, such as a doctor appointment. Personal activities are not attached to an account, contact, or opportunity.

When you wrap up an activity, it is important that you mark it as complete so you have a record of it in the contact history. This is obvious when you finish a meeting or return from an appointment. However, you also probably complete activities that are not formally scheduled, such as returning a phone call or answering e-mail. You can record these *unscheduled activities* directly into a contact's history by entering it as a completed activity.

In some cases you might want to schedule an activity for a specific date, but not at a specific time. *Timeless activities* are scheduled to occur on a certain date, but at no particular time. Timeless activities display in the timeless section in the Day and Week Calendar views. In the Month and Year Calendar views, timeless activities display without a scheduled time.

If you have a staff meeting every Monday morning, you can schedule it as a *recurring activity*. Recurring activities take place at the same time each day, week, month, or year.




You can also schedule activities that include other SalesLogix users and reserve resources for an activity, such as a conference room or overhead projector. To make sure you are prepared for upcoming activities, you can set a pre-activity alarm.

You can configure the Activity Manager to alert you to activities that are overdue or waiting confirmation. If an activity is overdue, you can roll it over to the next day.



Schedule a recurring meeting

1. From any SalesLogix view, right click and select Schedule from the shortcut menu.
2. Select Meeting from the cascading menu.
3. In the Choose Activity Date dialog, click next Monday's date and click OK.

The appearance of the dialogs in steps 3, 4, and 5 depend upon how your scheduling options are set. If you do not see these dialogs, select Options from the Tools menu and set the *When Scheduling Prompt For* items on the Activities tab to On.

4. In the Meeting Regarding dialog, click , type Staff Meeting into the Item field in the Add List Item dialog, and click OK. This adds Staff Meeting to the pick list. Select Staff Meeting from the list and click OK.
5. Click  and in the Specify Time and Duration dialog, position your cursor at 8:30 and drag to 10:30. This should allow plenty of time for the meeting as well as following up on action items when it's over. Click OK.
6. In the Alarm area of the Schedule dialog, click the Set Alarm check box and set the alarm for 15 minutes lead time.
7. Click the Recurring tab in the Schedule dialog.
8. Click Weekly to select a frequency for the meeting.
9. Set the Weekly options. Your meeting is every week on Monday.
10. Click , select next Monday's date for the first occurrence of the meeting, and click OK to close the dialog.
11. To schedule the meeting for each Monday for a year, enter 52 in the *End after X occurrences* field.
12. Click OK to display all scheduled occurrences of the activity on your calendar.

Working with pick lists

A list of values you can select from when entering data in a field is called a *pick list*. Pick lists are useful because they encourage consistent data entry. You can open a pick list by pressing F2, clicking , or double-clicking in the field. If the pick list supports selecting multiple items, a  displays next to the items you select. Your ability to add, edit, or delete pick list items is determined by your access rights.




Schedule an event

Since the trade show spans the better part of a week, you schedule it as an event rather than an activity.

You can only delete an activity or event that you created.

1. From any SalesLogix view, right click and select Schedule from the shortcut menu.
2. Choose Event from the cascading menu.


Be sure to use a meaningful type of day, because this is how the event is identified in your calendar display. If the type of day you want to assign to the event is not on the list, you can type directly into the field.

3. In the Event Editor dialog, click  in the Start Date field, select the event starting date, and click OK.
4. Click  in the End Date field, select the event ending date, and click OK.
5. In the Day Type field, click  and select Trade Show from the list.
6. For your own information, type a description of the event and click OK.

Confirm meeting invitations

When you schedule a meeting or phone call in SalesLogix you can include other SalesLogix users in the activity using the Members tab in the Schedule dialog. Appointments you schedule this way appear on the Confirmations tab in the other users' Activities view. When your manager told you to check if there were other meetings you needed to attend, she was suggesting you check the Confirmations tab.














You can also schedule an activity on another user's calendar. For example, if you need a quote for a proposal, you might schedule it as a to-do for a co-worker. To do this, when you schedule the activity, select the other user's name in the User field on the General tab of the Schedule dialog.

1. Click  on the navigation bar.
2. Click the Confirmations tab in the Activities view.
You find the next two training sessions listed.
3. Select the first session on the Confirmations tab, right click, and select Confirm Activity from the shortcut menu.
4. In the Confirm/Decline Activity dialog, select Confirm or Decline from the drop-down list.
5. Enter a response in the Reply memo box.

6. Click OK.

The trainer who scheduled the activity is notified on her Confirmations tab. If you accept, the activity is scheduled on your calendar.

7. Repeat the process to confirm the other training session.

<i>Related Help Topics</i>	
To learn:	Open these topics:
How to use e-mail with SalesLogix	 Managing Your Daily Tasks
	 Communicating with Contacts
	 <i>Using E-mail</i>
About your e-mail and activity options	 Getting Started
	 <i>Setting Preferences</i>
About activities and events	 Managing Your Daily Tasks
	 Scheduling Activities and Events
	 <i>What Are Activities and Events?</i>
	 <i>Recurring Activities</i>
	 <i>Scheduling an Event</i>
	 <i>Activities with Multiple Users</i>
How to work with pick lists	 System Maintenance
	 <i>Pick Lists</i>


Getting personal...

That brings your business appointments up to date. You'll schedule your personal appointments, too, so you can have a complete picture of your calendar in a single place.

Enter a personal contact

In addition to business-related contacts, you can enter personal contacts into SalesLogix. For example, you can enter the name of your stockbroker to make it easy to communicate from work. When you enter a personal contact, a “dummy” account is created using the contact name (last name, first name) and your name is automatically inserted in the Owner field.

The contact's name is stored in the database in a way that allows SalesLogix to differentiate the title, first name, middle name, last name, and suffix. To ensure that the components of the name are stored correctly, double-click the Contact Name field and type the contact's name into the Enter Name dialog.

1. Select Contact/Account from the Insert menu.
2. Click  to add a new personal contact.
3. Enter the contact and account information in the appropriate dialogs. (For example, you can enter information about your stockbroker.)
4. Click OK to close the dialog.
5. Enter additional information in the Contact Detail view.

You can find your personal contact in both the Contact and Account List views.

Speaking of your stockbroker, you should send him a fax with your new work phone and fax numbers as well as your e-mail address. When you send faxes or letters to contacts in SalesLogix, you use templates.

What are templates?


Templates are predefined form letters (or memos, or proposals, or any other document) that consist of static text that does not change, and merge fields, which SalesLogix fills in using information related to the current contact. For example, a letter template you use for miscellaneous correspondence might contain merge fields for the date, contact name, account name, address, salutation, and your name and title. You would fill in the content of the letter on an individual basis. Or a template could be a multi-page proposal, containing the standard proposal text and

merge fields for relevant information about the contact, account, and opportunity.




SalesLogix includes basic templates for letters, memos, and fax cover sheets. You may also find templates customized for your specific needs. You can build new templates or edit existing templates.

Templates can be Public or Private. Public templates are distributed by the system administrator and stored in the Public Templates folder. Templates you create or edit are private and are automatically stored in your Private Templates folder.



Send a fax


If your contact list is very long, try this to speed up the search: Type the first letter of the contact's last name and click . The list now shows only contacts whose last name matches the letter you typed.

If you have trouble sending a fax or using the fax template, your fax options may be incorrect. Check with your system administrator.

1. Click  on the navigation bar.
2. In the Contact Detail or List view, click .
3. Type the first few letters of the contact's last name into the Find text box. The first matching item in the list is highlighted.
4. Continue to scroll through the list until the contact you are looking for is highlighted.
5. Double-click the contact to open the Detail view.
6. Check that there is a fax number for the contact in the Detail view.
7. Click  on the toolbar.


The default fax template appears in the word processor view with the merge fields filled in with information about the selected contact. If you want to use a different template, you must use Mail Merge. If you do not want to use the template, select New from the File menu to start with a blank page, or select Open from the File menu and choose another document. You can open any document saved as an .rtf file.

8. Type additional text into the fax cover page and make any necessary editing and formatting changes.
9. Click  on the toolbar to see how the document will look when printed. Click  to return to the document.


10. When you are satisfied with the fax, select Save from the File menu. Type a name for the fax. If you do not change the folder, the fax is saved in your Private Documents folder. Click Save.
11. Click  on the word processor toolbar to send the fax.
12. Click Yes if you want to record the fax as a completed activity in the contact's history. In the Complete FAX dialog, fill in the information about the fax you are sending and click OK.
13. Click Yes if you want to attach the fax to the contact. Select the directory where you want to save the document, enter a name (or use the name you assigned in step 10), and click Save. Documents you attach to a contact are listed on the Attachments tab in the Contact Detail view.
14. Select Exit from the File menu to close the word processor. When you exit the word processor, the fax is sent.











Schedule a personal activity

To make sure it doesn't slip through the cracks, you better add your dentist appointment to your calendar.

1. From any SalesLogix view, right click and select Schedule from the shortcut menu.
2. Choose Personal Activity from the cascading menu.
3. In the Select Activity Start Date dialog, click the day you want to schedule the appointment and click OK.
4. In the Personal Activity Regarding dialog, select Dentist appointment from the list and click OK.
5. Click  in the Activity Times area and set the duration of the appointment. (Remember to allow extra time, you *always* have to wait for the dentist.)
6. Set an alarm to make sure you leave on time.
7. Click OK to close the Schedule dialog.

The appearance of the dialogs in steps 3 and 4 depends upon how your scheduling options are set. If you do not see these dialogs, select Options from the Tools menu and set the *When Scheduling Prompt For* items on the Activities tab to On.

To see a list of all your personal activities, click  on the navigation bar and select the Personal tab.

<i>Related Help Topics</i>	
To learn:	Open these topics:
How to add or find a contact	 Contacts
	 Adding Contacts
	 Finding a Contact
Send form letters and faxes	 Managing Your Daily Tasks
	 Communicating with Contacts
	 Working with Templates
	 Sending Faxes
How to schedule a personal activity	 Managing Your Daily Tasks
	 Scheduling Activities and Events
	 Schedule an Activity

Uh oh, trade show...

Visions of a trade show...four days on your feet, saying the same thing over and over until your voice is gone. Your reward: a two-inch thick stack of “leads”(which look a lot like business cards that passers by dropped in the fish bowl at your booth hoping to win a free t-shirt).

You can erase that vision. This time it's different. That stack of cards was delivered to your company's Telemarketing department. They contacted each lead, and using a structured script to obtain information, classified them according to level of interest and the match between their requirements and your product. In other words, they qualified the leads. Since your sales team was among those that worked the trade show, you reap the rewards without wasting time trying to guess which of those business cards might lead to a sale.

