

Take control of your customers!

# CRMatic Lead Enhancer for SalesLogix

Wouldn't it be nice to create a new activity against a lead? Or view completed activities for a lead? Now you can with the CRMatic Lead Enhancer for SalesLogix!!!

## Features

- New Activities Tab
- New Notes/History Tab
- Add Notes against a lead record
- Schedule Phone Calls, Meetings, or To-Do's for a lead
- Sync Activities with Outlook Calendar
- Drag and drop emails from Outlook
- All Activity and Notes/History information is carried over when the lead is converted to a customer record



## Contact Us

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The screenshot shows the Sage SalesLogix interface for a lead named Joan Smith. The interface includes a sidebar with navigation options like Sales Dashboard, Accounts, Contacts, Leads, Opportunities, Activities, Calendar, Library, Reports, Invoices, Marketing, Service, and Support. The main window displays lead details such as Name, Title, Company, Address, Web, Industry, and SIC Code. A "Notes/History" tab is highlighted, showing a list of activities with columns for Type, Date/Time, Username, Contact Name, Result, and Description. A "Convert Qualified Lead" button is visible in the bottom right corner of the lead details section.

Type	Date/Time	Username	Contact Name	Result	Description
Note	4/29/2008 3:09:58 PM	Administrator	Smith, Joan		Questions
Note	4/29/2008 3:08:04 PM	Administrator	Smith, Joan		Technical notes
Phone Call	4/29/2008 3:07:53 PM	Administrator	Smith, Joan	Complete	Confirm literature received
Phone Call	4/29/2008 3:07:49 PM	Administrator	Smith, Joan	Complete	Follow up
To-Do	4/29/2008 3:07:38 PM	Administrator	Smith, Joan	Complete	Send literature
Phone Call	4/29/2008 3:07:32 PM	Administrator	Smith, Joan	Complete	Confirm meeting
Meeting	4/29/2008 3:07:23 PM	Administrator	Smith, Joan	Complete	Demonstration