



## SAGE CRM SALESLOGIX

## PIVOT REPORTER

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Sage CRM SalesLogix is an integrated customer relationship management (CRM) suite that includes Sales, Marketing, Customer Service and Support automation solutions. Sage CRM SalesLogix Pivot Reporter extends the reporting capabilities in Sage CRM SalesLogix for rapid analysis of customer data and operational performance.

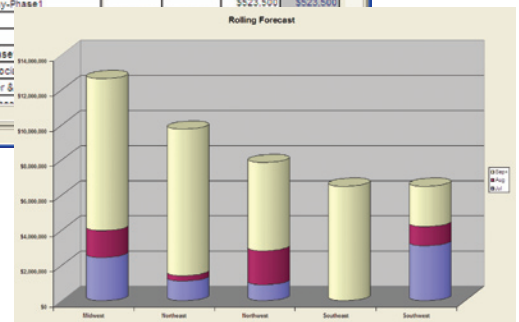
#### FEATURES

Sage CRM SalesLogix Pivot Reporter is a powerful, easy to use tool for creating and analyzing custom pivot-style reports using data in Sage CRM SalesLogix.

- Sales Pipeline & Forecast Reports
- Marketing Campaign Reports
- Service & Support Metrics
- Custom 'Pivot-Style' Reports
- Sample Report Templates
- Drag & Drop User Interface
- One-Click Export to Excel
- Advanced Security

Pivot Reporter for SalesLogix - [Pipeline: Rolling Forecast by Team]

Team	Account Mgr.	Account	Opportunity	Month			Sum
				Jul	Aug	Sep+	
Midwest	Lee Hogan	Abbott Ltd	Abbott Ltd-Phase2		\$199,500		\$199,500
		Abbott WorldWide	Abbott WorldWide-Phase1			\$4,663,500	\$4,663,500
		Chicago Auto Products	Chicago Auto Products-Phase1		\$89,770		\$89,770
		Clayco Manufacturing	Clayco Manufacturing-Phase1			\$199,500	\$199,500
		Columbus America	Columbus America-Phase1		\$2,399,400		\$2,399,400
		Farmco Industries	Farmco Industries-Phase1		\$59,900		\$59,900
		Fleet Group	Fleet Group-Phase1			\$1,229,700	\$1,229,700
		Flow Matic	Flow Matic-Phase2			\$261,000	\$261,000
		Horizon Acceptance Corporation	Horizon Acceptance Corporation-Phase1			\$1,413,600	\$1,413,600
		Intrinsic International Capital	Intrinsic International Capital-Phase1			\$854,800	\$854,800
		Mobile Relief	Mobile Relief-Phase1			\$359,100	\$359,100
		Vegas Vision	Vegas Vision-Phase1			\$396,900	\$396,900
Vivella Apparel Company	Vivella Apparel Company-Phase1			\$523,500	\$523,500		
Sum		Sum					
Northeast	Dan Barret	Account Graphics	Account Graphics-Phase				
		American Electric Associates	American Electric Associ				
		Apex Industrial Washer & Dryer, Inc.	Apex Industrial Washer &				
		Budis Pull Company	Budis Pull Company-Phase				



Sage CRM SalesLogix Pivot Reporter creates management reports such as a Rolling Forecast simply by dragging and dropping fields. Reports can also be exported to Excel with one click.

### Business Insight from your Customer Data

Your Sales, Marketing and Service teams constantly record and update customer information in Sage CRM SalesLogix. It is critical to have access to this information to make informed, timely business decisions. However, creating new reports on the fly – without technical resources – can be challenging.

### Design Custom Reports in Minutes

Sage CRM SalesLogix Pivot Reporter, a powerful yet easy to use reporting and analysis tool, offers a simple solution. Now, any Sage CRM SalesLogix user can quickly create custom 'pivot-style' reports without any special report writing or database skills. Create pipeline reports grouped by sales person or team, marketing lead source and campaign status reports, support ticket metric reports and more.

Simply drag and drop fields or modify one of over 20 sample reports to meet your unique reporting needs. Reports update instantly after dragging additional fields or changing captions. You can also export reports to Excel with a single click for additional analysis.

### Simple, Fast, Flexible

Sage CRM SalesLogix Pivot Reporter can be installed quickly, so you can immediately begin analyzing customer data critical to managing the health of your business. No bundles to install. No customizations required.



# Sage CRM SalesLogix

Pivot Reporter

## FEATURES

### Benefits for Sales

- Create pipeline reports by sales person or team
- Generate “rolling months” forecasts to reflect current and future months
- Track wins, losses and the number of days required to close opportunities
- Monitor sales calls made by day, week, month and time-of-day

### Benefits for Marketing

- Report on lead sources and the status of marketing campaigns
- Generate Excel lists of contact mailing information for labels
- Track sales activities by region, sales team or rep

### Benefits for Service & Support

- Track the number of tickets opened by week, month, quarter or year
- Analyze tickets by time-of-day, day-of-week or day-of-month
- Create reports to reflect the Area, Category and Issue of closed tickets

### Benefits for Product Management

- Assess products in the pipeline and measure sales by product or product family
- Discover reasons opportunities are won or lost

## About Sage CRM SalesLogix

Sage CRM 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, Sage CRM SalesLogix delivers integrated Sales, Marketing, Customer Service, and Support automation solutions that adapt to your unique customer acquisition, retention, and development processes.

Sage CRM 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, Sage CRM SalesLogix readily accommodates growth and changing business requirements.

Sage CRM SalesLogix, the SMB CRM leader with more than 7,300 customers worldwide, is part of the Sage Software family of integrated business management solutions.

## About Sage Software

Sage Software has been responding to the needs, challenges, and dreams of small and midsized businesses like yours for over 25 years. With a complete range of business management solutions and services, Sage Software helps companies improve customer relationships, reduce costs, and automate and integrate a variety of operational activities. Look to Sage Software for fully integrated business management applications that deliver high performance, advanced functionality, cross-product integration, and unmatched freedom of choice.

Sage Software solutions support the specialty needs of a broad scope of industry segments, including manufacturing, distribution, construction, real estate, nonprofit, and professional services. Today, over 2.4 million North American customers run Sage Software solutions. Its parent company, The Sage Group plc (London: SGE.L), supports 4.5 million customers worldwide and has revenues exceeding \$1 billion. Together, with its network of business partners, Sage Software provides the ongoing support and service small and midsized businesses need to achieve tangible business results.

For more information, please visit the Web site at [www.sagesoftware.com](http://www.sagesoftware.com) or call **800-854-3415**.

For more information, go to:  
[www.saleslogix.com](http://www.saleslogix.com)

Or contact your certified Sage CRM SalesLogix Business Partner. To find a Business Partner in your area, call **800-643-6400**.



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