How will you find those leads among the thousands of contacts in the database? No problem. Telemarketing searched the database for all leads generated at the trade show that are owned by your team and have a “hot” status. They saved the lookup as a contact group. All you have to do is find your leads in the group and get the sales process going.

What are groups?

Groups help you manage your workflow. You can use groups to work with a subset of your accounts, contacts, or opportunities, to select data to include in reports, and to send mailings, e-mail, and faxes using SalesLogix Mail Merge. You can create a group based on a specific set of conditions that you define, or choose individual accounts, contacts, or opportunities from your database. Any account, contact, or opportunity can be a member of more than one group.


For example, suppose you want to target specific accounts for a sales campaign featuring a specific product line. You could build a conditional statement to look for active accounts that purchased related products during the past year. Accounts that meet these conditions are placed in a group you name Promo '97. You could then use Mail Merge to send promotional material to the accounts in the group. Groups created based on a set of conditions are dynamic. Each time you open a group, your accounts, contacts, or opportunities are re-evaluated using the conditions you defined.

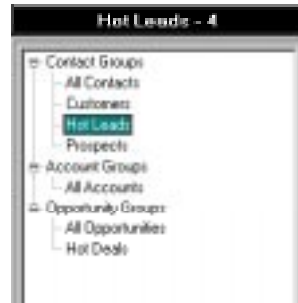
If you want to create a group whose members are selected based on your personal knowledge of the account, contact, or opportunity, or where

there is no clear set of conditions with which to select the correct accounts, contacts, or opportunities, you can create an Ad Hoc group. For example, suppose you have 20 tickets to the PGA and want to invite 19 of your contacts. It would be difficult to create a set of conditions that would select exactly 19 contacts. You can select these unrelated accounts, contacts, or opportunities from the List view and save the selected items as a group. Unlike groups based on a conditional statement, Ad Hoc groups are static; their content always remains as it was when the group was created.

To view a group, click the Group button in the Account, Contact, or Opportunity Detail or List views. While a group is active, only the accounts, contacts, or opportunities that are members of the group display.

Look up your leads

1. Open the Contact List or Detail view.
2. Click the Group button in the upper right corner of the view.
3. If necessary, click  to open the Contact Groups list.
4. Double-click the Hot Leads group.



The Group button changes to display Hot Leads and shows the number of leads in the group. To find your leads, you need to filter them out of the Hot Leads group. Your boss told you to look for leads that had “Prospect A” in the Type field.

5. With the Hot Leads group active, select Type from the Lookup menu.
6. Type Prospect A into the criteria field in the Lookup Contact dialog.



7. Check *Within Current Group/Lookup (Hot Leads)* at the bottom of the dialog. This limits the search to the current group.

8. Click OK to initiate the lookup.
9. Now the Group button reads Prospect A and shows the number of leads you need to pursue. You'll want to save this list as a group for future reference.
10. Select Save As Group from the Lookup menu.
11. Type a name and a description for the group and click OK.
12. Click the Group button to see that the new group is now on the list.

Using Lookup

You just used Lookup to do a very simple search. Before you received the Hot Leads group, Telemarketing used Lookup for a more complex search. They located all the leads generated at the trade show with a "hot" status that are owned by your team. As you can see, Lookup is a powerful tool.

There are four ways to set up a lookup, ranging from a simple keyword search to a complex lookup based on criteria you define.

The simplest and fastest way to look up accounts, contacts, or opportunities is to use the **predefined** lookups such as company, first name, last name, city, state, and so on, that are included on the Lookup menu. You can also do this kind of search by clicking a field name in the Detail view. This opens the Lookup dialog where you can further define the criteria for the search. Using the result of the first lookup you can continue to filter the list by doing additional lookups. For example, you could look up all the accounts that are not in the United States, and then filter that group according to sales rep.

Use the **Keyword Search** lookup to build a list of accounts, contacts, or opportunities by searching the database using a word you enter. You can specify the fields and tables SalesLogix searches. For example, you remember entering a note reminding you of a contact's vacation. You can't remember where you entered the note or the name of the contact, so you use the keyword lookup to search for the word "vacation."

To search several fields simultaneously, you can use a **query by example** lookup. In this type of lookup, you enter information into several fields of the Detail view. The lookup produces a list of accounts, contacts, or opportunities that contain matching information. For example, you could search for accounts in Ohio with a specific SIC code and credit rating.










The most complex type of lookup is based on a specific set of conditional

statements that you define in **Query Builder**. Using Query Builder you can simultaneously search multiple fields in the database using conditions such as AND and OR. For example, you could search for all active accounts with revenues over \$100,000 in the last six months that are owned by either the Gold or Silver sales teams.

Group building tips

When you build a group, follow these guidelines:

- ◆ If the group selection conditions are complex, you can use several consecutive lookups to identify the accounts, contacts, or opportunities for a group. Use the broadest conditions for the first lookup. In each successive lookup, add conditions to narrow the list of selected records. Once your list represents the correct records, select Save As Group from the View menu to save the group.
- ◆ If you are building an Ad Hoc group, use Lookup to narrow the list of prospective group members, then select specific records and save the group.
- ◆ If you use a lot of groups, be sure to enter meaningful group names and descriptions so you know why you formed the group.
- ◆ If many users need access to the same groups, create one group and use SalesLogix Architect to release the group to the appropriate users.




<i>Related Help Topics</i>	
To learn:	Open these topics:
How to create contact groups	 Contacts
	 <i>Grouping Contacts</i>
How to find a contact	 Contacts
	 <i>Finding a Contact</i>
How to use mail merge	 Managing Your Daily Tasks
	 Communicating with Contacts
	 <i>Corresponding with a Group of Contacts</i>
How to use lookup	 Contacts
	 <i>Finding a Contact</i>

First contact...

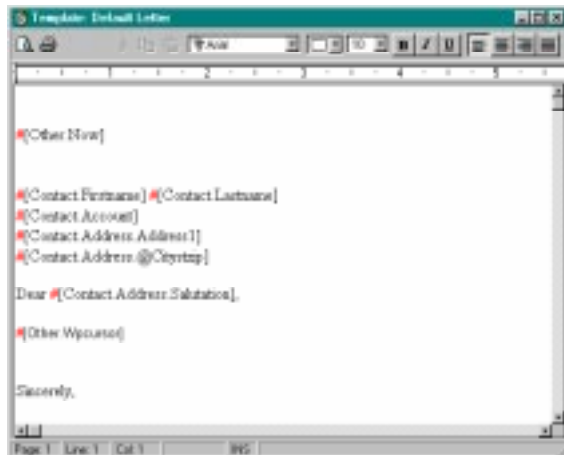
Now you have your very own group of hot leads to work with. You need to contact all the prospects quickly—before “hot” turns cold and you have to start from scratch. You can easily send an introductory letter with literature about your product to every prospect in the group. At the same time, you can schedule a follow up phone call.



Write a cover letter

In the “Getting personal...” section of this guide you learned how to use a template to send a fax. To create a cover letter for the literature you’re sending to the prospect group, you’ll create a new template by editing an existing template.

1. Select Templates from the Write menu.
2. If necessary, click  to open the Private Templates list. Click  again to open the Letter folder.
3. Select the letter you want to use as the base letter for the new template and click .




The template opens in the word processor window. As shown here, the template contains merge fields and static text.



4. Edit the template.
 - ◆ Check the merge fields to make sure they will contain the correct information. For example, you want to be sure the date is included, that the contact's first and last name will be in the correct order, and that all the elements of the address are included. When you select this template as the cover page for the literature pack, SalesLogix creates a letter for each member of the group and fills in the merge fields with information about the contact.
 - ◆ Add the text you want to include in the cover letter—introduce yourself, explain why you sent the letter, and draw attention to the literature it contains. Invite the prospect to call you or include the approximate time when you will be getting in touch. (You're sending exactly the same letter to every prospect, so you want to give yourself a span of time to make all the calls.)
 - ◆ If you want to change the appearance of the letter, use the items on the Format menu to define the page layout, paragraph spacing and indents, and text styles, fonts, and alignment.
5. To see how the page layout looks, click the  on the toolbar. Check the page layout, close the Print Preview window, and adjust the elements of the template as necessary.
6. When you are satisfied with the template, select Save As from the File menu and enter a new name for the edited template in the Properties dialog. Click OK.
7. Click  to close the word processor.

Send a literature pack

Your cover letter is complete, so you can schedule the literature request.

1. Select Literature Request from the Schedule menu.
2. Enter the reason for the request in the Description text box.
3. Enter the date you want to have the literature sent by. The default is five days from today, but since you want to make contact quickly, you change the date to three days from today (and hope the assistant who fills the requests can do it).
4. Click  and select a shipping method from the list. E-mail would be the fastest method, but since you're sending printed material, it's not appropriate. Click OK.
5. Click  in the Cover field and choose the template you just created from the list.
6. Select the Specific Group button, click , and select the prospect group you created from the list.
7. Specify the materials to be included in the package. Select a title from the list and click the up and down arrows to the right to set the quantity for each item. Continue to select items and set quantities. When the cover letter is printed, the items you select are included in a list of attachments.
8. Click OK. The literature request is recorded on the Literature and All Open tabs in the Activities view and on the Activities tab in the Contact Detail view.






If you have the appropriate access rights, you can add or delete materials from the literature list.

The assistant assigned to monitor Literature Requests will fulfill your request by the date you specified. If you want to check the status of your request, click the Activities tab in the Detail view for one of the contacts in the group. If the request has not been fulfilled, it is still listed. Once it has been fulfilled, it appears on the contact Notes/History tab.

Schedule a phone call to follow up the mailing

The last step is to schedule a follow up phone call for each contact in the group.

1. Click  on the navigation bar.
2. If you are in the Contact Detail view, switch to the List view by clicking  on the toolbar.
3. Make sure your prospect group is active. If not, click the Group button and choose the group from the list.
4. Select the first prospect name on the list, right click, select Schedule from the shortcut menu, and select Phone Call from the cascading menu.
5. In the Select Activity Start Date dialog, double-click the date when you want to schedule the phone call.
6. Double-click Confirm Literature Received in the Phone Call Regarding dialog.
By default, phone calls are scheduled as timeless activities—they are scheduled for a particular day, but at no particular time. Since you are going to call many prospects over a few days, you want to make sure you allocate a specific time to make the calls.
7. Click  in the Time field. Drag down the timeline to block out the time when you want to schedule the phone call. Click OK.
8. In the Schedule Phone Call dialog, click OK to schedule the phone call.
9. Move to each name on the contact list and schedule a phone call for each prospect in the group.

