

Sage SalesLogix

## What's New in Mobile v2.0



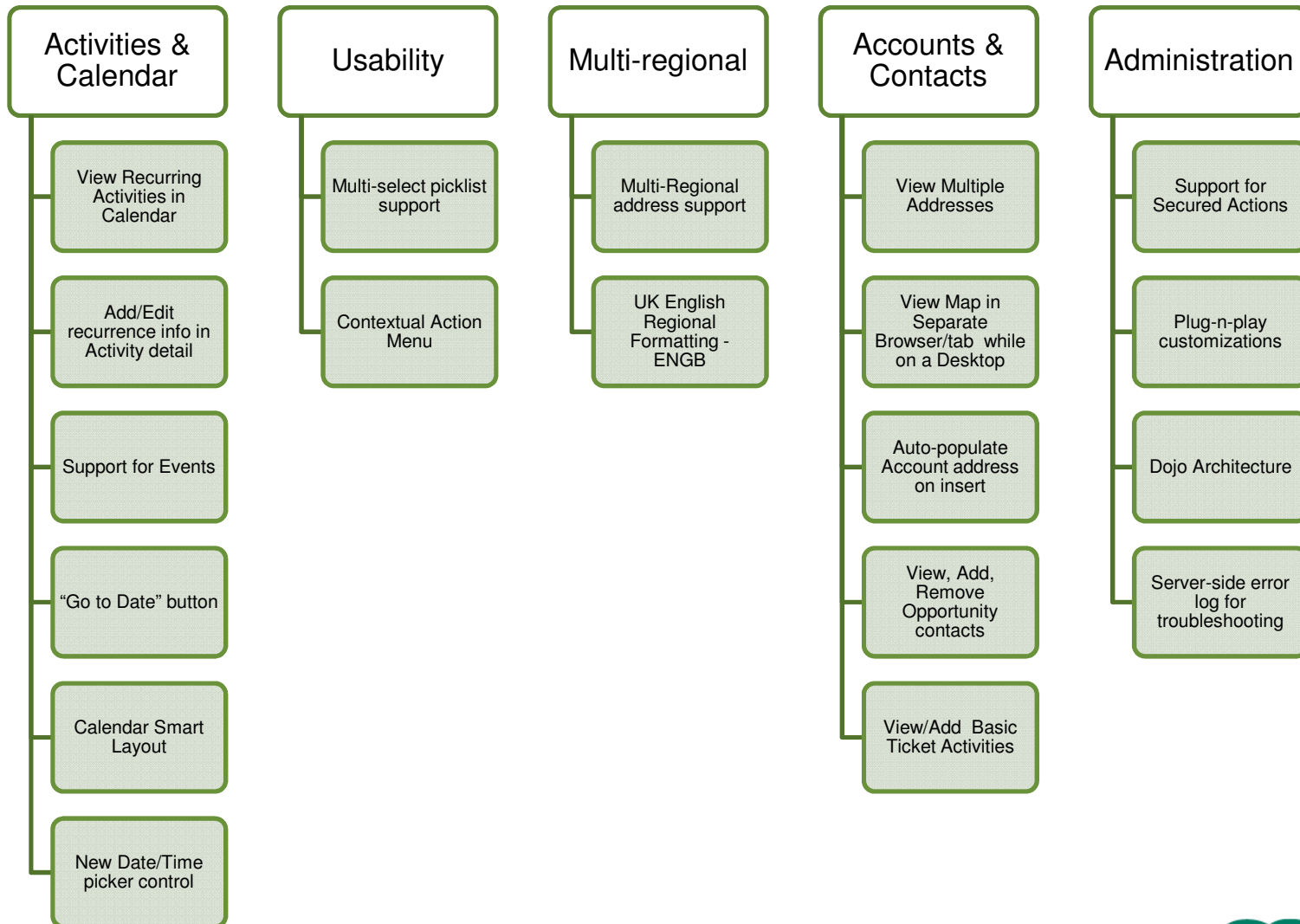
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# Mobile v2.0 - Overview

- Mobile v2.0 was developed and released alongside Sage SalesLogix v8.0.
- The release enhanced the Usability, Calendar, and Administration capabilities of SalesLogix Mobile.
- Most of the capabilities in this release are compatible with version 7.5.4 of SalesLogix.
- Competitive Differentiation – SalesLogix Mobile is the leading mobile CRM solution, continues to evolve, and provides ever expanding functionality to our Users.
  - The Quick Action Menu provides the User the ability to work in the mobile client and perform common tasks quickly.

# Mobile Feature Overview



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# Calendar - Support for Events and Recurring Activities

- Schedule Events such as:
  - Business Trips
  - Vacations
  - Conferences
  - Holidays
- Recurring Activities with options for frequency of occurrence

The screenshot displays two overlapping windows from the Sage SalesLogix application. The top window, titled 'Event', shows details for a 'Business Trip' event. The bottom window, titled 'To-Do', shows details for a task 'Send e-mail message'.

Event Details	
type	Business Trip
description	Meet Clients
start date	12/03/2012
end date	12/06/2012
Settings Help Top	
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To-Do Details	
regarding	Send e-mail message
location	
priority	Medium
category	Info Requested
start time	11/17/2012 9:15 AM
repeats	Monthly
recurring	Monthly on day 17 until 10/17/2013
timeless	<input type="checkbox"/> OFF
duration	0 minute(s)
alarm	<input type="checkbox"/> OFF
	0 minute(s)
auto rollover	<input type="checkbox"/> OFF

# Mobile – Enhanced Date Picker

Simpler user experience – quickly select date and time with a drop-down or increments.

