

# Sage SalesLogix Visual Analyzer

**Sage SalesLogix Visual Analyzer is a comprehensive, interactive business analytics tool that allows you to bring your Sage SalesLogix data to life. Sage SalesLogix Visual Analyzer delivers customisable dashboard views of key Sage SalesLogix data, for a low cost of deployment, providing your organisation the insight needed to extend your competitive advantage.**

## Your Need for Intelligent, Interactive Reporting

The ability to make fast, reliable decisions based on accurate and usable information is essential to most business enterprises. The Sage SalesLogix Visual Analyzer solution was specifically designed to support deep customisation of dashboard features to illustrate your business state-of-health in a format that is meaningful to you. There are ten pre-built dashboards to choose from, depending on how you and your team prefer to slice and dice critical business analytics. Sage SalesLogix Visual Analyzer fluidly pulls together your existing customer data residing in the Sage SalesLogix database, into a consistent, single point of analysis for everyone – from executives, to sales, marketing, and service employees.

Sage SalesLogix Visual Analyzer enforces the security settings your administrator has put in place for Sage SalesLogix. Therefore, when you change a security setting in Sage SalesLogix, it automatically changes in Sage SalesLogix Visual Analyzer, streamlining work for administrators and ensuring users will see only the data their security profile allows.

## Powerful Performance to Optimise Your Investment in People

Sage SalesLogix Visual Analyzer offers a connection to link up with customer data stores, from back office systems to off-the-shelf applications. This extension of your established customer data intelligence enables key people in your organisation to stay informed, ensuring they are focused on the right business issues.

This reporting integration is powered by a fully optimised system that speeds data load time, even when your data sources are very large. Sage SalesLogix Visual Analyzer uses a separate data repository, or warehouse, so the performance of your main Sage SalesLogix database is not affected. Data from this repository file often loads 10–100 times faster than a direct database load, ensuring optimum performance.

Sage SalesLogix is an integrated customer relationship management (CRM) suite that includes Sales, Marketing, Customer Service, and Support automation solutions. Sage SalesLogix Visual Analyzer is a distinctly powerful tool that allows you to quickly create and deploy highly manageable dashboards to gain insightful business intelligence.

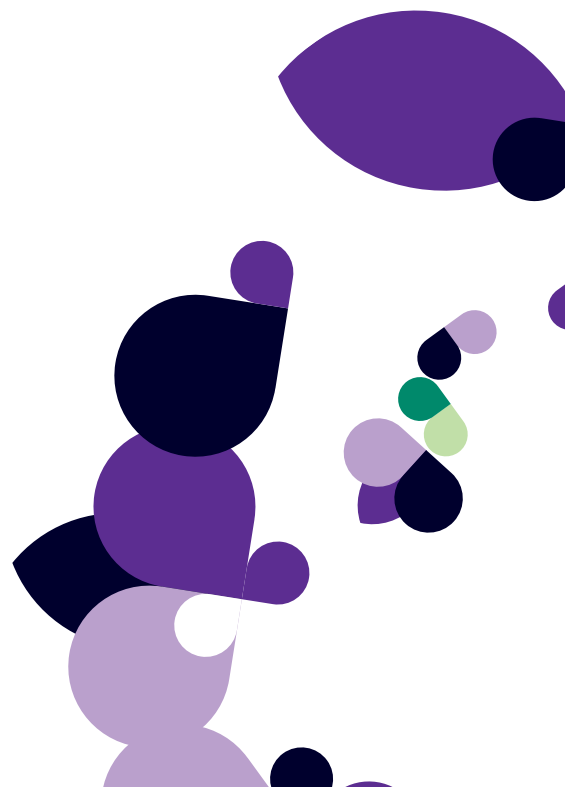
## Features:

Sage SalesLogix Visual Analyzer provides comprehensive graphical-views of key Sage SalesLogix data.

