

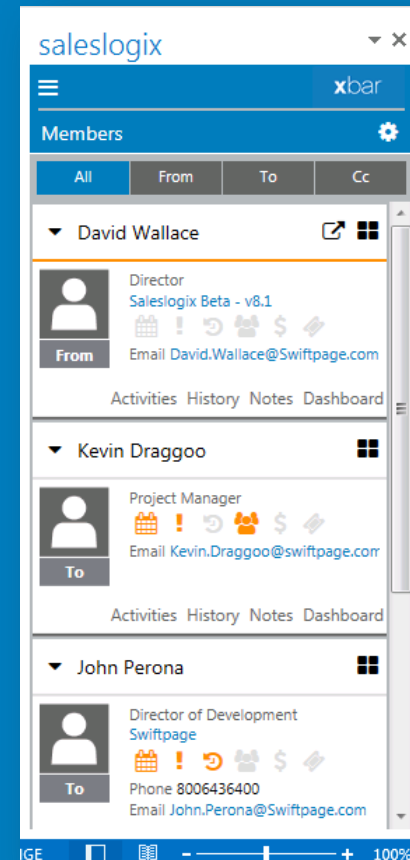


# Saleslogix Xbar – What's New

Presented by Jeff Hanrahan

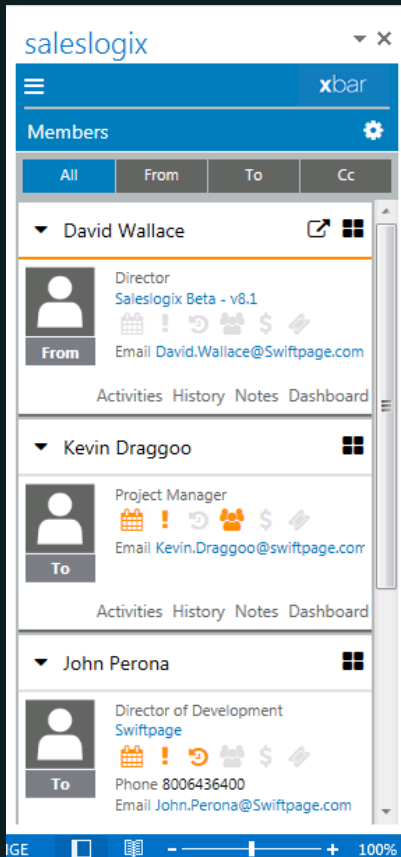
# Saleslogix Xbar Overview

- “Your CRM Inside” Strategy
- Purpose Built Application
- Developed on Sdata Framework
- Xbar Brings Work to Where User Wants to Work
- Compatibility with Saleslogix v8.0 and Up
- Operates with Outlook 2010 and 2013
  - 32-bit and 64-bit Versions of Outlook
- Free Add-on for Customers on *Current* Maintenance Plan

