

# SALESLOGIX

- SALES
- MARKETING
- CUSTOMER SERVICE
- SUPPORT

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

## FEATURES

SalesLogix Support provides powerful capabilities for tracking, managing and resolving customer support issues.

- Account and Contact Management
- Ticket Management
- Support Contract Management
- SpeedSearch / Knowledge Base
- Defect Tracking
- Return Material Authorizations (RMA)
- Standard Problems and Resolutions
- Procedures
- Product Tracking
- Sales and Support Integration
- Reporting
- Lookups and Groups
- Notification and Alerts
- Web Customer Portal

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software

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## SALESLOGIX SUPPORT

The screenshot displays the SalesLogix Support application interface. The window title is "Support - [Ticket - [001-00-000032]]". The interface includes a menu bar (File, Edit, View, Insert, Lookup, Tools, Window, Help) and a toolbar with buttons for New, Save, Delete, Cancel, Print Reports, SpeedSearch, Send Email, Place Call, and Help. The main content area shows a ticket management form for Ticket ID 001-00-000032. The form includes fields for Account (Abbot Ltd), First Name (Dean), Last Name (Drew), Phone (312) 555-7843, E-Mail (ddew@abbotdemo), and Source (Phone). It also features dropdown menus for Status (In Process), Urgency (Medium), Area (Hardware), Category (CD/DVD), and Issue. A "Public Access" dropdown is set to "1-Customer". The form includes a "Duplicate" button and a "Resolved 1st Call?" checkbox. Below the form, there are tabs for Detail, Activity, Audit Trail, RMA, Defects, Contracts, Products, Comments, and Attachments. The main content area is divided into two panes: "Problem Description" and "Problem Resolution". The "Problem Description" pane contains a message from Samantha Birnk dated 6/19/2004 3:34:47 PM, reporting an issue with DVD drives on new Tecra laptops. The "Problem Resolution" pane contains a response from Samantha Birnk dated 6/20/2004 9:05:35 AM, providing instructions for resolving the issue, including a BIOS upgrade and a display driver update. The interface also shows a sidebar with icons for Ticket, Account, Contact, Defect, Contract, RMA, Procedures, Products, and Reports. The status bar at the bottom indicates the date and time (Thursday, May 13, 2004 4:30 PM), the user (Administrator), and the version (EXTERNAL\_BETA).

*SalesLogix Support provides easy access to all the information and resources your support reps need to quickly resolve issues.*

Sales and Marketing deliver customers to your business, but your Customer Support department keeps them with you for the long haul. With the costs of acquiring new customers 5-10 times higher than retaining existing customers, support solutions designed to help foster lasting relationships with your customers have a tremendous impact on the bottom line.

To deliver beyond your customers' expectations and exceed your support department's performance goals, service professionals must be able to resolve issues quickly and effectively. SalesLogix Support provides the advanced issue tracking and resolution tools as well as access to relevant customer data – including products purchased, ticket and defect history, and maintenance contract status – needed to maximize the effectiveness of each interaction with your customers.

SalesLogix Support also provides powerful self-service support solutions via the Web, reducing transaction costs and allowing your customers around the world to get the support they need, how and when they need it.



## SalesLogix Support

### Streamline Support Center Activities

SalesLogix Support provides advanced issue tracking and resolution tools, enabling you to exceed customer expectations and internal performance goals. Manage call and defect tracking, service contract renewals and return material authorizations (RMAs). SalesLogix also provides escalation alerts via phone, e-mail or pager, based on business rules you define.

### Keep Critical Knowledge at Your Fingertips

The powerful SpeedSearch knowledge base in SalesLogix helps support professionals quickly locate resolutions to customer issues. Support reps can efficiently search resources such as prior call tickets, standard problems and resolutions, and stored procedures, or access reference materials such as manuals, FAQs, and white papers.

### Help Customers Help Themselves

Reduce costs by empowering customers to find the answers they need – online at their convenience. The SalesLogix Web Customer Portal puts the same intelligence used by your support team on your Web site, along with a powerful search engine that simplifies the self-service experience. With SalesLogix Support, customers and employees around the world can also create and track support tickets online, anytime.

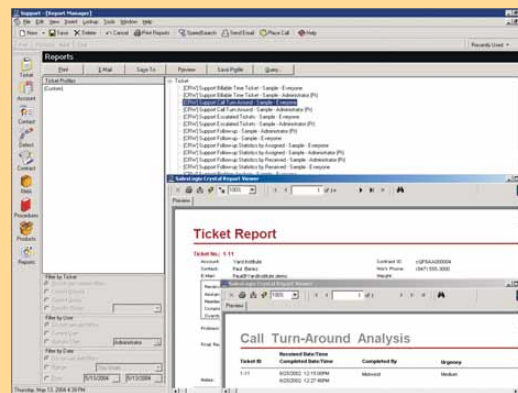
### Share Information with Sales and Marketing

A record of every support interaction is stored within each customer's account history in SalesLogix, so employees from Sales and Marketing to Accounting and Finance can share a complete view of all account activity.