- Interactive Customisable Dashboards –
  - KPI Dashboard Maps
  - Dashboard Ranking Dashboard
  - Forecast Dashboard
  - Win/Loss Dashboard
  - Opportunities Dashboard
  - Activities Dashboard
  - Marketing Dashboard
  - Customer Service Dashboard
  - Details Dashboard
- Seamless Integration of Sage SalesLogix Data
- Integrated Sage SalesLogix Database Security



The KPI dashboard provides an instant picture of the effectiveness of your business.



# Dashboard View Features

## Benefits:

- Analyse critical business metrics with customisable dashboard views that illustrate your organisation's state-of-health.
- Make fast, reliable business decisions based on accurate and usable information to help shift strategic priorities.
- Optimise your investment in people with a reporting connection that links up with customer data stores to extend business intelligence and help monitor changes or trends.

## KPI Dashboard

Considered the “home base” of Sage SalesLogix Visual Analyzer, the KPI (key performance indicator) dashboard is the main summary page for all critical business metrics. Easy-to-understand gauges illustrate the current health of selected components of your organisation, such as total sales or opportunities year over year. Based upon the security viewing profile established, you are able to drill down from the Dashboard view into the selected transaction details for further analysis.

Starting from the KPI dashboard, you can navigate to the nine other dashboard views available in Sage SalesLogix Visual Analyzer. More than just static views of data, Sage SalesLogix Visual Analyzer supports a connection with pre-existing customer data stores that transform silos of disconnected data into actionable business insight

## Forecast Dashboard

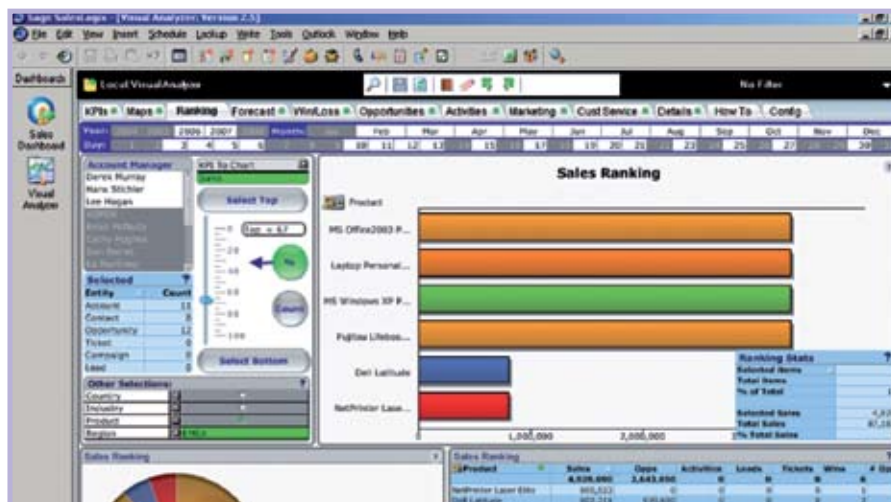
Understanding sales trends and making appropriate, timely adjustments can have a big impact on sales performance. The Forecast dashboard allows you to analyse your sales pipeline, forecasts, and close rates. You can determine: the stage at which opportunities are being delayed, where to introduce new programs to help bolster sluggish sales, and which sales representatives require assistance to help meet their goals.

To further illustrate potential sales opportunities, forecasts can be segmented by sales representative, product, or region. A historical analysis of past sales provides the support to accurately estimate future sales growth.

## Ranking Dashboard

The Ranking dashboard provides a list or ranking for any KPI you may choose, such as: Accounts, Sales Representatives, Opportunities, Products, or other entities in the Sage SalesLogix database.

A popular ranking feature is the Top Ten Accounts, but you have the flexibility to rank whatever set of metrics is most meaningful to you and your business. You can also choose to rank from the bottom up, identifying customers with slower performance that need additional sales and marketing support. Once the list is established, you can create a Sage SalesLogix Group and then launch a targeted marketing campaign to that Sage SalesLogix Group.