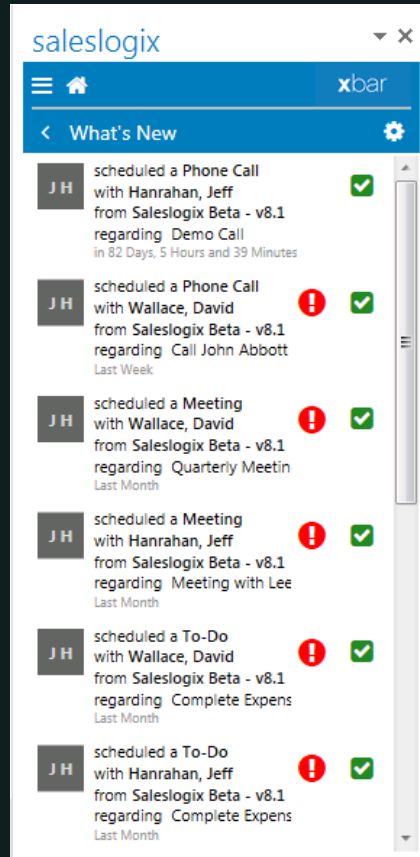


# Saleslogix Xbar Design/Development Stories

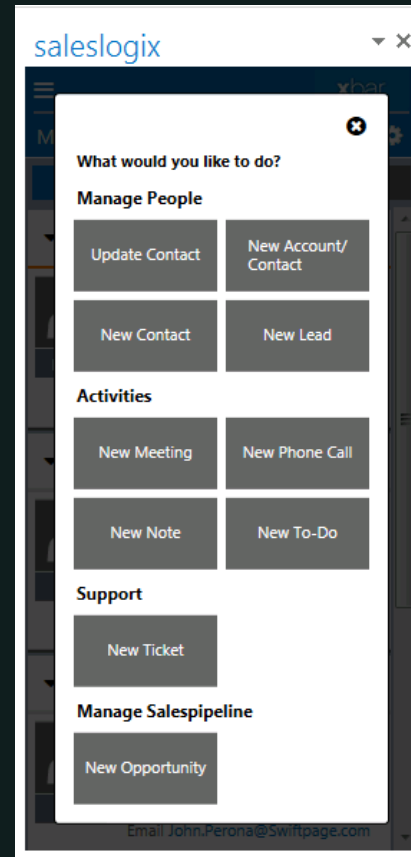
Remind Me Who You Are & Why I Care



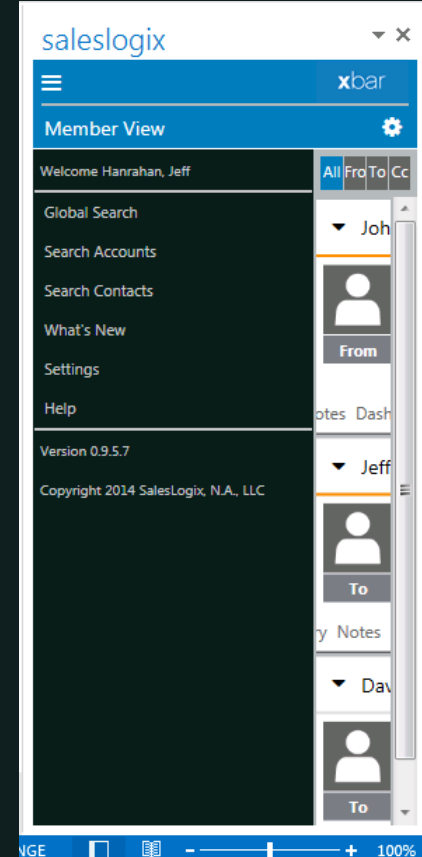
