Sage SalesLogix | Dashboards and Reporting

Making effective, timely business decisions requires access to real-time performance indicators at all levels of your organization. Sage SalesLogix Dashboard and Reporting capabilities enable real-time insights for driving effective business decisions at all levels of your organization.

For Executive Management

Turn insight into action by analyzing performance, diagnosing potential problems, and identifying opportunities. Sage SalesLogix Dashboards provide a single, interactive location from which to view and analyze performance metrics for your entire organization. Sage SalesLogix also includes more than 50 pre-built reports covering key performance indicators across sales, marketing, service, and support.

For Sales Management

Access a real-time view of the sales pipeline in order to address weak areas and focus on top opportunities. Analyze sales team performance and win rates, identifying strengths and weaknesses for sales reps, regions, and other dimensions. Once you've identified an area that you want to analyze further, you can easily conduct historical and comparative analyses. You can also personalize your dashboard by simply dragging-and-dropping new content or selecting new filter criteria.

For Sales Professionals

Sage SalesLogix Dashboards provide a single location for instantly accessing the information critical to your success, such as top opportunities, closed deals, and other key indicators. Drill-down capabilities enable you to analyze specific data points in more detail, including accessing the related Sage SalesLogix records. Dashboard calendar and activity views help you manage your day-to-day activities and focus on your top priority tasks.

- View performance metrics, diagnose key issues, and identify opportunities from a single location with Sage SalesLogix Dashboards.

FEATURES

Pipeline Analysis

Top Opportunities

Closed Sales to Date

Win/Loss Analysis

Key Performance Indicators

Product Sales Performance

Product Sales Opportunities

Calendar and Activity Views

Drill-down Analysis

Pre-built and Custom Reports

BENEFITS

Real-time, Interactive Dashboards
- Gain deep insight into organizational and individual performance
- View performance metrics, diagnose key issues, and identify opportunities from a single location
- Analyze key performance metrics such as pipeline status, open opportunities, and win rate
- Identify top customers and opportunities
- Discover root causes for performance issues and take corrective action
- Perform ad-hoc analysis by simply changing filter or group criteria

Drill-down Analysis
- Drill down into detailed data for further analysis into trends
- Export dashboard data to Excel for further analysis
- Conduct historical and comparative trend analyses, such as period-to-date and year-to-year
- Manage your calendar, tasks, and activities directly within the dashboard
- Personalize dashboard content so each user gets exactly the information they need
- Drag-and-drop to view different dashboard performance metrics
- Create customized dashboard content

Pre-built and Custom Reporting
- Create report profiles for the common layouts your company uses
- Control report output through easily defined filters, including existing dynamic groups
- Create custom reports with Crystal Reports Designer
- Export report data to Excel and other popular formats for further analysis

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 Group plc
Sage is a leading supplier of business management software and services to 5.8 million customers worldwide. From small start-ups to larger organizations, we make it easier for companies to manage their business processes.

Sage
8800 N. Gainey Center Dr., Suite 200
Scottsdale, AZ 85258
www.sagecrmsolutions.com | 800-854-3415

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