The Ranking dashboard allows you to see at-a-glance your Top Ten Accounts or reverse the order to show slower performers.

## Win/Loss Dashboard

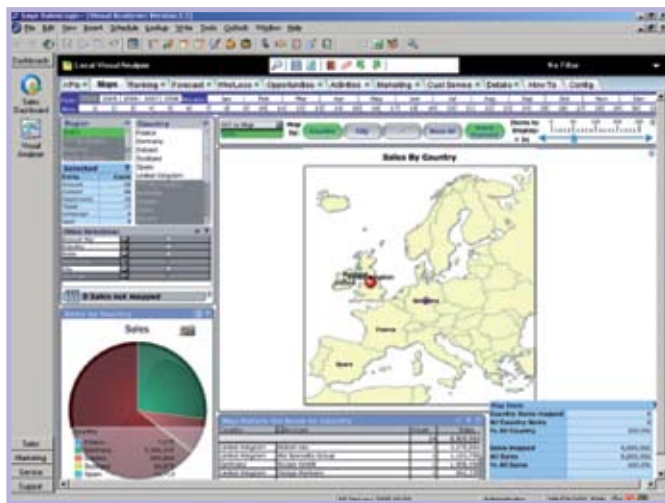
The Win/Loss dashboard helps you understand how well you and your sales team are closing opportunities. The graphical chart shows win and loss units by month, while the grid positioned below provides detailed information for each opportunity won or lost. This perspective enables you to consider your company's performance as compared to that of the general market. As a result, your strength in a particular industry could shape your strategic goals and objectives.

## Opportunities Dashboard

Your sales team will especially appreciate the Opportunities dashboard, as they can identify the opportunities with the best chance of closing in the current period. With just a couple of clicks, they can obtain a list of all opportunities in their territory that are in the mid stages of the sales process. This target list can then be built onto a Sage SalesLogix Group to be easily accessed while actively working the opportunities.

## Maps Dashboard

The geographic Maps dashboard shows analysis information overlaid on a map. Data can be viewed by region, country, and city, and then drilled down further in a specific region to conduct territory analysis.



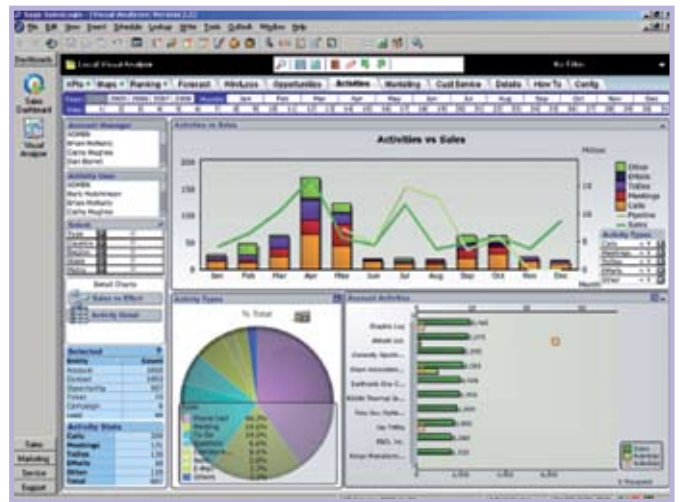
The Maps dashboard provides a visual perspective on geographical sales support and performance.

## Activities Dashboard

The Activities dashboard provides an introspective view into the types of prospect touches and communications it takes on average to close a sale. It also explores the number of communications it takes to close a sale. Consider the success rate of face time versus phone calls versus e-mails, and the power of those personal interactions with customers. If you are an Account Manager, you can select a customer record and receive a historical list of previous contact with your client.

## Marketing Dashboard

The key to continual growth in a sales pipeline is strong marketing initiatives. The Marketing dashboard tracks the vital metrics required to determine the effectiveness of marketing programs. This view will help you analyse campaign response rates, sales success, and conversion rates—from mailing list prospect to interested client.