Insight Into the Greater Dialog



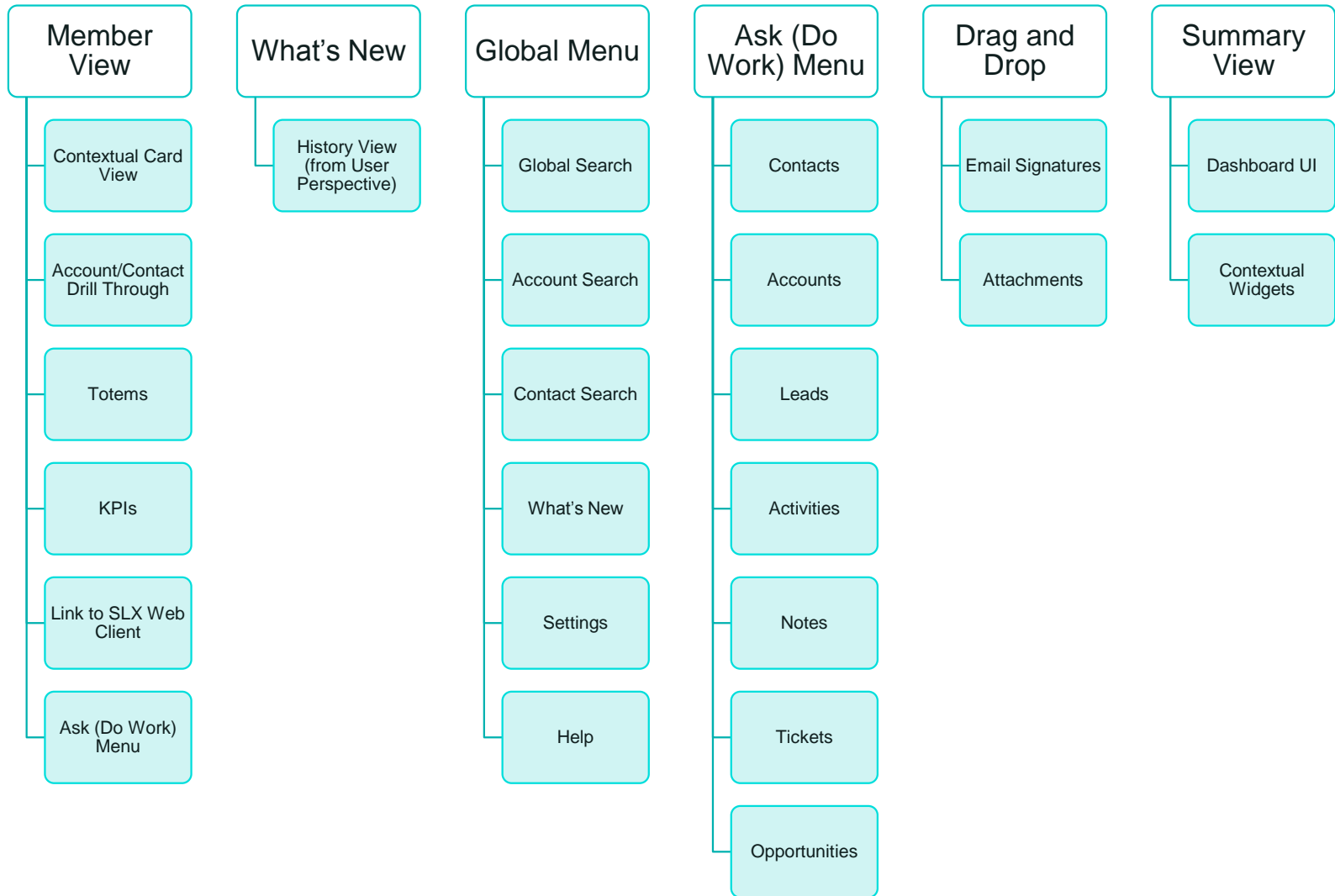
Do Work from Outlook



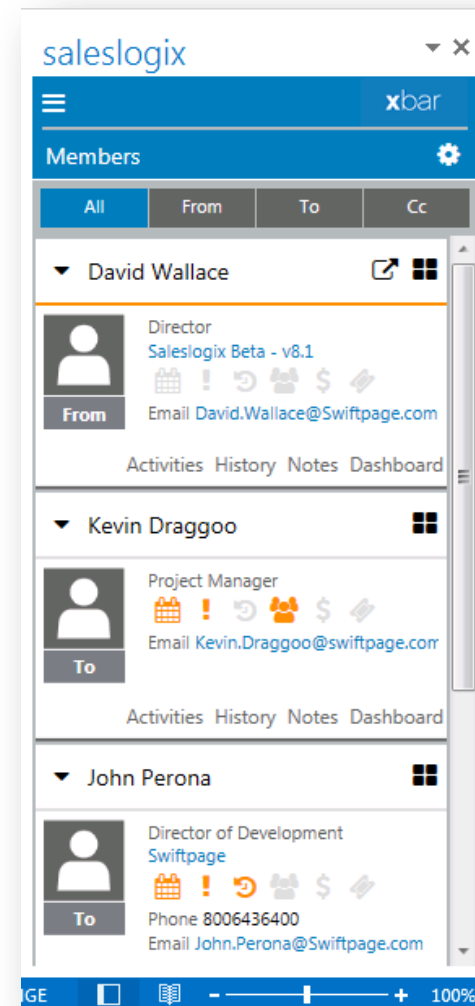
Find Your Information When & Where You Need It



