



Sage SalesLogix v7.5.2 | Upgrade Comparison Chart

Feature	v6.2		v7.0		v7.2		v7.5	
	Win	Web	Win	Web	Win	Web	Win	Web
Sales								
Opportunity Management								
Opportunity Snapshot for quick summary of important details	✓	✓	✓	✓	✓	✓	✓	✓
Opportunity Statistics	✓		✓		✓		✓	✓
E-mail key opportunity data to managers with one click	✓	✓	✓	✓	✓	✓	✓	✓
Update multiple opportunities at one time	✓	✓	✓	✓	✓	✓	✓	✓
Input sales order	✓		✓		✓		✓	✓
Sales Orders Main View (separated from Opportunity View)								✓***
Input opportunity data such as description, estimated close, status, source, close probability, and products	✓	✓	✓	✓	✓	✓	✓	✓
Associate multiple contacts and competitors and select sales process	✓	✓	✓	✓	✓	✓	✓	✓
Add multiple products or product packages quickly and input discount and quantity	✓	✓	✓	✓	✓	✓	✓	✓
Set opportunity defaults at admin or user level to streamline input and ensure accuracy, including status, type, probability, and sales process	✓	✓	✓	✓	✓	✓	✓	✓
Export opportunity information to Microsoft® Excel® or launch new opportunity reports instantly	✓	✓	✓	✓	✓	✓	✓	✓
Multi-Currency Support <ul style="list-style-type: none"> Designate a system-wide base currency and manage multiple alternate currencies Lock currency rates if opportunities require Generate proposals reflecting native customer currency 	✓	✓	✓	✓	✓	✓	✓	✓
Configure sales processes without admin rights	✓	✓	✓	✓	✓	✓	✓	✓
Marketing								
Lead Management								
Import leads lists	✓		✓		✓	✓	✓	✓
Perform Lead de-duplication upon import								✓
Perform import actions to Leads								✓
Assign activities to Leads							✓	✓
Create Responses for Leads								✓
Automatic Lead distribution							✓	✓
Lead Qualification/Checklist			✓		✓	✓	✓	✓
Campaign Management/ROI and budget tracking			✓		✓	✓	✓	✓
E-mail Marketing	✓		✓		✓	✓	✓	✓
Segmentation and Groups			✓	✓	✓	✓	✓	✓
Group Actions for Leads List view								✓**

**Requires Sage SalesLogix v7.5.1

***Requires v7.5.2

Feature	v6.2		v7.0		v7.2		v7.5	
	Win	Web	Win	Web	Win	Web	Win	Web
Customer Service and Support								
Automatically assign tickets to appropriate resource	✓	✓	✓	✓	✓	✓	✓	✓
Track ticket ID, contact info, type, status, urgency, assignment, date needed	✓	✓	✓	✓	✓	✓	✓	✓
Create new service tickets from Account, Contact, and other locations	✓	✓	✓	✓	✓	✓	✓	✓
Schedule phone calls, meetings, or to-dos to follow up on open issues	✓	✓	✓	✓	✓	✓	✓	✓
Send e-mail with attachments and record correspondences and activity history	✓	✓	✓	✓	✓	✓	✓	✓
Submit issue descriptions and resolutions for archiving in the knowledge base	✓	✓	✓	✓	✓	✓	✓	✓
Create ticket groups, lookups, and reports	✓	✓	✓	✓	✓	✓	✓	✓
Track ownership and individual time spent on customer issues	✓	✓	✓	✓	✓	✓	✓	✓
Associate Asset to Ticket	✓	✓	✓	✓	✓	✓	✓	✓
Add "Parts" to Ticket			✓		✓		✓	✓
Ticket Activities = "Labor"			✓		✓		✓	✓
Associate Contract to Ticket			✓		✓		✓	✓
Service Contract Management	✓		✓		✓		✓	✓
Create, edit, and manage Returns	✓		✓		✓		✓	✓
Create, edit, and manage Defects	✓		✓		✓		✓	✓
Manage Assets (associated products) for Account, Ticket, and Ticket Activity Parts	✓		✓		✓		✓	✓
Punch in/punch out to track time spend on issues	✓	✓	✓	✓	✓	✓	✓	✓
SpeedSearch (locate resolutions to customer issues quickly)	✓	✓	✓	✓	✓	✓	✓	✓
Customer Self-Service Web Portal		✓		✓		✓		
Interactive Dashboards								
Drag tabs to middle section			✓		✓		✓	
Summarize data using different dimensions to get a different perspective and identify root causes more easily			✓		✓		✓	
Perform period-to-period comparisons for months, quarters, and years			✓		✓		✓	
Drill to analysis views (i.e. interactive reports) with filter ability from the dashboard			✓		✓		✓	
Usability Features			✓		✓		✓	
Usability								
Remote/Disconnected Client	✓		✓		✓		✓	✓
Share access to Groups (lists) between users easily and release changes	✓	✓	✓	✓	✓	✓	✓	✓
Copy key contact information to notepad automatically for use in an e-mail or document	✓	✓	✓	✓	✓	✓	✓	✓
Global date/time support for Activities & Calendaring <ul style="list-style-type: none"> Automatically convert all dates and times to users' local time Access a time-zone calculator when scheduling meetings with other regions 	✓	✓	✓	✓	✓	✓	✓	✓
Expanded copy/move Contacts			✓	✓	✓	✓	✓	✓
Associate attachments to Activities							✓	✓
Ability to have multiple middle panes								✓
Summary View of Lists								✓
Mashups capabilities and embedded timelines of events							✓*	✓
Welcome Page/Personal Workspaces						✓		✓
Unsaved Data Notification								✓***
Visual indicators for attachments in Activities and Calendars								✓***
Mass actions in Activities								✓***
Details Pane in Activities Workspace								✓***
Manage Tools drop-down menu	✓		✓		✓		✓	