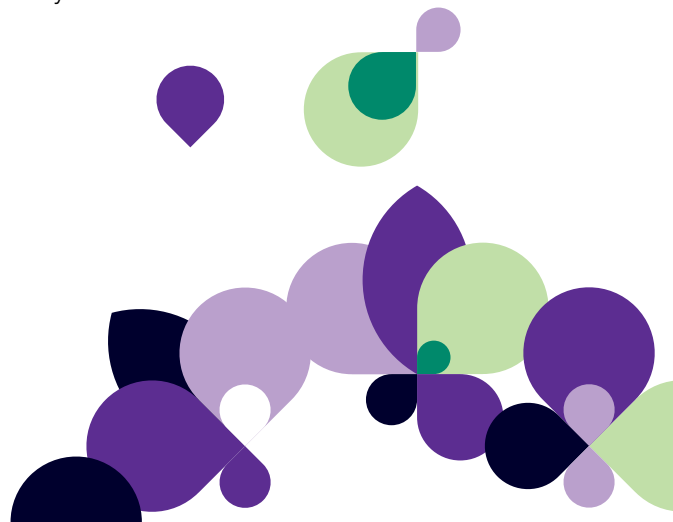
Utilise the Marketing dashboard to track campaign performance and make adjustments as needed to maintain a strong pipeline of leads.

## Customer Service Dashboard

The backbone to any customer relationship management tool is the ability to track and analyse the Customer Service experience. This dashboard gives you an instant picture of service levels with an analysis of reasons for customer calls, resolution rates, and average length of time to resolve an issue. Drill down to the details of a particular case or ticket to explore the historical profile and initiate an informed response.

## Details Dashboard

The Details dashboard provides a single-screen view of the Sage SalesLogix details for the selected record. It presents the Account Detail view with all the tabs spread out on a single page, so that every data point related to the Account can be viewed. The Maps dashboard provides a visual perspective on geographical sales simultaneously.



## About Sage SalesLogix

Sage SalesLogix is the leading customer relationship management application that enables small to mid-sized businesses to cultivate profitable customer relationships by increasing sales and marketing performance and maximising customer satisfaction and loyalty.

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

Flexible and easy to use, Sage SalesLogix readily accommodates growth and changing business requirements. It delivers deep, rich customisation capabilities, high levels of end-user adoption, and low total cost of ownership across all deployment methods including Web, Windows, and mobile devices.

With more than 300,000 users at over 8,500 companies worldwide, Sage SalesLogix is the leading CRM solution for small to mid-sized businesses and divisions of larger enterprises, and is part of the Sage family of integrated business management software.

## About Sage

Headquartered in Newcastle upon Tyne, Sage (UK) Limited is a subsidiary of The Sage Group plc, a leading supplier of business management software and services to 5.4 million customers worldwide.

From start-ups to larger organisations, Sage makes it easier for companies to manage their business processes.

Formed in 1981, the Group was floated on the stock exchange in 1989 and now employs 13,000 people in its market leading companies worldwide.

Working with its community of UK accountants, business partners, developers, banks and retailers, Sage is exclusively focused on providing UK businesses in all sectors with specific, scalable software and services to help them manage their finances, their people, their customers, their suppliers, their core operations and to plan their future business success.

In the UK alone, Sage employs over 1600 people and provides software and services to over 700,000 small and medium-sized businesses.

These products range from accounts, payroll, forecasting and business intelligence to customer relationship management, e-business and help for start-ups. Services include Excel Support, HR Advice, Health and Safety Advice and training courses.



For more information, please visit [www.sage.co.uk/saleslogix](http://www.sage.co.uk/saleslogix)  
Alternatively, contact your certified Sage SalesLogix Business Partner.  
To find a Business Partner in your area call **0845 111 9988** or email [crm@sage.com](mailto:crm@sage.com)  
To register for an online demonstration to see how Sage SalesLogix can help your business, go to: [www.sagecrmsolutions.com/demo/sagesaleslogix](http://www.sagecrmsolutions.com/demo/sagesaleslogix)



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