The screenshot displays a mobile application window titled "Calendar". At the top, there is a red prohibition icon on the left and a green checkmark icon on the right. The main content area shows the day "Wednesday" centered above three date selection columns. Each column has a "+" button at the top, a dropdown menu in the middle (displaying "Nov", "09", and "2011" respectively), and a "-" button at the bottom. Below the date selection is the time "9:00 AM" centered above three time selection columns. The first two columns have "+" buttons at the top, dropdown menus in the middle (displaying "09" and "00" respectively), and "-" buttons at the bottom. The third column is a solid green vertical bar with the text "AM" at the top. At the bottom of the window, there is a navigation bar with icons and text for "Settings", "Help", "Top", and "Log Out". Below the navigation bar, the copyright notice "© 2011 Sage Software, Inc. All rights reserved." is visible.

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# Quick Action Menu



Quick Action Menu options displayed are relevant to the entity you are working with

Contacts

Search Search

**Abbott, John**  
Abbott Ltd.

Edit Call Main Call Mobile Account Email Add Note Add Activ...

**Adams, Georgia**  
Coca-Cola Amatil (NZ) Ltd

Opportunities

Search Search

**Abbott WorldWide-Phase I (Abbott Wor...**  
Open \$4,047,000.00 | 2-Qualification | Lee Hogan - Mid...

Edit Account Contacts Products Add Note Add Activ...

**Vegas Vision-Phase1 (Vegas Vision)**  
Open \$339,980.00 | 5-Negotiation | Ed Martinez - South...

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# Intelligent Displays

- Adjust to landscape view to optimize usability and what you can see – great for tablets

Calendar

Today Day Week Month

August 2012

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6 <sub>1</sub>	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23 <sub>1</sub>	24 <sub>1</sub>	25
26	27 <sub>4</sub>	28 <sub>7</sub>	29 <sub>7</sub>	30 <sub>7</sub>	31	

Mon Aug 27, 2012

Activities

- All-Day RE: Status of work at Abbott Lab  
Malvin, Lindsay / Advising Group
- 8:00AM Cold Call  
Scardino, David / Precision Company
- 10:00AM Demonstration  
Milligan, John / Clayco Manufacturing
- 2:00PM Presentation  
Rasmussen, Steve / Randall Chemical Group

Settings Help Top Log Out

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Calendar

Today Day Week Month

October 2012

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1 <sub>3</sub>	2 <sub>3</sub>	3 <sub>2</sub>	4 <sub>1</sub>	5 <sub>2</sub>	6
7	8	9	10 <sub>1</sub>	11 <sub>1</sub>	12	13
	15	16 <sub>1</sub>	17	18 <sub>1</sub>	19	20
	23	24	25	26	27	
	29 <sub>2</sub>	30	31			

Mon Oct 29, 2012

Activities

- All-Day Regular Contact  
Waite, Michael / Northern Services
- 11:05AM Follow-up  
Tattam, Sharyn / Equity Residential Management Corporation

Settings Help Top Log Out

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# Enhancements and Compatibility



Enhancement	v7.5.4	v8.0
Enter Activity Duration with auto complete using the Activity Duration editable pick list.	x	x
New Activity Location property added to Activities matches the Sage SalesLogix Web Client.	NA <sup>1</sup>	x
Activity User Options are used for defaults on alarm, duration, timeless, and auto-rollover settings.	x	x
Contextual Action Menu enables quick actions to be available in list views based on entity and availability of data.	x	x
Users can create an Activity for a Contact, Opportunity, or Ticket without first selecting an Account.	x	x
Users can configure the number of errors that are saved to local storage and can view them under Settings.	x	x
Account and Contact view-related items now contain addresses. Users can view all related addresses.	x	x
Add and remove Opportunity Contacts from an Opportunity using your mobile device.	x	x
Schedule and edit recurring Activities using your mobile device.	NA <sup>1</sup>	x



# Enhancements and Compatibility



Enhancement	v7.5.4	v8.0
Create/display/edit Ticket Activities as a related item for a Ticket.	x	x
The Address Quick Action opens Google Maps on a separate tab in the desktop browser.	x	x
Calendar Views provide improved usability by adjusting to landscape view.	x	x
The SDK now supports landscape orientation detection.	x	x
Improved ability to add customized toolbar items.	x	x
Sage SalesLogix Mobile uses the same role-based security as the Web Client.	x	x
Address templates can be applied to detail views based on region.	x	x
Customizations and upgrades are easier to deploy.	x	x
Application Level Default Values – support for default values in customizations at application level as well as entity level.	x	x
JavaScript has been converted to use the Dojo framework. If you will be merging customizations from an earlier version of Sage SalesLogix Mobile, you must convert customizations from the EXT framework to Dojo. For more information, refer to “Upgrading 1.2 to 2.0” at <a href="https://sage.github.com/argos">sage.github.com/argos</a> .	x	x





# Compatibility Notes

- <sup>1</sup>To be compatible with Sage SalesLogix v7.5.4, Mobile 2.0 recurring activity support and activity location are disabled. Recurring activities are visible but cannot be manipulated.

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