*Requires New Web platform **Requires Sage SalesLogix v7.5.1 ***Requires Sage SalesLogix v7.5.2

Feature	v6.2		v7.0		v7.2		v7.5	
	Win	Web	Win	Web	Win	Web	Win	Web
Administrative								
Express Installation for faster one-server implementations	✓	✓	✓	✓	✓	✓	✓	✓
Copy and paste licenses as a group from an e-mail or text file	✓	✓	✓	✓	✓	✓	✓	✓
Import new users directly from Microsoft® Windows® (Active Directory not required)	✓	✓	✓	✓	✓	✓	✓	✓
Secure HTTPs sync option			✓	✓	✓	✓	✓	✓
One-click remote database install for Web							✓	✓
One-click remote database install for Windows			✓	✓	✓	✓	✓	✓
Customizable Integrity Checker			✓	✓	✓	✓	✓	✓
Process Orchestration <ul style="list-style-type: none"> • Create a process for any entity (not just Opportunities and Contacts) • Create single step or sophisticated multi-step/stage processes Field Level Security 							✓	✓
Field Level Security	✓		✓		✓		✓	✓**
Lotus Notes Compatibility	✓		✓		✓		✓**	✓**
Firefox Compatibility								✓**
Customization								
Create main views with full features of the standard views, including tabs and Groups, to extend Sage SalesLogix functionality beyond Accounts/Contacts/Opportunities/Tickets	✓	✓	✓	✓	✓	✓	✓	✓
Display non-modal forms or dialog boxes in a main view "container"	✓	✓	✓	✓	✓	✓	✓	✓
Configure Sales Processes stages, steps, and actions in Application Architect and bundle for release						✓	✓	✓
Utilize simplified setup and maintenance of Area/Category/Issue picklists			✓	✓	✓	✓	✓	✓
Customize Activities main detail view			✓	✓	✓	✓	✓	✓
Customize Report Manager			✓	✓	✓	✓	✓	✓
Add custom fields to base Sage SalesLogix tables			✓	✓	✓	✓	✓	✓
Enable non-Sage SalesLogix tables and views for use in Sage SalesLogix customizations			✓	✓	✓	✓	✓	✓
Sage SalesLogix Profiler utility			✓	✓	✓	✓	✓	✓
Sage SalesLogix Security API for custom security			✓	✓	✓	✓	✓	✓
.NET extensions for Windows Client			✓	✓	✓	✓	✓	✓
Standards-based architecture including ASP.NET, AJAX, and CAB for easy integration and expansion						✓		✓
Code editor for advanced customizations or leverage .NET tools					✓	✓	✓	✓
One-click deployment for Web and mobile customizations						✓		✓
Bundle and share customizations (Windows)	✓	✓	✓	✓	✓	✓	✓	✓
Bundle and share customizations (Web)					✓	✓	✓	✓
Ability to expose Sage SalesLogix entities to RESTful-based Web Services							✓*	✓
Charting, sparklines, and image controls							✓*	✓
Launch model entity wizards from Application Toolbar								✓
View which entities have been customized from the project tree view								✓
Dockable data sources view								✓
Access to form control settings from new code snippet action								✓
Portal Creation Wizard								✓
Lookup Control Setup Wizard								✓**
Panel Control								✓**
MultiTab Control								✓**
Mashup Data Source Control								✓**
Picklists in Properties								✓***
Enhanced Developer Experience (API Reference Guide, best practices document, new Developer Community)							✓***	✓***

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***Requires v7.5.2

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- Call 800-643-6400 to speak to a Sage representative, or
- Visit www.sagecrmsolutions.com

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.