The appearance of the dialogs in steps 5 and 6 depend upon how your scheduling options are set. If you do not see these dialogs, select Options from the Tools menu and set the *When Scheduling Prompt For* items on the Activities tab to On.














Set a reminder

You know how easy it is for a phone call to “fall through a crack.” To make sure you don’t let these calls slide, you can set the Activity Manager to alert you to calls you didn’t complete.

While you are on the Activities tab, you can also change the *When Scheduling Prompt For* options and the Default Alarm Settings for each type of activity.

1. Select Options from the Tools menu.
2. Click the Activities tab.
3. Click the Phone Calls button.
4. In the General Settings area, make sure *Rollover on startup* is checked.
5. Click OK to close the Options dialog.

If you fail to complete a phone call on the day it is scheduled, the Activity Manager will remind you when you start SalesLogix the next day.

<i>Related Help Topics</i>	
To learn:	Open these topics:
How to create or edit a template	 Managing Your Daily Tasks
	 Communicating with Contacts
	 <i>Working with Templates</i>
How to send a literature pack	 Managing Your Daily Tasks
	 Communicating with Contacts
	 <i>Sending Literature to Contacts</i>
About adding literature to the list	 System Maintenance
	 <i>Literature</i>
How to schedule a phone call	 Managing Your Daily Tasks
	 Scheduling Activities and Events
	 <i>Scheduling an Activity</i>
How to set up the Activity Manager	 Getting Started
	 <i>Setting Preferences</i>

Getting info...

Your database is chock full of information about contacts and accounts and opportunities. Rather than running blind when you call the prospects, you decide to jump into the fray armed with as much information as possible by reviewing the contact notes and history and running some reports.

Working with notes and history

You can review all interactions with an account, contact, or opportunity by looking at the Notes/History tab in the Account, Contact, or Opportunity Detail view. This tab displays a list of notes and past interactions with the account, contact, or opportunity, including correspondence, completed activities, literature requests, and processes. The tab shows the type of activity, its date and time, the user who entered the item, a brief description of the item, and the result. Notes about the item are included as well as its category.

View details of an item on the Notes/History tab

To see a snapshot of the information recorded about an item, just pause the cursor over the item. A Tool Tip pops up with basic information about the activity or note. For a more detailed look at the item:

1. Select a contact, account, or opportunity.
2. In the Detail view, click the Notes/History tab.
3. Double-click an item in the grid.


If the item is a note, the View Note dialog opens. If the item is a completed activity, the View Completed Activity dialog opens.

4. Review the information and click .

You can only edit or delete notes and history items you created.

Add a note

If something catches your attention as you review the notes entered by Telemarketing during their initial qualification, you may want to add a note so you don't lose the thought.



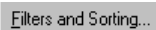
1. Select the contact you want to add the note to.
2. In the Contact Detail view, select  from the toolbar.
3. Fill in the fields in the Create Note dialog and click OK. The Note is recorded on the Notes/History tab.

Working with reports







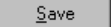

In addition to information directly related to the prospects, you can run reports to view and analyze data about your accounts, contacts, and opportunities. SalesLogix includes a variety of reports that range from basic address and activity listings to analysis of opportunities by probability of close or sales potential. You may find additional reports that have been customized for your company or department. When you run a report you can set filters to limit the dates covered by the report or the specific accounts included in the report. After you run a report, you can print, fax, e-mail, or save it.

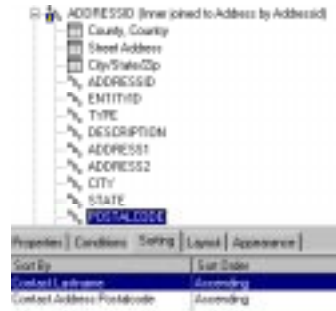
Run a report






When you start calling the prospects, your goal is to set up meetings as soon as possible. If you know which prospects are located close to each other, you can set up your schedule to minimize travel time. Running a report showing the prospects' locations sorted by zip code will help you do this.

1. Open the Reports view by clicking  on the navigation bar.
2. In the tree view, click  next to Contacts to expand the list of Contact reports.
3. Select the Contact Address Book - (Your Name) report.
4. In the Filter by Contact area, click the Specific Group button and select the Prospect A group from the drop-down list.
5. Click  to sort the addresses by zip code. Sorting changes you make are temporary; after you print, fax, e-mail, or

save the report to a file, the report reverts to the default filters and sorts.

6. In the Query Builder dialog, click the Sorting tab. Notice that the default for this report is to sort by the contact's last name.
7. Click  next to the ADDRESSID field at the top of the dialog to see the fields that make up the contact's address.
8. Drag the POSTALCODE field to the Sorting tab.
9. Click  to delete the Contact.Lastname sort and click OK.
10. Click  to see how the report will look.
11. In the Report Preview view, click  to make the report legible on your screen. Note that the contacts are sorted by zip code. Click  to close the preview.
12. Click  to save the report. In the Save Report to a File dialog, open the folder in which you want to save the report, name the report, and click .
13. Click  to print the report.



<i>Related Help Topics</i>	
To learn:	Open these topics:
How to work with notes and history	 Contacts
	 Notes and History
About reports	 Reporting
	 Working with Reports
	 Running Reports

First follow up...

It's the first day of the scheduled phone calls to the prospects. You have 10 calls scheduled and anticipate leaving five messages with assistants and five on voice mail. You have your message speech prepared. You dial the first prospect and hope for the best. It must be your lucky day—you get through to the first prospect on the very first try. (Maybe it really is a good idea to call before 9 a.m.) You're on a roll—the prospect was impressed with your letter and literature and is interested in hearing more. You schedule a meeting for next week and update your records.

Complete a phone call...

1. On your calendar, select the phone call you just completed.
2. Right click and select Complete Activity from the shortcut menu.
3. Fill in the Complete Phone Call dialog. The information in the dialog reflects what you entered when you scheduled the activity. You can change the information as necessary.

- ◆ Set the completed date and time. You completed the phone call right on schedule, so no change is required.
- ◆ You completed the phone call, so you don't need to change the Result field.
- ◆ Since you are going to follow up with a meeting, in the Schedule a Follow-Up area, select Meeting from the Type list. Check *Carry Over Notes* if you want the notes from your phone call copied to the meeting activity.




4. The information in the Regarding field is correct, so there's no need to change it.
5. Select a Category from the list. Leads might be the appropriate choice.

6. The Contact and Account are correct, so you do not need to change them. It's a little early to enter an opportunity for this contact, so you can leave that field blank.
7. Enter notes about the phone call that will be useful in your interactions with the prospect—specific items the prospect mentioned or the fact that you reached him directly at 8:15 in the morning.
8. Click OK.

...and schedule an appointment

Since you indicated a meeting would follow the phone call, when you click OK to complete the phone call, the Schedule dialog opens so you can schedule the meeting. In the same way you scheduled the phone calls:

1. Select the date you agreed on with the prospect.
2. Set the time by dragging on the timeline. Be sure to allow enough time to get to the prospect's office and return to your office (or to your next appointment).
3. Change the alarm settings if you want a reminder before the meeting.
4. Fill in the rest of the Schedule dialog, click OK, and get back to calling the rest of the prospects.

<i>Related Help Topics</i>	
To learn:	Open these topics:
How to complete an activity and schedule a follow-up activity	 Managing your Daily Tasks  Scheduling Activities and Events  <i>Complete a Scheduled Activity or Event</i>

Preparing for the appointment...

You need to get presentation materials together before your appointment. Fortunately, you don't have to build a presentation yourself. You find the perfect presentation in the Sales Library and customize it for the prospect.


What is the Sales Library?

The Sales Library is a central repository for company information. Files are organized into categories by creating folders and attaching files to the folders. Your company's library might include product information, presentations, policies and procedures, sales literature, spreadsheets, news bulletins, price sheets, annual reports, and manuals.

Only the administrator can add files to the Sales Library. If you are a workgroup user, you can access a file directly from the Sales Library without storing the file on your workstation. If you are a remote user, you can request files from the Sales Library.

Get a presentation from the Sales Library



1. Click  on the navigation bar.
2. Click the folder that contains the presentation you want to open.
3. Double-click the file icon to open the file.
4. Copy the presentation to your computer so you don't change the master version as you customize it. Make your changes and print your slides.

You're ready for the appointment.

Related Help Topics

To learn:

About the Sales Library and how to open files

Open these topics:



Sales Library



Working with the Sales Library






Opening or Ordering a File

Got a live one...

You meet with the prospect and his associates, demonstrate your product, dazzle them with your presentation, and collect their requirements. They tell you to submit a proposal ASAP. You commit to getting the proposal to them in three days and schedule a follow-up meeting for next week.

Complete the meeting activity and enter a follow-up appointment

You're back in the office. Before your glow of success fades, complete the meeting activity and schedule the follow-up appointment (just as you completed the phone call and scheduled the first meeting). Make sure you check *Carry Over Notes* so you can keep a running narrative of your activities with this prospect. Be sure to record "color commentary" along the way. Knowing if a contact plays golf or sails may come in handy down the road.

<i>Related Help Topics</i>	
To learn:	Open these topics:
How to complete a meeting activity and schedule a follow-up activity	 Managing your Daily Tasks  Scheduling Activities and Events  <i>Complete a Scheduled Activity or Event</i>

The opportunity...

You've got the prospect's requirements and a good idea of what this deal may reap if you can close it. There's a good opportunity for a sale here. You should enter the opportunity into SalesLogix so you can track its progress.

What are opportunities?

You use the SalesLogix Opportunity views to collect and analyze information relating to your potential sales to accounts and contacts. The Opportunity Detail view contains a variety of fields for you to record detailed information about each opportunity. It's not necessary to fill in all these items; when you add an opportunity, enter the information that is most important to your organization and add additional items later. To start, you might want to enter only the probability of closing the sale, the dollar amount, and the estimated close date. As the sale develops, you can track any combination of the following information:

- ◆ probability of close and potential revenue
- ◆ days in the pipeline
- ◆ estimated and actual close dates
- ◆ cycle and stage
- ◆ products involved in the sale
- ◆ competitors
- ◆ lead source
- ◆ related activities
- ◆ each key contact's involvement and influence over the opportunity





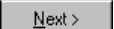

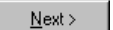

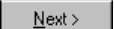
To follow the progress of a potential sale, analyze the effectiveness of your sales process, project revenues, and so on, you can generate a variety of forecasting and opportunity reports.