# Xbar Feature Overview

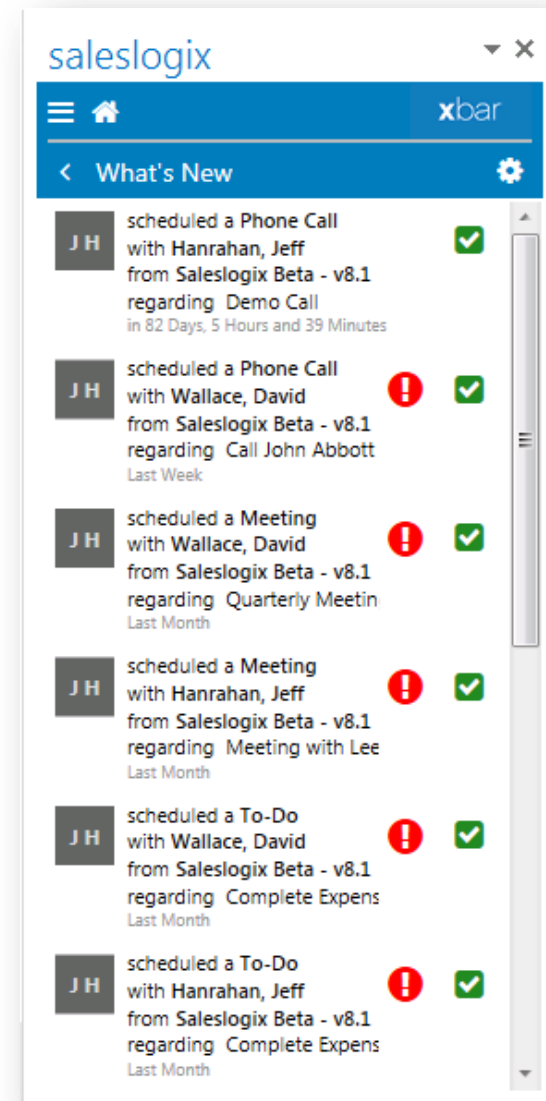


- Contextual Card Layout
  - Contextual Information
    - Name
    - Associated Account
    - Phone Number
    - Email
  - Totems
    - Pending Activities
    - Past Dues
    - History
    - Duplicate Contact, Lead, or User Profiles
    - Open Opportunities
    - Open Tickets
  - Tabs
    - Activities
    - History
    - Notes
    - Dashboard
      - KPIs
- Link to SLX Web Client
- Ask (Do Work) Menu
- Corresponds to the Xbar Story of Remind Me Who You Are and Why I Care
  - Provides Context to Help User Problem Solve
  - Gives ability to Improve Efficiency and Take Action Fast

