

# Administrative Considerations for SalesLogix End Users



*Sage University – Sage SalesLogix*

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The Sage SalesLogix Network Client is a powerful tool because your company can add its own customizations to better support your unique business rules and processes.

With a Sage SalesLogix Client implementation at your office, there's always a companion installation of the SalesLogix Administrator application. This Administrator application runs as its own program, and it controls the interface—and even the data—that you see when you log on to the SalesLogix Client.

As you might expect, the actual person responsible for managing this SalesLogix Administrator application is referred to as your SalesLogix administrator. (Creative name, right?) The administrator's most common tasks are setting up licenses, creating users and teams, and installing customization bundles/service packs. (Heavy-duty customizations, by the way, are created in a separate application called the SalesLogix Architect.)

As you work through the End User curriculum or consult the SalesLogix Help Files, you may see lots of references to your administrator. With so many options for configuration, it's easy to get lost in the footnotes. This document provides a list of specific features controlled by your administrator that you might find useful in a discussion with your administrator during the early phases of your SalesLogix implementation.

## **Note:**

As a user, you can configure some of your own options without having to rely on your Administrator; in fact, some settings are available in both the Client and Administrator applications. In the following table, if you see a \* denoted next to an option, it indicates a setting that is available to both users and administrators. To find those settings in the Client, click the **Tools > Options** and **Tools > Client Options** menu options.

Area/Feature	Considerations
<b>User Settings</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> *What view do you want to show first when you log on? The default is Dashboards.</li> <li><input type="checkbox"/> For each Main view, what groups or tabs do you want to see? Do you want any of those default groups removed? Do you want the default order of any of those groups changed?</li> <li><input type="checkbox"/> Do you want to be notified automatically via e-mail if another SalesLogix user assigns you to a ticket or defect? The default is set to no.</li> <li><input type="checkbox"/> Do you need to be assigned a specific Administrative Role—like adding items to the library or being able to add new users when your administrator is away? (You'll need the SalesLogix Administrator application installed on your machine or access to the machine on which it's installed.)</li> <li><input type="checkbox"/> Do you want to prevent certain users from being able to view your calendar? Do you want to be able to access a certain user's calendar that you can't currently view?</li> <li><input type="checkbox"/> Do you want to be able to add personal contacts to the SalesLogix database, and designate them as such? For example, do you want to be able to add your dentist in the database so you can schedule personal appointments with him? (By default, personal contacts are turned off in SalesLogix.)</li> <li><input type="checkbox"/> *Do you want to be warned every time you are about to open a potentially large group. The default is set to Yes.</li> <li><input type="checkbox"/> Do you want to enable Advanced Outlook Integration so you can see peoples' calendar availability from Outlook instead of from the SalesLogix calendar?</li> <li><input type="checkbox"/> *Do you want to change the default colors that are denoted for the different events on the SalesLogix Calendar?</li> <li><input type="checkbox"/> Are you a Remote user—meaning that you will need to access SalesLogix data remotely on your own laptop even when you can't connect to your network at the office? (If so, see Remote User Settings.)</li> </ul>
<b>Remote User Settings</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Which accounts do you need to subscribe to remotely? You'll want to minimize the number of accounts so that you can sync faster so you do not have to sync your entire database if you don't need all those accounts when you're remote.</li> <li><input type="checkbox"/> How do you plan to sync—FTP, Network, HTTP?</li> <li><input type="checkbox"/> If there is a conflict during synchronization, should the Remote Client win, or the user who owns the record, or the user who made the most recent change?</li> </ul>
<b>User and Team Security</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Will you assign accounts to different teams? Are there certain teams that should not have access to certain accounts?</li> <li><input type="checkbox"/> Do you need to be designated as a manager of another user so you can see that user's accounts?</li> </ul>

<p><b>Menus and Nav Bars</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Are there any menu items or Nav Bar items that you won't use? Does it make sense for your company to have your administrator just hide them from the Client so you don't have to see them in your interface.</li> <li><input type="checkbox"/> Are there certain menu items that certain users should not access? For example, do you want everyone to be able to access the Tools &gt; Options menu?</li> </ul>
<p><b>Access to the Tools &gt; Manage Menu</b></p>	<p>By default, all users can access the Tools &gt; Manage menu. These options contain a lot of settings that users can control for how your company interacts with certain data. Changes made to any of these settings by one user affect all other users.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>*Pick Lists:</b> Add a new pick list for use on a form. After adding a new pick list, your administrator or developer would need to assign that pick list to a particular form in order for you to use it.</li> <li><input type="checkbox"/> <b>Lookups:</b> Add your own lookups that you can use in a predefined lookup. This feature is useful for any custom screens you might have because most other lookups area already defined by default.</li> <li><input type="checkbox"/> <b>Literature:</b> Manage the available literature your company has that can send out via literature requests.</li> <li><input type="checkbox"/> <b>Resources:</b> If you're not using Advanced Outlook Integration, manage the available resources you can use when scheduling an activity (i.e. Conference Rooms).</li> <li><input type="checkbox"/> <b>Qualifications:</b> Manage the criteria you use to qualify a lead.</li> <li><input type="checkbox"/> <b>Marketing Services:</b> If your company partners with a third-party e-mail marketing services provider, configure the integrations settings here.</li> <li><input type="checkbox"/> <b>Products:</b> Manage the available products your company sells, which appear as part of opportunities and assets.</li> <li><input type="checkbox"/> <b>Opportunity Defaults:</b> Manage the default settings for new opportunities.</li> <li><input type="checkbox"/> <b>Competitors:</b> Mange the available competitors you might want to document as part of an opportunity.</li> <li><input type="checkbox"/> <b>Quotas:</b> Manage quotas for various SalesLogix users. (Used for dashboards.)</li> <li><input type="checkbox"/> <b>Sales Processes:</b> Design your own sales processes.</li> <li><input type="checkbox"/> <b>Customer Service Defaults:</b> Manage the settings used for a new ticket.</li> <li><input type="checkbox"/> <b>Customer Service Options:</b> Manage auto-assignments, user defaults, area/category/issues, ticket rates, and defect rates.</li> <li><input type="checkbox"/> <b>Lead Sources:</b> Manage the list of sources you can use for new leads.</li> <li><input type="checkbox"/> <b>Standard Problems/Resolutions:</b> Manage the list of standard problems/resolutions used for tickets. (These are one of many indexes SpeedSearch uses to find an answer to your search.)</li> <li><input type="checkbox"/> <b>Dashboard Options:</b> Set the fiscal period for your dashboards.</li> </ul>

**Contact Processes**

- Do you want to create custom contact processes? What tasks do you want to include in those? In order to create a contact process, your company needs to install the SalesLogix Architect. This application is quite robust and sophisticated because it allows you to customize the entire SalesLogix interface. In other words, it may require some training. Luckily, contact processes are probably the most intuitive plugin with which to work. At a minimum, your administrator should take on this task.

The available tasks to add to a custom contact process include the following: Activity (meeting, phone call, to-do, note), Output (document, e-mail, fax, lit. request), Decision (question, dialog, ESP, stop), or Plugin (database change, data view, sub-process, report, script).