



Sage SalesLogix v7.5.2 | Client Feature Comparison

Feature	Windows	Web	Mobile
General User Features			
Perform Look-ups	✓	✓	✓
Right mouse click to functions	✓	✓	n/a
"Hot key" shortcuts to functions	✓		n/a
E-mail from contact record	✓	✓	✓
Mail Merge	✓	✓	n/a
Remote (disconnected) use	✓	✓	✓
Create Groups	✓	✓	n/a
Welcome Page/Personal Workspaces		✓	
Multi-tab expansion		✓	n/a
Associate attachments to activities	✓		n/a
Manage Tools drop-down menu (e.g., pick lists, etc.)	✓		n/a
Details Pane in Activities Workspace		✓**	
Unsaved data notification		✓**	
Visual indicators for attachments in Activities and Calendars		✓***	
Mass actions in Activities		✓***	
Sales			
Account and Contact management	✓	✓	✓
Automate sales processes	✓	✓	n/a
Opportunity management	✓	✓	✓
Activity management	✓	✓	✓
Lead capture	✓	✓	n/a
Lead qualification	✓	✓	through customizations
Lead conversion	✓	✓	through customizations
Literature fulfillment	✓		n/a
Schedule literature requests	✓	✓	n/a
Create sales orders	✓	✓	through customizations
Sales Orders Main View (separated from Opportunity View)		✓***	
View Opportunity Snapshot	✓	✓	
View Opportunity Statistics	✓	✓	n/a
Marketing			
Create Campaigns	✓	✓	n/a
Track Campaign responses	✓	✓	n/a
E-mail marketing	✓	✓	n/a
Campaign reporting	✓	✓	n/a
Perform lead-duplication upon conversion to opportunity	✓	✓	n/a
Perform lead-duplication upon import		✓	n/a
Associate activities to leads	✓	✓	n/a

Feature	Windows	Web	Mobile
Marketing (cont.)			
Automatic lead distribution	✓	✓	
Perform import actions to leads	✓	✓	
Create responses for leads tied to campaigns	✓		
Advanced campaign responses—not tied to leads	✓	✓	
Group Actions in Leads List view		✓**	
Customer Service & Support			
Create, edit, manage tickets	✓	✓	✓
View Tickets and related information (i.e., resolutions, service history, defects, assets, returns)	✓	✓	✓
Create, edit, manage Defects	✓	✓	through customizations
Create, edit, manage Contracts	✓	✓	through customizations
Manage Assets (associated products) for Account, Ticket, and Ticket Activity Parts	✓	✓	through customizations
SpeedSearch	✓	✓	
Dashboards & Reporting			
View key performance metrics such as pipeline status, open opportunities, and win rate	✓		✓
Generate Reports	✓	✓	n/a
Advanced Outlook Integration (functionality differs by client)			
Record e-mail to Sage SalesLogix history	✓	✓	✓ (Blackberry® Only)
Access Sage SalesLogix Address Book in Microsoft® Outlook®	✓		n/a
Attendee availability tab	✓		n/a
Add Contact to Outlook button	✓		n/a
Intellisync for synchronization of Contacts and Calendar items	✓	✓	n/a
Sage SalesLogix Exchange Link to synchronize Contacts, Calendar, and Tasks between Outlook and Sage SalesLogix for Windows, Web, and Mobile	✓	✓	✓
Administration/Customization			
Administrative “manage” menu screens (i.e., manage picklists, competitors, etc.)	✓		n/a
Administrative data maintenance screens (i.e., merge records, check for duplicates, etc.)	✓		n/a
Territory realignment	✓		n/a
Assign Contact processes	✓	✓	n/a
Process orchestration	✓	✓	n/a
Create, edit, and publish Mashups and embed anywhere within the Web Client	✓*	✓	n/a
Field Level Security	✓	✓**	
RESTful Web Services	✓*	✓	
Remote/Disconnected Client	✓	✓	
Lotus Notes compatibility	✓	✓**	
Firefox compatibility		✓**	
Enhanced Developer Experience (API Reference Guide, best practices document, new Developer Community)	✓***	✓***	✓***

*Requires New Web platform

**Requires Sage SalesLogix v7.5.1

***Requires Sage SalesLogix v7.5.2

“Sage SalesLogix has transformed the way we do business. Every opportunity is visible and accessible to everyone. We’ve got the facts right in front of us—there’s no hunting for a file folder.”

— Mike McGuire
Managing Partner and Vice
President of Sales Zink
Foodservice Group

About Sage SalesLogix

Your highest priority is to grow your business, and your business tools should help you achieve that goal. Sage SalesLogix provides a complete view of customer interactions across sales, marketing, customer service, and support so your teams can collaborate and respond promptly and knowledgeably to customer inquiries and opportunities. With flexible access options, powerful process automation capabilities, and a highly customizable platform, Sage SalesLogix is a comprehensive solution that will help you achieve stronger sales and a more successful business, now and into the future.

About Sage CRM Solutions

Sage CRM Solutions is a portfolio of market-leading applications consisting of ACT! by Sage, SageCRM, and Sage SalesLogix. Over 63,500 organizations and 3.1 million users worldwide rely on Sage CRM Solutions to develop profitable, long-term business relationships.