You can work with your opportunities in a table format in the Opportunity List view or see in-depth information about a single opportunity in the Opportunity Detail view. To manage your workflow, you can group opportunities using Lookup to search for opportunities that satisfy specific criteria.

Add an opportunity

The dialogs you see when you enter an opportunity may appear in a different order than the dialogs in these steps. To set the order in which the screens appear when you add opportunities, select Options from the Tools menu and click the System tab. Set your preferences in the Opportunity Wizard area.

If you have the appropriate access rights, you can edit the products and competitors lists. Select Manage from the Tools menu and then select Products or Competitors from the cascading menu.



1. Click  on the toolbar.
2. In the Insert New Opportunity dialog, type the name of the new opportunity.
3. Click  in the Account field to select the account associated with the opportunity.
4. Click  in the Lead Information area and select the lead source.
5. Select a status from the list. If the status you want to enter is not included on the list, you can type in the field.
6. Click OK.
7. In the Select Products dialog, click a product and then click  to fill in information about the price and quantity. SalesLogix computes the forecast based on the information you enter. Click OK. Select additional products if appropriate. Click  to move to the next dialog.
8. In the Select Competitors dialog, click a product and then click  to indicate if the competitor is the incumbent. Click OK. Select additional competitors if appropriate. Click  to move to the next dialog.
9. In the Select Contacts dialog, click a contact and then click  to specify the contact's influence on the opportunity. Enter any issues related to working with this contact. Click OK. Select additional competitors if appropriate. Click  to move to the next dialog and click OK.

All the information you entered appears in the Opportunity Detail view. You can edit the information or add details at any time.

The importance of lead sources




Whenever you add an opportunity or a contact, be sure to record the source of the initial lead; for example, a trade show, magazine ad, word of mouth, direct mail, and so on. If you keep careful track of your lead sources, you'll be able to calculate the cost of each lead, the percentage of leads from a particular source that develop into sales, and so on. For contacts, lead sources are listed on the Lead Sources tab in the Contact Detail view. Lead sources associated with opportunities are found on the Opportunity Detail view.

Associate a lead source with an opportunity

1. Click  on the navigation bar to open the Opportunity Detail view.
2. Select an opportunity.
3. Click  to the right of the Lead Source field.
4. Select a lead source from the list.
5. Click OK.

If you have the appropriate access rights, you can add, edit, and delete items from the list of available lead sources.

Related Help Topics

To learn:	Open these topics:
About opportunities and how to add them	 Opportunities  <i>What Are Opportunities?</i>  <i>Adding an Opportunity</i>

The proposal...


You committed to delivering the proposal within three days. Fortunately, you don't have to start from scratch. You can use a proposal you already prepared as the base and just customize the products and pricing for this prospect. You do need to get the pricing information from a co-worker, so you better get started. Unfortunately, you can't remember the name of the contact or account involved with the earlier proposal, but you do remember that you referenced it as "my first proposal" in the contact's notes.

Write a proposal

Since you know there is a reference to the "base" proposal in the contact's notes, you can use a Keyword Search lookup to find it.



1. Select Other from the Lookup menu and select Keyword Search from the cascading menu.
2. In the Keyword Search dialog, type "my first proposal" in the text field and check the Notes/History option (since that's where you entered the reference to the proposal). Click OK.

SalesLogix displays the relevant contact in the Contact List view.

3. Click  on the toolbar and click the Attachments tab.
4. Double-click the attached proposal to open it.
5. Edit the proposal in the word processor, changing the contact information and content as necessary. Leave the pricing information blank so the marketing manager can fill it in.
6. Select Save As from the File menu and save the revised proposal under a new name. Close the word processor.

If the Attachments tab is not visible, right click any tab and select Attachments from the shortcut menu. You can use this method to display or hide any tab in the Detail views.



Attach the proposal to the contact record

1. Open the prospect's Contact Detail view.
2. Select the Attachments tab, right click, and select Insert Attachment from the shortcut menu.
3. In the Add Attachment for dialog, click  and find the revised proposal file. Click .

4. Type a description of the file and click OK.

The proposal is now listed on the prospect's Attachments tab. Now all you need is the pricing information and the proposal is complete.


Send e-mail to a co-worker








1. If you are not logged onto e-mail, right click  and log on. If you are logged on, just click .
2. Compose mail to the marketing manager, giving an overview of what you need, when you need it, and referencing the contact name and proposal file.
3. Send the mail.

Since the marketing manager has access to your account information, she can find the contact, open the attachment, insert the correct pricing information, and re-save the file. There's no need to send the entire proposal. She'll send you a note letting you know it's done.

E-mail the proposal to the prospect

Since you're working in such a short timeframe, you'll e-mail the proposal to the prospect and follow up with a phone call.

1. Open the prospect's Contact Detail view and make sure an e-mail address is entered.
2. Click . Your compose e-mail window opens with the prospect's address already entered.
3. Type a cover note for the proposal.
4. Using the features of your e-mail system, attach the document and send the mail.
5. Schedule a follow-up phone call for tomorrow morning to confirm that the mail arrived.

<i>Related Help Topics</i>	
To learn:	Open these topics:
How to do a Keyword Search lookup	 Contacts
	 <i>Finding a Contact</i>
How to attach a document to a contact record	 Contacts
	 <i>Attaching Documents</i>
How to use e-mail	 Managing Your Daily Tasks
	 Communicating with Contacts
	 <i>Using E-mail</i>

Seal the deal...






Congratulations! Your proposal was accepted and the prospect placed an order. (Now your prospect is a customer!) Good for you. You hit that prospect at exactly the right time. If only it was always so easy...

Complete the phone call and schedule a follow up

1. Open the customer's Contact Detail view.
2. On the Activity tab, right click the phone call you just completed, and select Complete Activity from the shortcut menu.
3. Fill in the Complete Phone Call dialog the same way you did before. Be sure to schedule a follow-up phone call to check in with the customer shortly after the order is filled and to update your notes.
4. Click OK.

Close the opportunity

1. Open the customer's Contact Detail view.
2. On the Opportunities tab, double-click the opportunity detailing the sale you just closed.
3. In the Opportunity Detail view, click in the Status field and choose Closed - Won from the list. Click OK.
4. Update other opportunity information as necessary.

<i>Related Help Topics</i>	
To learn:	Open these topics:
How to complete a phone call	 Managing Your Daily Tasks
	 Scheduling Activities and Events
	 <i>Complete a Scheduled Activity or Event</i>
How to close an opportunity	 Opportunities
	 <i>Edit an Opportunity</i>



Pat Sullivan is president and CEO of SalesLogix Corp. Before launching SalesLogix, Pat was co-founder and CEO of Contact Software International, the original developer/marketer of ACT! and creator of the contact management category.

“This is page 43, the place where, if I don’t take too long doing it, I just might persuade you to give SalesLogix a shot.”

“Look, we both know that sales is about selling, not about mastering some fancy sales automation technology. But sales automation is happening everywhere and if it’s going to happen to you, wouldn’t it be nice if it happened with software that was designed with you in mind?”

“Yeah, I thought so. So here goes, quick and dirty, by the numbers.

(1) SalesLogix wasn’t designed by a bunch of technoid geeks who think sales are things that go with boats. It was designed **by** salespeople **for**

salespeople.


- (2) It’s as simple to use as a contact manager (I oughta know), yet it gives you plenty of sales-specific features to help you sell more (like the ability to track your deals through the pipeline).
- (3) It’s packed with time-saving shortcuts, like navigation buttons, pop-up lists, and customizable toolbars to help you do maximum work with minimum typing.
- (4) If you’re an ACT! user, you’re going to feel right at home, right off the bat, with menus and keystrokes that are conveniently compatible.
- (5) You can import data automatically—and not just from ACT! but from GoldMine™ and other products, too.
- (6) When you need information **RIGHT NOW**, pay a visit to the on-line Sales Library, a great place for price lists, product information and more.
- (7) No matter how many gazillion people or departments you’re dealing with at an account, you’ll always know where you stand, because SalesLogix gives you a company-wide view of your relationship.
- (8) If you aren’t on time and in touch, you’ll have only yourself to blame, because SalesLogix gives you all the tools you need, including a calendar, word processor, and links to your fax and e-mail programs.
- (9) What about those annoying forecast reports your boss is always asking for? No problem. SalesLogix can create and communicate them for you automatically.
- (10) SalesLogix even **does work for you!** Yup. You actually can automate those routine, monotonous tasks like literature fulfillment, correspondence generation, and e-mail and use SalesLogix to track the status of each routine, monotonous task.”

Pat

Take a deep breath...







You've been going at full speed since you started this job. Fortunately, you've been diligent about entering information into SalesLogix, so you should have an accurate picture of what you've done and what's coming up. This might be a good time to find out what's still on your plate. But you don't want to "page" through every day of your calendar....

Look at ALL your scheduled activities and events
















You can use the Activities view to manage all your scheduled activities and events. To open the Activities view, click the  on the navigation bar. The All Open tab shows a complete list of all your open activities. Each of the other tabs is devoted to a particular type of activity, event, or other SalesLogix feature. Double-click an activity to see details about it.

To make the list displayed on each tab manageable, you can select the timeframe for the displayed items. For example, if the timeframe is Next Month, only activities scheduled for next month are visible. To select a different timeframe, right click, select Time Frame from the shortcut menu, and choose an option. If you have a lot of recurring activities on your calendar, this feature is especially useful.

The first column in the grid on each tab may contain one of the following symbols. More than one symbol can apply to a single task. If more than one symbol is valid, the table indicates the display priority.

<i>Symbol</i>	<i>Purpose</i>	<i>Display Priority</i>
	Alarm is active for the activity	1
	Activity rollover option is active	2
	Recurring activity	3
	Task was initiated by a process	4
	Process task is complete	N/A
	Event	N/A

The second column in the grid indicates the type of task.

 Meeting	 Question
 Phone call	 Dialog
 To-Do	 ESP
 Note	 Data Base Change
 Page	 Report
 Document	 Sub-process
 E-mail	 Literature Request
 Fax	

Additional columns contain information relevant to the tab topic. You can customize the appearance of the tabs and the columns within the grids on the tab.