Whether you're a software company that meticulously tracks bugs and feature requests, or an appliance manufacturer concerned with efficiently managing RMAs, your support team will have the resources it needs to quickly resolve issues and build lasting and profitable customer relationships.

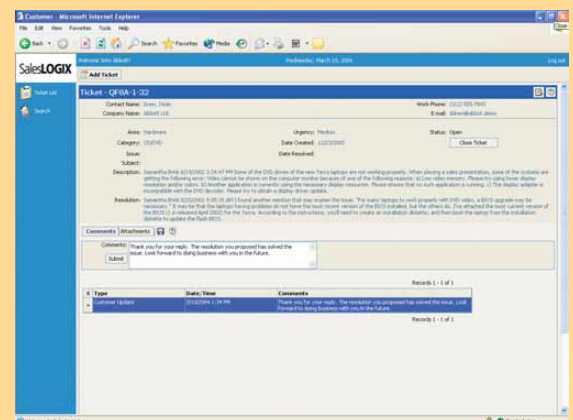
## PRODUCT BENEFITS

- Maximize effectiveness of support center interactions
- Reduce per-transaction costs
- Deliver effective self-service solutions
- Gather and retain critical intelligence
- Build and enhance customer relationships
- Capitalize on new selling opportunities
- Extend access to support resources globally
- Personalize the support experience



Analyze the effectiveness of support center activities and report on key metrics such as call response times and defect history.

The SalesLogix Web Customer Portal enables customers to create and track support tickets and search for solutions online, anytime



## Features

### Account and Contact Management

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

### Ticket Management

- Automatically assign tickets to the appropriate resource based on area of expertise
- Record the status, urgency and nature of the issues, and track time-to-resolution
- Store and review comments, attachments and an activity history
- Solve issues then archive resolutions in the knowledge base for future reference

### Support Contract Management

- Track contract details including ID#, type, service level, amount and end date
- Manage multiple contract types – per incident, time period or dollar amount
- “Punch-in” and “Punch Out” to track time spent on individual support issues

### SpeedSearch / Knowledge Base

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

### Defect Tracking

- Track defect details including ID#, type, severity, priority, status and description
- View associated tickets, Return Material Authorizations (RMA)s, attachments and product information

### Return Material Authorizations (RMA)

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

### Standard Problems and Resolutions

- Access solutions to frequently recurring issues quickly and efficiently
- Automatically populate resolutions into tickets after performing a lookup

### Procedures

- Document common processes used in solving customer problems
- Assign a title and subject, create date and confidence level for each procedure

### Product Tracking

- Associate products with accounts, tickets, defects, contracts or RMAs
- View information on product codes, names, vendors and pricing

### Sales and Support Integration

- Arm sales reps with a history of their customers' support issues and details
- View the status, urgency, issue, ticket ID, and dates for open and closed tickets

### Reporting

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

### Lookups and Groups

- Perform custom queries to locate records and update information
- Create groups based on results of lookup to track ongoing status

### Notification and Alerts

- Monitor data proactively and receive alerts when service conditions are triggered
- Receive alerts instantly via e-mail, fax, pager, PDA, phone or Web browser

### Web Customer Portal

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



*"SalesLogix Support empowers our support reps to resolve customer issues quickly and accurately, which has a positive impact on customer loyalty."*

*Dave Stuttard  
Vice President of  
Application Solutions  
Avnet*

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



## SalesLogix Support

For more information, go to:

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

Or contact your certified  
SalesLogix Business Partner.

To find a Business Partner in  
your area, call 800-643-6400.

To register for an online  
demonstration to see how  
SalesLogix can help your  
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## About SalesLogix

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

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

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

SalesLogix, the SMB CRM leader with more than 6000 customers worldwide, is part of the Best Software family of integrated business management solutions.

## About Best Software

Best Software offers leading business management products and services that give more than 2.3 million small and mid-sized customers in North America the insight for success throughout the lives of their businesses. Its parent company, The Sage Group plc (London: SGE.L), supports more than 4.3 million customers worldwide. Its first half revenue run rate was the equivalent of over \$1 billion in annual revenues. For more than 25 years, Best Software has delivered easy-to-use, scalable and customizable applications through its portfolio of leading brands, including Abra, ACCPAC, ACT!, BusinessVision, CPASoftware, FAS, MAS 90, MAS 200, MIP, Peachtree, SalesLogix, Timberline, among many others. For more information, please visit the Web site at [www.bestsoftware.com/moreinfo](http://www.bestsoftware.com/moreinfo) or call (866) 308-BEST.