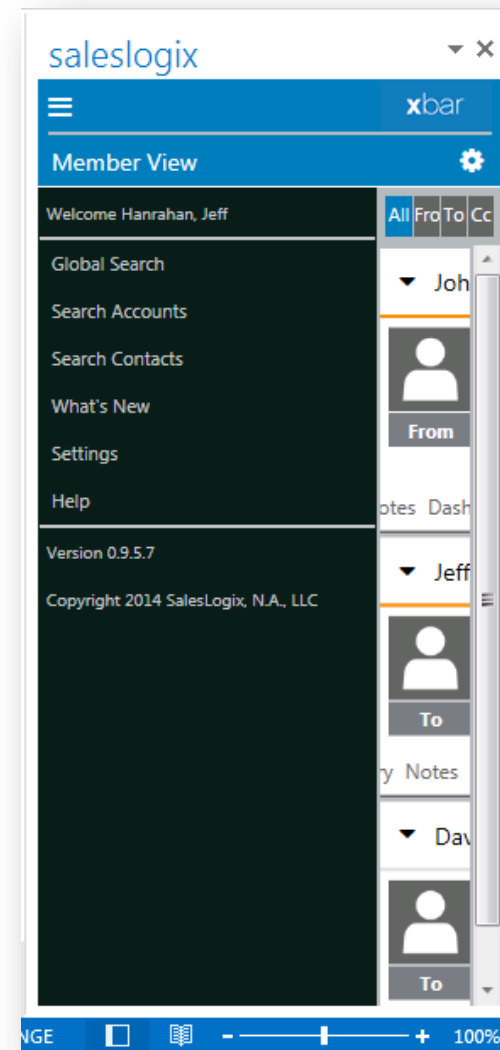


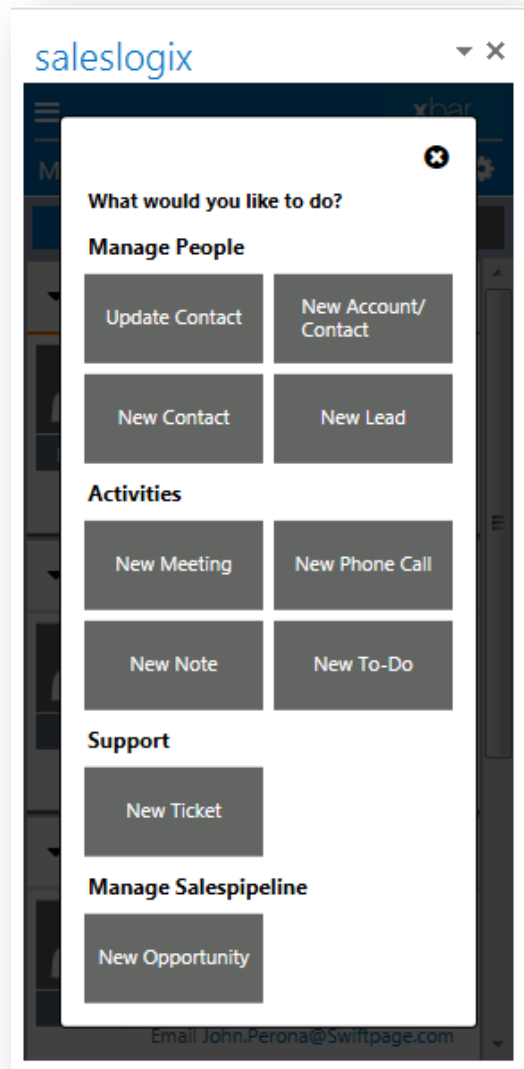
# What's New (View)

- Review Past Items Based On User Perspective
  - Notes
  - History
  - Activities
- Similar to Mobile UI
  - String of Text to Give You Summary
- Social Thread Feel
- Icons
  - Past Due – Exclamation Point
  - Check – Complete Activity



- Similar to Mobile Client UI
- Global Search
  - Contact, Lead, and Account Centric
- Contact-Level Search
- Account-Level Search
- What's New Accessibility
- Settings
  - Configure URLs
  - Configure Login Credentials
- Help
  - Quick Tips