- ◆ The **All Open** tab displays ALL the activities you have scheduled within the chosen timeframe. Double-click an activity to view detailed information.
- ◆ The **Calls** tab lists phone calls scheduled within the chosen timeframe.
- ◆ The **Meetings** tab lists meetings scheduled within the chosen timeframe.
- ◆ The **To-Dos** tab lists to do items scheduled within the chosen timeframe.
- ◆ The **Personal** tab displays all the personal activities you have scheduled within the selected timeframe. For example, the dentist appointment you scheduled appears here.
- ◆ The **Alarms** tab lists activities that have a pre-activity alarm set. You can automatically set an alarm for any scheduled activity by setting selecting Options from the Tools menu, clicking the Activities tab, and setting the Alarm options.

- ◆ The **Events** tab lists events scheduled within the selected timeframe.
- ◆ The **Literature** tab lists literature requests you have scheduled. Literature includes catalogs, brochures, advertisements, and so on. If the first column on the tab displays a red box, it means the literature request has been fulfilled.
- ◆ The **Confirmations** tab appears only when another user schedules you to participate in a meeting or phone call. You can accept or decline activities listed on the Confirmations tab.

Now that you're settled in the new job—you're comfortable with the product, your team, your boss, and the basics of SalesLogix— it's time to streamline the process and wrestle the lead beast to the ground. Let's see what this system can do.

So many leads, too little time...

Suppose you were responsible for following up 50 qualified leads in your territory. How could you possibly handle that kind of volume, keep track of what you're doing, and service your existing customers at the same time? Don't worry, you can do it. SalesLogix processes keep you on track.

What is a process?

A process is a series of tasks that are executed in a specific sequence over a set time period. You attach processes to contacts (or a group of contacts). You can use processes to:

- ◆ *Perform repetitive tasks.* Remember earlier in this guide, when you spent a lot of time scheduling phone calls individually to pursue a whole bunch of leads? You did it the hard way. A process is the easy way. You could set up a process to schedule a phone call one week from the current date. Anytime you want to call a contact back in a week, you schedule this process to automatically place a phone call on your calendar. Scheduling the process is easier than scheduling the phone call.
- ◆ *Implement a sales process.* You could set up a process that guides you through qualifying a lead. When you receive a new lead you would schedule the process, which immediately sends a literature pack and schedules a follow up phone call in a week. (Sound familiar?) When you complete the phone call, the process prompts you to evaluate the prospect's interest level and decide whether to schedule another phone call, schedule a meeting, send a letter, or change the status of the lead.
- ◆ *Provide an automated way of following up with customers.* If you are focused on potential sales and don't have time to regularly call customers who purchased from you in the past, you can schedule a process that sends a letter every 30 days. Letters can urge the customers to keep you in mind when they make their next purchase or announce new products and upcoming sales. If you add an opportunity for the customer, the letter series stops.

When you use processes, you can:

- ◆ Schedule a process for yourself or another user.
- ◆ Attach a process to a single contact or a group of contacts.
- ◆ View any process attached to a contact to which you have access rights.
- ◆ Only scan processes that you attached to a contact.
- ◆ Only use processes that are released to you. Processes are released to users in SalesLogix Architect.

How a process works

You probably won't need to create processes; they will be supplied by your manager or the system administrator. But to use processes successfully, you should understand how they work. The following steps demonstrate how a lead qualification process might work.

1. You attach the Qualify Lead process to a group of target leads. Since you are sure you can convert some of these to viable prospects, you set up 5 groups to accommodate different Status classifications:

- ◆ Hot
- ◆ Could be hot
- ◆ Not so hot
- ◆ Warm
- ◆ Cold

Every new lead starts with a Status of (4) Warm.

2. To shake out "hot prospects," the process sends a letter inviting the contact to call you or return a card asking for more information.
 - ◆ If the contact calls, the current process terminates and a new process starts.
 - ◆ If the contact requests information, the process schedules a literature request. (*This is the branch that is followed here.*)
 - ◆ If there is no response in 20 days, the process sends a follow up letter.

3. The process schedules a literature request with a prepared cover letter. The letter thanks the contact for responding, asks her to review the enclosed literature, and commits you to calling in 7 to 10 days.

At the same time, the process schedules a phone call for you to follow up with the prospect in 7 days.

4. You make the phone call on schedule, determine the contact's interest level, and ask to schedule a meeting for further discussion.

While you are on the phone, the process opens a dialog asking if you want to schedule a meeting, schedule a phone call, send more information, or attach a sleep process.




- ◆ If the contact is amenable, you choose to schedule a meeting. The Schedule dialog opens so you can enter the details.
 - ◆ If the contact requests a call back, choose to schedule a phone call. The Schedule dialog opens so you can enter the details.
 - ◆ If the contact wants more information, select the third option. Another literature pack is sent with different material.
 - ◆ If the contact is definitely not interested, attach a sleep process. The sleep process wakes up in 30 days and sends the contact a letter.
5. If the option you select in step 4 causes a change in the contact's Status, the process makes the change. For example, if you select meeting, the Status changes to 2 (could be hot); if you select phone call, it changes to 3 (not so hot); if you send more information, it stays the same; and if you attach the sleep process, it changes to 5 (cold). When the sleep process sends the letter in 30 days, the Status will change back to 4.

Since you set up the groups based on Status, when the process updates the Status, the contacts are placed in the appropriate groups. This makes it easy for you to focus on the activities related to the groups with the most potential.

Attach a process to a group

1. Click  on the toolbar.

The Run Process tree view displays the contact processes to which you have access rights. Access to a process is controlled in SalesLogix Architect.


2. Select a process from the Run Process tree view. Click  if necessary to expand the list of processes. In this example, you would select the Qualify Lead process.
3. In the *Start this process on* area, click the Specific Group button and choose the Warm Leads group from the list.
4. Make sure your name appears in the Schedule for field.
5. To limit the tasks scheduled for a single day, click the *Only schedule XX processes per day* check box and type 8 into the text box. When the process exceeds this limit, remaining tasks are scheduled the next day and so on.
6. Click  to see a graphic display of the selected process. This will help you understand the tasks the process will execute and where you will need to make a decision about the next step.
7. Click  to attach the process.

You can view processes attached to a contact in the Processes tab or the Process Manager.

Keep your processes running


To keep track of processes you attach to contacts, you use the Scan options. Selecting a Scan option starts the process engine, which scans a process to determine if the next task in the process path is ready for execution. If the task is ready for execution, the process engine executes it. When the process engine encounters a task that is not ready for execution, it stops. It's a good idea to scan your processes after you attach a new process to make sure it is running. Within a short time you'll probably have many different processes attached to your contacts. Scan your processes at least once a day to make sure they are not stalled.

You can set options to run the Process Manager automatically. Select Options from the Tools menu and click the System tab. Click the *Run Process Manager on Startup* check box to scan your processes when you start SalesLogix. To scan more frequently, click the *Scan processes every XX minutes* check box, and type an interval in the text box.

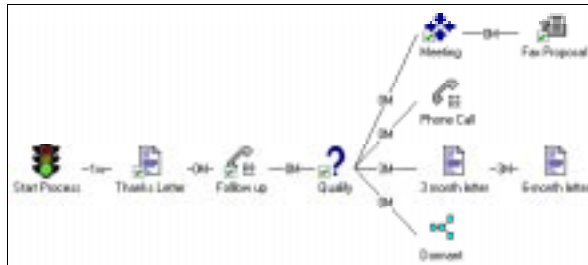
1. With the Contact Detail view open, click the Processes tab.
2. Click  to expand the list of processes in each category.
3. Select a process from either the tree view or the grid.
4. Right click and select Scan All Processes from the shortcut menu.

Display the graphical or detail view of a process

When you run a process, you'll want to know what to expect as each task executes. You can look at a graphical map of all the tasks in a process or see a list of information about when each task is scheduled and completed.


1. Click the Processes tab in the Contact Detail view.
2. Click  to expand the list of processes in each category until you find the one you want to view, or click a process in the grid.
3. Right click and select Show Graphical View or Show Detail View from the shortcut menu. The grid on the tab is replaced by the view you selected.

The graphical view of a process is shown below.









Change the status of a process

Sometimes, while a process is running, you may want to stop it or cancel it. Once you abort a process you cannot restart it, so be cautious when you change status.

1. Click the Processes tab in the Contact Detail view.
2. Click  to expand the list of processes in each category until you find the one you want to change, or click a process in the grid.
3. Right click and select Change Status from the shortcut menu.
4. Select Suspend or Abort.

Use Purge Processes to delete processes you no longer need.

<i>Related Help Topics</i>	
To learn:	Open these topics:
About processes	 Managing Your Daily Tasks  Automating Your Tasks  Processes  <i>What Is a Process?</i>  <i>Scheduling a Process</i>  <i>Scanning a Process</i>

Reach out and touch some everyone...

Slow down for a minute. You're spending all your time working these new leads. Who's keeping your current customers happy? Just as you appreciate it when a waiter delivers your meal and then checks back to make sure everything's okay, your customers will appreciate it if you don't abandon them after you close a sale. And they just might show their appreciation by investing in more of your product or service. The message here—stay in touch!

You've seen how SalesLogix processes facilitate lead qualification. You can also use processes to "touch" your customers often. Processes can send letters, e-mail, literature, and faxes, and schedule phone calls, meetings, and to-do's.

Before you can attach a "Touch the Customer" process, you need to get your customers together in a group. To do this, you'll need to find your active contacts who have made a purchase this year.

Use Query Builder to create a group

You create this group in two steps: first, you lookup all your contacts, and then you weed out the active customers who have purchased this year. Since the second lookup has several "nonstandard" criteria (nonstandard meaning they don't appear on the Lookup menu), you'll need to use Query Builder to define the lookup. Just follow along and you'll get the hang of it.

1. Select Owner from the Lookup menu. In the Lookup Contacts - Owner dialog, your name should be highlighted in the names list. Click OK.
2. To save the group that resulted from the lookup, select Save As Group from the Lookup menu. The Query Builder dialog opens, showing database tables and the fields they contain at the top and a series of tabs at the bottom.

The first step is to name and describe the group.

3. On the Properties tab:


- ◆ The name of the group reflects the name of the Owner lookup. Type a new name that indicates the ultimate goal of the lookup—perhaps “Stay in Touch.” The name you enter here is displayed on the Group button, in the List view group list, and in the Group Manager tree view.
- ◆ Enter a description of the group; for example, “active customers who purchased since January 1.”

The next step is to build the conditional statements by dragging database fields onto the Conditions tab. Each field begins a conditional statement. In the Assign Condition dialog, you select a condition and enter a value for each field. You use the And/Or connector to combine several statements in a query. Query Builder uses the condition and the connector in each statement to determine how to apply the query.


