

What time does class start?

Find the schedule for your course in your confirmation e-mail or from the Course Details link in your My University profile. Start time on Day 1 is listed in Pacific Standard Time (PST) in your e-mail confirmation.

I'm up, I'm up! Now what do I do first?

On the morning of class, grab your coffee ("sip, ahhh"), and get comfortable at your computer. Log on to your Sage University profile to launch the Anytime Learning course window. Also launch a separate browser window for your Virtual Lab session. Open your book, and connect to the orientation conference call.

How do I connect to the call?

Find the number to dial into the conference call using the phone number listed in your e-mail. If you have trouble connecting to the call, contact our training coordinators at training.crm@sage.com or 888-765-6662.

What are we going to talk about on the call?

We want to introduce ourselves to you! Although most of the instruction is pre-recorded, our trainers stand-by to work you through the material for the duration of the course. If you have questions about the video/exercise format, this first morning call is a good chance to get acquainted. We can also address house-keeping items and technical difficulties.

Who else is on the call?

It depends. We run all of our Virtual Classroom courses simultaneously. Your workbook is adjusted for the class for which you registered, and it may differ from someone else on the call who registered for a different class. We meet for wrap-ups with each group at different times, so the discussion and curriculum will still be relevant to you.



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Welcome to Virtual Classroom!

We are glad you are here! Virtual Classroom is not a place; it's an experience. Talk with your trainer through Web chat or teleconference, watch recorded videos to see a demo and learn processes, and use the Virtual Lab to practice each exercise on your own. Watch the orientation video to see how this works: tinyurl.com/slxhol.

Checklist:

On the morning of class, you should have the following resources:

- An invitation to the Virtual Lab session sent to your email address from training.crm@sage.com. This invitation contains a link to join the Virtual Lab and teleconference information.
- A registration confirmation for the companion Anytime Learning course sent to your email address from training.crm@sage.com.
- A link to view your course workbook. Each exercise in your book has a 1:1 correspondence to a recorded video in your Anytime Learning course window. If you prefer to receive a printed, bound, click the link in your confirmation email to place an order.

Agenda



Because the format of this class is self-paced, note the recommended agenda for best use of your time.

Day 1 – Lessons 1-5

- The SalesLogix Environment
- The SalesLogix Administrator
- The SalesLogix Client
- SpeedSearch
- Web Client Deployment

Day 2 – Lessons 6-10

- Users and Security
- Teams and Security
- SalesLogix Client Components
- SalesLogix Integration with Microsoft Outlook
- Synchronization

Day 3 – Lessons 11-14

- The Remote Client and Disconnected Web Client
- User and Data Maintenance
- Contact Processes
- Sales Processes



Consider the Following:

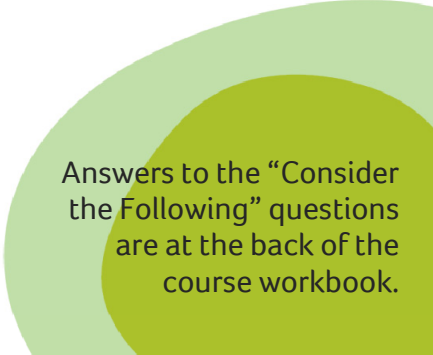
In a technical training class, it's easy to get lost in the details. Our goal is to make sure you not only understand the details of how something works, but also WHY you need to know them. The "Consider the Following" questions are a good way to keep your mind focused on the bigger picture as you work.

Take a look at these questions now, and refer back to them as you work. When we reconvene as a group, we will tackle some of these questions in our discussion.

- 1: (No questions.)
- 2.1: When you log on to the Administrator, you need to use a data link. What is the data link "linked" to? How do you know the right settings to use for a data link?
- 2.2: Consider the purpose of each license. Does the training environment have all the licenses you expect? Does it have more than you are used to seeing?
- 2.3: In the training environment, we set our logging paths to use C:\. In a production environment, we should enter a UNC path: "\\srvXX\". Why is that path formatting important? If you are working on the Sync Server, why can't we just always use "C:\?"
- 2.4: There is a setting to warn users when they switch between large groups in the Client List view. What makes up a "large group," and why might you want to disable this warning for your users?
- 2.5: Can you add files to the library using Windows Explorer? What is the reason for using the Administrator interface for adding library files?
- 3.1: Can you install the Remote Client instead of the Network Client? Why might you do this?
- 3.2: Can you include bundles or service packs in an auto-install of the Client?
- 3.3: What is important about the data link used to log on to the SalesLogix Client?

Continued...

- 4.1: In the Manage SpeedSearch Configuration window, imagine the Run Now button is disabled. What might be the cause?
- 4.2: What kinds of folders might you add to an external index?
- 4.3-4.4: Why is it important to run at least one incremental build of an index each day?
- 5.1: What happens under the hood when you deploy the core portals?
- 5.2: When configuring IIS performance, which of the tasks are SalesLogix-specific, and which tasks might apply to any Web site implementation?
- 6.1-6.4: Why would you consider creating a template user vs. creating a user based on another existing user?
- 6.5: What is the main reason to use feature security? What are some common settings?
- 6.6: What is function security used for? Do you set this on a per-user basis?
- 6.7: What is the main difference between a Web viewer user and a regular Web user?
- 7.1: Can teams contain departments? Can a department be a member of more than one team?
- 7.2-7.3: If a user is on a team as part of a department, can you edit the user's team settings?
- 8.1: What does the base currency mean? Once you set the base currency, can you change it later?
- 8.2: How would a sales person use multi-currency?
- 9.1-9.7: What is special about the SyncSalesLogix category?
- 10.1-10.4: What options are available for conflict resolution?
- 10.5-10.6: What sync transfer profiles are available?
- 11.1-11.3: How can you deliver the Remote database to a Remote user?
- 11.4-11.6: What visual clues can you use to tell if a user is logged on to the Client using a Remote data link vs. a network data link? How can you tell which data link the user is using?
- 11.7-11.8: As an administrator, why might you find a Remote task useful?
- 11.9: Does the machine running the Disconnected Web Client (a salesperson's laptop) require IIS?
- 12.1: If you retire a user, is the user's information deleted from the database? What about when you delete a user? How can you leave user information in the database and not consume a SalesLogix license?
- 12.2: What are the three admin roles you can assign?
- 12.3-12.4: How can you test a SQL statement inside the Administrator to see how many rows in the SalesLogix database will be affected? Discuss a situation you might use this feature for?
- 12.5-12.6: Does the Integrity Checker allow you to see the SQL statements that are actually run against the database? Why might this feature be useful?
- 12.7: What documentation resource should you use when installing a service pack?
- 13.1-13.4: How do contact processes differ from sales processes?
- 14.1-14.2: Can SalesLogix users design their own sales processes?



Answers to the “Consider the Following” questions are at the back of the course workbook.