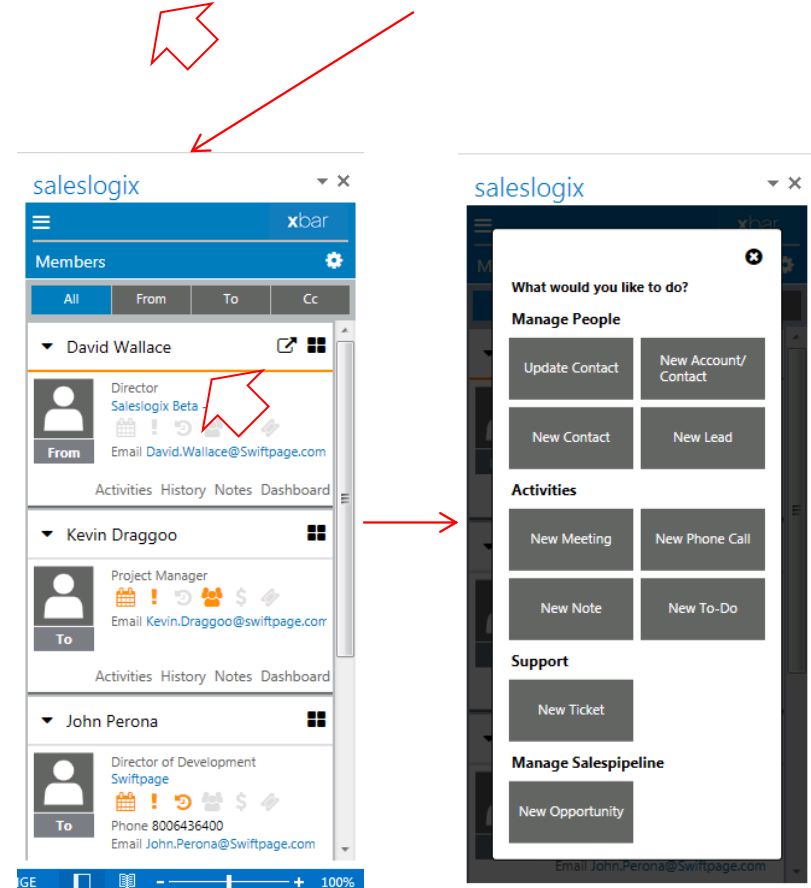


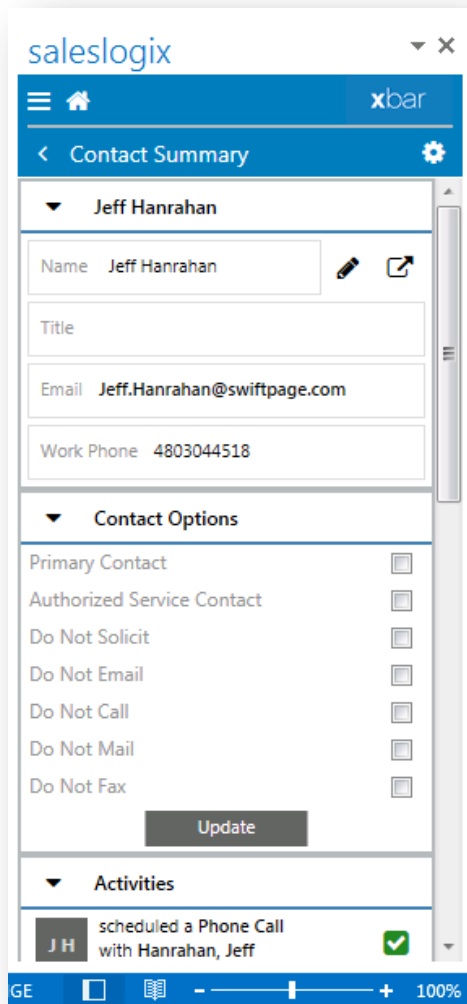
- Do Work With:
  - Contacts
  - Accounts
  - Leads
  - Activities
  - Notes
  - Tickets
  - Opportunities
- Create/Modify



- Email Signatures
- Drag and Drop to Detail/Edit Views
- Attachments
  - From Email to Xbar
  - From Desktop to Xbar
- Drag and Drop to Create/Modify
  - Contact
  - Account
  - Lead
  - Ticket
  - Opportunity

Jeff Hanrahan  
Product Manager, Saleslogix Product Management  
w: (480) 304-4518 | m: 602-738-2755  
[Jeff.Hanrahan@swiftpage.com](mailto:Jeff.Hanrahan@swiftpage.com) | [www.swiftpage.com](http://www.swiftpage.com)





- Dashboard UI
- Summary Views
  - Contact Perspective
  - Account Perspective
  - Lead Perspective
  - User Perspective
- Widget
  - Contextual Information
  - Insight into Different Entities
    - Activities
    - Tickets
    - Opportunities
    - Attachments

- Compatibility Criteria
  - Saleslogix v8.0 and up
  - Windows 7 and 8
  - Outlook 2010 and 2013
    - 32-bit and 64-bit Outlook Versions
  - Must Be on a *Current* Maintenance Plan



- Thank you
- Contact Dick Wooden  
[Dick@successwithcrm.com](mailto:Dick@successwithcrm.com)  
269-445-3001  
Success with CRM Consulting, Inc.  
[www.SuccesswithCRM.com](http://www.SuccesswithCRM.com)