4. Click the Conditions tab. Since you created a group using Lookup, the query used for the lookup is already inserted in the Conditions tab.
5. The first conditional statement will determine if the contact’s status is active.

- ◆ Scroll through the tree view until you see the STATUS field and double-click it.
- ◆ In the Assign Condition dialog, select (=) *equal to* from the drop-down list as the Condition. Type “Active” as the Value and click OK.

6. The next two conditional statements are based on information in the OPPORTUNITY table. To have access to the fields in the OPPORTUNITY table, you need to join it to the CONTACT table.

- ◆ Scroll back to the top of the tree view, right click CONTACTID, and select Create Local Join from the shortcut menu.
- ◆ Click  in the Selected Table field and select OPPORTUNITY. You don’t need to change the Selected Field. Click OK to join the tables.



The Assign Condition dialog opens automatically when you drop a field onto the grid. To change a condition or value, open this dialog by double-clicking the statement you want to edit.

7. Now that the tables are joined, you can build the next two conditional statements to find opportunities that you won since January 1.
 - ◆ Click  to open the CONTACTID/OPPORTUNITYID join.
 - ◆ Double-click ACTUAL CLOSE. Select (\geq) *greater than or equal to* as the Condition and 1/1/97 as the Value. Click OK.
 - ◆ In the tree view, scroll down to STATUS and double-click. Select *contains* as the Condition and type Won as the Value. Click OK.
8. That's the last conditional statement. When you click OK, Query Builder applies each statement against the database. The result is your Stay in Touch group.
9. You can explore many other options when you use Query Builder:
 - ◆ In addition to building a query that selects the appropriate records, you can use the Defaults tab to set options to filter the group based on account ownership and to select only distinct records.
 - ◆ The fields inserted in the Sorting Tab grid are based on the type of Group you create (contact, account, or opportunity). You can remove these fields or add new fields. The fields on this tab determine the order in which the group is displayed in the Contact List view.
 - ◆ The Layout tab shows which fields are displayed in the Contact List view. Several fields are automatically included in the layout depending on the type of group (account, contact, or opportunity). Select fields to help you verify that the correct records were selected.
 - ◆ On the Appearance tab, you can set the font of the group title, the font and color of the fields displayed in the list, and the highlight color and font of the selected list item.

Notice that each statement has an entry in the And/Or column. Query Builder automatically inserts END for the last statement and AND for each of the other statements. The AND means don't select the record unless each of these statements is true. If you want to select the record if any of the statements are true, you can change the AND connector to OR by right clicking and selecting OR from the shortcut menu. You can use any combination of AND and OR to build a query.

Attach a process

To make sure you really do stay in touch with the group, attach a process that generates a variety of letters, faxes, or e-mail over the next six months, then schedule a phone call. Make sure the process includes a task that tests the customer's status before it sends correspondence. That way you won't look silly by sending a letter about purchasing when you might be working on an opportunity with them or they don't want to do business with you anymore (perish the thought).

<i>Related Help Topics</i>	
To learn:	Open these topics:
About Query Builder	 Contacts  <i>Find a Contact</i>

Why cook when you can order takeout....

At Monday's staff meetings, your manager always provides a composite report for your sales team. You would like to have sales reports for only your accounts, but you don't want to tie up your system running the reports. Order an agent to help you. You can ask your system administrator to schedule an agent and deliver the reports to you.

Ask the administrator to schedule an agent

When you ask your system administrator to schedule an agent and run reports for you, be sure you provide the following information:


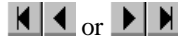




Your administrator may have created a form that you can use to request scheduling of a report agent. Check the Sales Library to see if such a form exists.

- ◆ Name of the report(s)
- ◆ Name(s) of the group(s) you want to run the report on
- ◆ Date you want the report run
- ◆ If it's a recurring report, the date you want the report to start, the frequency you want it run, and the date you want it to stop

View a delivered report

When the administrator schedules an agent to run reports for you, the reports are delivered via e-mail. Other users may also use e-mail to send you reports. You use the Report Viewer to view and print reports from e-mail.

1. Log onto your e-mail system and open the message that contains the report.
2. Double-click the report icon.
3. In the Report Preview view:


<i>Click:</i>	<i>To:</i>
	Adjust the on-screen view of the report
	See previous or next pages of the report
	Print the report
	Save the report in a file
	Open a previously saved report
	Close the viewer

Find out What's New






If you are a remote user, you can find additional information about What's New in Chapter 3, "If You Work (Totally) Offsite."

When you order reports, they are delivered via e-mail. Changes to accounts and contacts and other documents and files are delivered to you via What's New.



What's New information is organized on tabs. Some tabs apply to all users, some apply only to remote users. For workgroup users, the New, Updated, Deleted, and Conflict tabs display accounts and contacts you can access. For remote users, the tabs display the accounts you subscribe to. Double-click a record on a tab to see additional information.

To open What's New, click  on the toolbar or select What's New from the View menu.





Tabs that apply to all users

	New Accounts tab	Lists new accounts. If you are a workgroup user, you see accounts to which you have access rights. You can immediately work with any account in the list. If you are a remote user, you must subscribe to a record before you can work with it.
	New Records tab	Lists new non-account or contact information including opportunities, activities, and notes.
	Updated Records tab	Lists accounts and contacts that were changed by other users.
	Deleted Records tab	Lists accounts, contacts, and other related records deleted by other users.
	Conflicts tab	Lists accounts and contacts in which there was a conflict.

Tabs that apply to remote users only

	Delivered Documents tab	Lists Sales Library documents and document attachments. Use the Sales Library to view the library documents.
	Other Events tab	Lists other delivered files such as new software, database, maintenance, and so on.

Related Help Topics

To learn:	Open these topics:
How to view a delivered report	 Reporting
	 <i>View or Print a Delivered Report</i>
About What's New	 Managing Your Daily Tasks
	 <i>What's New</i>

Make the connection...





You're reviewing the reports from Monday's staff meeting and you notice that another salesperson is working on a deal with another division of the same company you have in the pipeline. When you pointed it out, the boss asked you to associate the accounts so you could run a single report on the whole company instead of separate reports for each division.

Create an account association

1. Open the Account Detail view for the account you want to create an association for.
2. Click the Associations tab in the Account Detail view.
3. With the cursor positioned in the Associations tab area, right click and select Associate an Account from the shortcut menu.
4. In the Lookup dialog, double-click the account you want to associate to the selected account.
5. Select the type of association from the drop-down list for each account. To add a new type, click Add and enter a name in the Add List Item dialog.
6. Enter a description for each account.
7. Click OK.

About contact associations

You can also use associations to create a relationship between contacts within the same account or across different accounts. For example, if Bill Hickman works for ABC Inc., and sells products to Wayne Clark, who works for XYZ Ltd., a buyer/seller association exists between them. If Sally Smith works for Jean Hickman, an employee/employer relationship exists between them. (Bill Hickman and Jean Hickman may be related, but that's not the kind of association we're talking about.) Associations are listed on the Associations tab in the Contact Detail view.

<i>Related Help Topics</i>	
To learn:	Open these topics:
How to associate accounts	 Accounts
	 <i>Associating Accounts</i>
How to associate contacts	 Contacts
	 <i>Associating Contacts</i>

SALESLOGIX USER'S GUIDE

Chapter 3

If You Work (Totally) Offsite

Note: SalesLogix supports both workgroup users and remote users. If you are a workgroup user, you have a direct connection to the workgroup database. You do not store a database locally on your computer. *You do not need to review this section of the user's guide.*

When you are added to the system, the system administrator determines if you are a workgroup user or remote user.

If you are a remote user, you will want to store a subset of the data in the workgroup database on your computer so it is readily available. SalesLogix provides two primary tools to ensure you get the information you need. To update the changes you make locally and to receive changes made to the workgroup database, you use synchronization. To identify the information you want to receive, you use subscription.

Leaving town...



Your company is expanding its sales force to the west coast and you've been asked to relocate. The incentive? Aside from great weather, once the office is fully functional, there's a good chance you'll be promoted to regional manager. You're nervous about being so far from headquarters and depending on your notebook computer to keep you in touch. You've had only two days of training...but there's no need to worry. SalesLogix has the tools to keep you in synch with what's happening at the home office.

What is synchronization?



Basically, synchronization links remote users to the workgroup database. As a remote user, you have a subset of the workgroup database stored locally on your computer. When you make changes to your local database, the changes are recorded in a transaction exchange file. When you synchronize with the workgroup database:

- ◆ Your computer connects to the Workgroup Server using Dial-up Networking, a network connection, or e-mail.
- ◆ Your transaction exchange files are sent to the Workgroup Server and archived.
- ◆ The Workgroup Server transaction exchange files are sent to you. These files contain changes made to the network database by other remote and workgroup users, sales library requests, reports, software updates, and so on. You only receive changes to accounts to which you subscribe.
- ◆ Your computer disconnects from the Workgroup Server.
- ◆ The Workgroup Server transaction exchange files are applied to your database and archived.
- ◆ Your changes are applied to the network database. As the files are applied, they are checked for conflicts. Conflicts are resolved based on conflict resolution rules. After the files are applied, they are archived.

Synchronize with the workgroup database

1. Select Synchronize from the File menu or click  on the toolbar.
2. In the Synchronization dialog, check *Disconnect When Done* if you want synchronization to terminate your connection after it sends and receives files, but before it applies received files. Select this option to minimize the connection time.
3. Set the synchronization options.
 - ◆ Contact your system administrator to find out which connection method you should select.
 - ◆ Check all the other options unless you are instructed otherwise.
4. Click  to close the options section.
5. Specify when you want to synchronize.



To synchronize now:



- ◆ Click . Each step of the synchronization process is shown in the Synchronization Status box.
- ◆ Click  to start applying transaction exchange files to your database. If you checked the *Apply changes after transfer* option, this is automatic.

As transactions are applied to your database, the Apply Changes to Local Database dialog counts the number of transactions already processed, the total number of transactions to process, the elapsed time, and the time required to apply the remaining transactions.

- ◆ Click OK to confirm apply.

To synchronize later:

- ◆ Click .
- ◆ Click . The color of the digital display changes from green to gold.

- ◆ Set the digital display to the time when you want to initiate Synchronization. Use  to adjust the time (in the 24-hour clock, 22:30 represents 10:30 PM) in the digital display.
 - ◆ **Do not close the Synchronize dialog. Make sure you are connected to a phone line or have an active network connection.**
- 6.** Resolve errors and review What's New.
- ◆ If you see the Synchronization Error dialog, contact your system administrator for information about resolving the error.
 - ◆ Review What's New to see if you received any of the following items. To open What's New, click  on the toolbar or select What's New from the View menu.

<i>To check for:</i>	<i>Click this tab:</i>
New accounts you can subscribe to	New Accounts
Other new items such as notes, opportunities, activities, and so on	New Records
Accounts and contacts you subscribe to that were changed by other users	Updated Records
Accounts, contacts, and other related records deleted by other users	Deleted Records
Conflicts for accounts and contacts you subscribe to	Conflicts
Sales Library requests and attached documents	Delivered Documents
Other files	Other Events

A note about conflict resolution

After you synchronize and disconnect from the Workgroup Server, you can edit records that also exist in the network server database. Because records that reside on both the network server database and remote databases can be changed independently, a mechanism is needed to decide which changes are valid. The Conflict Resolution component of synchronization decides which change wins. The administrator can identify up to three criteria to determine which user wins when a conflict occurs. After analyzing the two conflicting transactions a win, loss, or tie occurs. In the event of a tie, the next criteria is used to attempt to settle the tie and so forth. Generally, if all other options are exhausted and the transactions are still in conflict, the system allows the most recent alteration to prevail. Conflict are resolved when changes are applied to the network database, not the remote database.

If your change is in conflict, you receive notification of the outcome on the Conflicts tab in What's New. Ask your administrator for information about your rules.

What is subscription?

Typically, you have access to a subset of all the information in the company database. However, you will not need much of the data that you have access to on a regular basis. You can use subscription to select, or subscribe to, the accounts you use on a regular basis and want to store on your local database. Using subscription minimizes the database size on your computer and the time required to transmit synchronized data.

If you need a report that includes data which is not stored on your local database, you can ask the administrator to schedule a Report Agent. The Agent Scheduler can generate and deliver a report that includes all the data stored on the network database to which you have access rights.


Both you and the administrator can specify the accounts you subscribe to, as well as establish your subscription rules. When you or the administrator indicate you want to subscribe to an account, the request is transmitted the next time you synchronize. Use the Subscription Manager or What's New to subscribe to accounts and to set subscription rules. There are three general rules that govern subscription:


- ◆ You automatically subscribe to the accounts you own as an individual.
- ◆ You automatically subscribe to accounts you own as the primary member of a team.
- ◆ Users defined in your default security profile can subscribe to the accounts you own as an individual or as a member of a team. Your default security profile defines your ability to access information related to an account, other users who share access to your accounts, and your ability to create and maintain teams.

Subscribe to an account







From the What's New window:

You can also subscribe to accounts and unsubscribe using the Subscription Manager.

1. Select What's New from the View menu.
2. Click the New Records tab or the Updated Records tab.
3. Select a record and click  **Subscribe!**

You cannot subscribe to accounts preceded by .

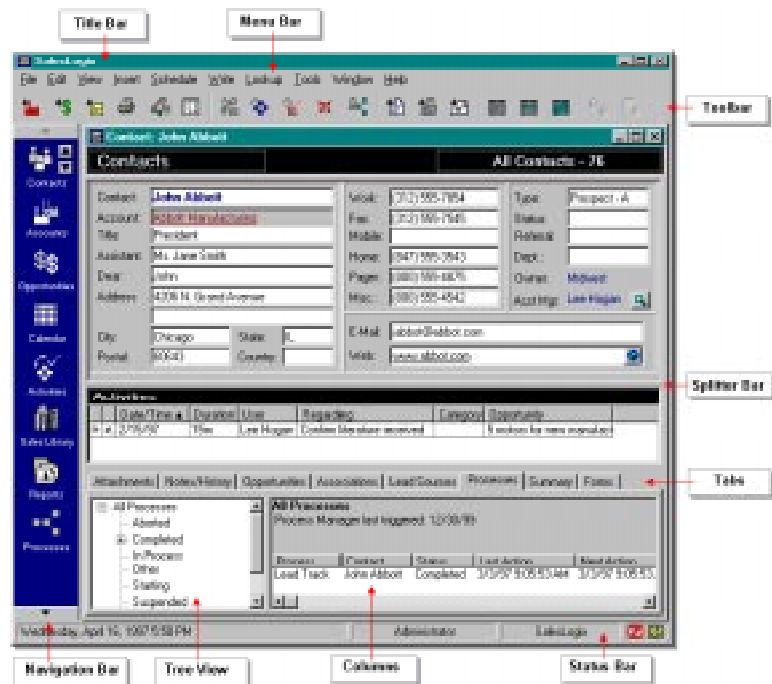
4. Click Yes to confirm subscription.

<i>Related Help Topics</i>	
To learn:	Open these topics:
About synchronization	 Remote User Features  <i>What Is Synchronization?</i>
About conflict resolution	 Remote User Features  <i>What Is Conflict Resolution?</i>
About subscription	 Remote User Features  <i>What Is Subscription?</i>

Appendix A

Your SalesLogix Workspace

Each view in your SalesLogix workspace contains many of the same elements.





- ◆ **Title Bar:** Identifies the active SalesLogix feature. When you are in the Account, Contact, or Opportunity views, it also displays the name of the current account, contact, or opportunity.



The menu items available to you are based on your access rights.



- ◆ **Menu Bar:** Contains the SalesLogix menus. You use the items on each menu to access SalesLogix features. Each menu item has a speed key, which is the underlined letter in the item name. For example, to print a report you can open the File menu and then press R. Shortcut keys appear to the right of some menu items; you can press these keys to activate the feature. For example, to open e-mail, press CTRL+F7. Use the Customize item on the Tools menu to add or remove menu items.
- ◆ **Toolbar:** Contains buttons that you click to open the most frequently used SalesLogix features. You can use the Customize item on the Tools menu to add buttons, create new toolbars, and hide toolbars.
- ◆ **Splitter Bars:** Used to change the size of a column or a section of a view. Move the mouse pointer to the border of a view section or column. When the double-arrow cursor appears, drag the line to the desired position. To restore the splitter bars to the previous position, select Restore Splitters from the Window menu.
- ◆ **Tabs:** You can customize the tabs in many SalesLogix views and dialogs. .

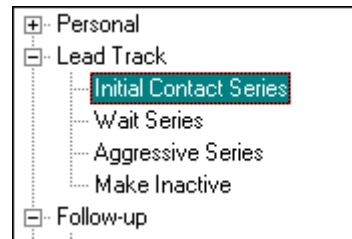
The toolbar buttons available to you are based on your access rights.



<i>To:</i>	<i>Do this:</i>
Rearrange the order of tabs	Drag a tab. When the cursor changes to  , drop the tab in a new position.
Hide a tab	Select a tab. Right click and select a tab from the shortcut menu. Tab names that are checked are visible.
Move a tab to the middle of the Detail view	In the Account, Contact, or Opportunity Detail view, select a tab and drag it to the middle of the view. When the cursor changes to  , drop the tab in its new position.

The navigation bar buttons available to you are based on your access rights.

- ◆ **Navigation Bar:** Located on the left side of the SalesLogix screen. It contains a series of buttons that open the major SalesLogix views: Contacts, Accounts, Opportunities, Calendar, Activities, Sales Library, Reports, and Processes. Click  or  at the top and bottom of the navigation bar to move the bar up or down. Click the arrows to the right of a selected icon to move to the next or previous account, contact, or opportunity.

- ◆ **Tree Views:** Lists of items organized into categories. Click  or  to expand or collapse the tree view. Use the scroll bar to scroll through the expanded list.



- ◆ **Status Bar:** Displays the current date, user, and application. Status Bar icons indicate if you are logged onto e-mail  or not . Right click an icon to open a shortcut menu. You can hide or show the Status Bar by selecting Status Bar from the View menu.

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Appendix B

Setting Preferences

You can control a variety of SalesLogix features by setting options that reflect the way you work. You can personalize your workspace by choosing colors and fonts and setting up your calendar display to match your workday. To make features you use frequently easy to access, you can add and delete items from toolbars and menus. You can also set specific preferences for a variety of features, including the view that appears when you start SalesLogix and the prompts you see when scheduling activities.

In some cases, you must specify your preferences before you can use a SalesLogix feature. To send faxes from within SalesLogix or to use e-mail, you must set the fax provider and e-mail options. To use form letters, you need to set the default document templates for the items on the Write menu.

Once you become familiar with SalesLogix, take some time to explore these options and experiment with different settings.

Select your startup settings

You can set several options to activate SalesLogix features automatically when you start the program. To set these options, select Options from the Tools menu and set each option as shown in the following table.

<i>To:</i>	<i>Click this tab:</i>	<i>And:</i>
Select the view that appears when you start SalesLogix	General	Select a view from the Show On Startup drop-down list.
Select the group that is current when you open the Account, Contact, or Opportunities view	Main View	Select a group from the Contacts, Accounts, and Opportunities drop- down lists.
Select the default owner for all accounts you create	Main View	Select an owner from the drop-down list.
Preserve changes you make in your view grid layouts	General	Make sure the <i>Save Grid Layouts</i> check box is selected.
Display a confirmation message before you delete an item	General	Check the <i>Confirm Deletions</i> check box.
Run processes when you start SalesLogix	System	Check the <i>Run Process Manager on Startup</i> check box.
Automatically roll over overdue activities to the next day	Activities	Select an activity type and then check the <i>Rollover on startup</i> check box. When you start SalesLogix, the Activity Manager dialog displays the overdue activities you can roll over.

Customize your workspace display

To change colors and fonts in your workspace and hide or display Tool Tips:

- ◆ Select Options from the Tools menu, and click the General tab.
- ◆ You can select colors for the navigation bar, view title bars, the current day in the Day and Month views of your calendar, and the highlight used for days with scheduled activities in the month displays on the Day view.

Open the drop-down list in each field to see the available colors. Select a color and click OK. When you click OK to close the Options dialog, the new colors are displayed in your workspace.

- ◆ You can select fonts for the text display in the view title bars and for clickable text.

Open the drop-down list in each field to see the available fonts. Set the font options and click OK. When you click OK to close the Options dialog, the new fonts are displayed in your workspace.

- ◆ To hide or display Tool Tips—the brief descriptions that pop up when you move the mouse pointer



over a button—check or clear the Hide Tool Tips check box.

To change the colors of the toolbars in your workspace:

1. Right click in a toolbar and select Properties from the shortcut menu.
2. Click the Color tab.
3. Select a color for the toolbar and a color for the toolbar docking area. The default color for both is BtnFace (gray).
4. Click OK to see the new colors.

To rearrange the toolbars in your workspace:

1. Click a toolbar (do not click a button) and drag it out of the toolbar docking area.
2. Change the toolbar orientation from horizontal to vertical by moving the mouse pointer to the edge of the toolbar. When the mouse pointer becomes a double-arrow, you can drag horizontally or vertically to change the orientation.

Set your activity and scheduling options

1. Select Options from the Tools menu.
2. Click the General tab.

<i>Check:</i>	<i>To:</i>
Disable Alarms	Eliminate notification of upcoming activities.
Check Availability	Have SalesLogix check your calendar for a previous commitment before adding an activity to your schedule.
Confirm Event Reschedule	See a confirmation prompt when you reschedule an event.

3. Click the Activities tab and select an activity type. For each type of activity:
 - ◆ Set the items you want to be prompted to enter when scheduling an activity. For example, if you select Meetings and set Date to Month, SalesLogix displays a mini-Month view, including lists of scheduled events and activities, when you schedule a meeting. You select the date you want on the calendar. If you set Date to Calendar, you see only the calendar portion of the Month view; if you set it to Week, you select a date from the Week view. If you choose Off, no prompt for the date is displayed. It's a good idea to turn on these prompts so you don't forget to enter information when you schedule an activity.

- ◆ Check the *Rollover on startup* check box to transfer overdue activities to the next day. When you start SalesLogix, the Activity Manager dialog informs you of any activities that were not completed at their scheduled time.
- ◆ In the Default Alarm Settings area, set the length of time before an activity that you want to receive notification. If you check the *Enabled when created* option, the alarm settings are automatically filled in whenever you schedule the selected type of activity.

Set your calendar options

1. Select Options from the Tools menu and click the Calendar tab or right click in any Calendar view and select Options from the shortcut menu.
2. Set the following options:

Drag Default	In the Day and Week views, when you click the timeline and drag, SalesLogix assumes you want to schedule an activity. If you usually schedule one type of activity, select it from the Drag Default drop-down list; SalesLogix displays the Schedule dialog for that activity when you click and drag on the timeline. If this option is set to Choose, SalesLogix displays a dialog so you can select Meeting, Phone Call, or To-do.
Days of History to Show	Specify how many days of history to display on the Calendar.
Double-click	Choose to open the Contact view or the Edit Activity dialog when you double-click a scheduled activity.
Month Displays	Choose Activity List to display specific activities or Day at a Glance to display a mini-timeline of each day in the Month view.

Calendar Shows	Choose Month only to display only the current month or 5 week view to display the month plus the adjacent weeks in the Month view.
Go To Contact	If you are in the calendar with an activity selected, you can right click and select Go To Contact from the shortcut menu to open the Contact Detail view for the contact involved in the activity. Choose Create Lookup to go to the Contact view and create a lookup where the contact in the activity is the only active contact. Choose Use All Group to go to the Contact view with the All Contacts group active.

3. Define your work week by selecting the check boxes for the appropriate days in the Work Week area and entering Day Start and Day End times in the Calendar Display area. The time period you select for each selected day is displayed with a white background in your calendar; days and times outside of your selection have a gray background. You can schedule activities in the white or gray areas.
4. In the Activity Display area, select the items you want to see listed for each scheduled activity in the Day and Week views.
5. In the Calendar Display area, select the:
 - ◆ combination of gridlines you want to display.
 - ◆ day you want to start the week in each view of the calendar.
 - ◆ type of week bars you want to display in the Month view. You can choose: Off, Buttons, Numbers, or Numbers and Text. When you click a button, it takes you to the associated Week view.

Set your lookup options

- ◆ When you initiate a lookup using the Lookup dialog, you can either display a list of items when you open the dialog or display an empty dialog. To display a list of items, select Options from the Tools menu. On the Main View tab, check the Auto Query on Open option in the Lookups area. If you are working with a group or the result of a lookup, and check the Within Current Group/Lookup option in the Lookup dialog, the list you see represents the current group.
- ◆ If you want lookups to be case sensitive (include capitalization when matching), select the Case Sensitive Lookups check box.
- ◆ To confine lookups to the current group, check the Within Current Group/Lookup option.

Set your opportunity options

When you add an opportunity, you enter information about the contacts, competitors, and products related to the opportunity. Use the Opportunity Wizard options to specify the order in which you are prompted for this information.

1. Select Options from the Tools menu.
2. Click the System tab.
3. In the Opportunity Wizard fields, choose the items you want shown first, second, and third from the drop-down list in each field, or select None if you do not want to be prompted to enter information.
4. Click OK to save the option settings.

Set your process options

1. To set your process options, select Options from the Tools menu and click the System tab in the Options dialog, or select Processes Scan Interval from the Tools menu.
2. Set your Process Manager options.

<i>Click:</i>	<i>To:</i>
Run Process Manager on Startup	Scan your active processes each time you open SalesLogix.
Execute VBA Scripts within Processes	Execute any VBA Scripts attached to a process.
Scan Processes every X minutes	Scan your active processes every X minutes.

3. Click OK.

Appendix C

Using the SalesLogix Word Processor

You can use the SalesLogix word processor to work with templates or to create documents from scratch. The word processor provides tools you can use to manage, edit, format, and produce documents.

To use the SalesLogix word processor, make sure it is selected as your default word processor. (Choose Options from the Tools menu and click the System tab.) To open the word processor, select a document from the Write menu. When you finish using the word processor, select Close from the File menu or click the close box to return to SalesLogix.

You can work with documents created in other word processors by saving them as .rtf files, opening them in SalesLogix, and then editing them. If you do this, you may need to reformat the document in the SalesLogix word processor.

Manage documents

Use the items on the SalesLogix word processor File menu to create a new document, open an existing document, or save a document or template.

<i>Choose:</i>	<i>To:</i>
New	Create a new document. The current document or template is replaced by a blank page. You cannot add merge fields to a document. If you want to add fields, you must use a template.
Open	Open an existing document. You can open any document that is saved as an .rtf file.
Save	Save a document.
Save As	Save the document under a new file name.

Print, e-mail, or fax a document

After you compose a letter, memo, or fax, use the items on the SalesLogix word processor File menu to print, send, or fax the document.

<i>Choose:</i>	<i>To:</i>
Printer Setup	Change the default printer setup for the SalesLogix word processor.
Print Preview	See how the document looks when printed. Click Close to return to the document.
Print	Print the document using your printer settings.
E-mail	E-mail the document to the contact.
FAX	Fax the document to the contact.

If e-mail and fax are not enabled on your system, these options do not appear on the menu.

Edit a document or a template

Use the items on the Edit, View, and Insert menus to edit a document or template.

<i>Choose:</i>	<i>To:</i>
<i>Edit Menu</i>	
Cut	Remove the selected text from the document and place it on the clipboard.
Copy	Place a copy of the selected text on the clipboard.
Paste	Insert the contents of the clipboard into the document.
Select All	Select the entire content of the document.
Find	Search the document for a word or phrase.
Replace	Search the document for a word or phrase and replace it with other text.
<i>View Menu</i>	
Merge Fields	Add merge fields to a template.
Ruler	Turn the ruler display on or off.
<i>Insert Menu</i>	
Page Break	Insert a dashed line to indicate a page break.

Insert a picture in a document or template

You can insert any bitmap graphic into a document or template.

1. Position the cursor at the location where you want to insert the picture.
2. Select Picture from the Insert menu.
3. In the Open Graphic File dialog, select the picture you want to insert and click OK.
4. When the picture appears on the page, double-click to select it.
5. To size the picture, drag the size box in the lower right corner.
6. To position the picture, use the Alignment and Paragraph items on the Format menu, or press the TAB key.

Format a document or template

Use the items on the Format menu to set up page layout and select fonts and text styles. You can apply formats to selected text or to merge fields.

<i>Choose:</i>	<i>To:</i>
Style	Apply a text style to the selected text or merge field.
Alignment	Align the selected text, merge field, or picture.
Font	Select a font, font style, font size, strikethrough, or underline effects, and color for the selected text or merge field.
Paragraph	Set indents and spacing for the selected paragraph.
Page	Choose the paper size and set margins.

Check your spelling

1. From the SalesLogix word processor, select Spelling from the Tools menu, right click and select Spelling from the shortcut menu, or press F7.

SalesLogix scans the document. When it finds a word it doesn't recognize, it appears in the *Not found* field of the Spelling dialog.

2. Type the correct spelling of the word in the *Change To* field or double-click a word from the list of suggestions. Or:

Click:	To:
Ignore	Leave the word as it currently appears.
Ignore All	Leave all occurrences of the word in the document as they currently appear.
Change	Change the word to the spelling you entered in the <i>Change To</i> field.
Change All	Change all occurrences of the word to the spelling you entered in the <i>Change To</i> field.
Add	Add the word to your personal dictionary.
Cancel	Stop the spelling check and return to the document.

3. Continue to correct words until the entire document has been checked.

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Appendix D


Using Microsoft Word with SalesLogix

SalesLogix gives you a choice of using the SalesLogix word processor or Microsoft Word to prepare correspondence. Before you can use Word, it must be your selected word processor. Be sure you are using Microsoft Word for Windows '95 version 7.0 or later.

When you use Word with SalesLogix:

- ◆ You must use the SalesLogix word processor to build templates. If you want to use text from another document as the basis for a SalesLogix template, you can save the document as an .rtf file and open it in SalesLogix. This will preserve the text, but not the formatting, because the SalesLogix word processor does not support all .rtf formatting features. You will need to reformat the document in SalesLogix. You can also copy text from any document to the Windows clipboard and paste it into a SalesLogix template.

To load text from a Word .rtf file:

1. Save the document as an .rtf file in Word.
2. In SalesLogix, select Templates from the Write menu and click .
3. With the Document view open, select Load Template from File from the File menu. Find the document you saved as an .rtf file and click Open. Add merge fields to the document and save it.
4. Make any necessary changes.
5. Name the template, select the family (folder) where you want to save it, and assign yourself as the owner.

To use the template, select it as one of the default templates. When you select the template from the Write menu, SalesLogix opens Word. The selected template is displayed with the merge fields containing information about the current contact.

- ◆ When you save a document in Word, it is saved in the directory you specify in Word and a history item is entered for the contact in SalesLogix.
- ◆ If your e-mail and fax software is “Word enabled,” you can fax or e-mail a SalesLogix document directly, just as you would send any other document from Word. Documents you fax or e-mail are recorded as history items in SalesLogix.

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