

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.



8800 N Gainey Center Drive
Suite #359
Scottsdale, AZ 85258
training.crm@sage.com
888-765-6662

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 – Lesson 1 and Part of Lesson 2

- Project Scenario
- Create a New Architect Project and Explore the Sage SalesLogix Client Interface
- Insert Projects
- View All Projects
- Associate an Account to a Project and View all Projects for a Selected Account

Day 2 – Lesson 2

- Associate Multiple Contacts to a Project and View all Projects for a Selected Contact
- Associate a Project to a Ticket and View all Tickets for a Selected Project
- Prevent a User from Closing a Project that has Open Tickets
- Bundle the Project

Day 3 – Lesson 3

- Project Workshop



Consider the Following:

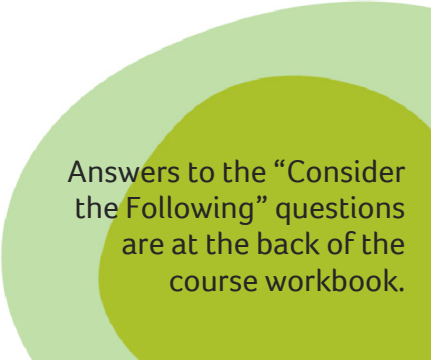
In a technical training class, it's easy to get lost in the details. Our goal is to make sure you not only understand the details of how something works, but also WHY you need to know them. The "Consider the Following" questions are a good way to keep your mind focused on the bigger picture as you work.

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. What is the difference between a data link and a data connection?
2. What is the difference between a Manage form and a Data form?
3. How is the LookupID in a lookup control mapped to the actual lookup?
4. When adding a new menu option to an existing menu, what best practice ensures your menu items don't get overridden in an upgrade?
5. What happens to a data grid when you change its Read-Only and Disable Editor properties to True?
6. If you change a column type to HyperLink, into what event does this give you the ability to hook?
7. What is the Application object?
8. How could you use the Application object to display the business description when the Account Detail view opens? How can you refresh the underlying form control value on save?
9. How is the ADO Command object used with the parameter object?
10. When you create a CONST to store your SQL, can you later change the CONST in code?
8. VBScript has limited error handling. What is the best approach to take when handling errors?

Continued...

7. What steps would you take to set up the Architect for debugging?
12. We use the method InvokeMainview from the SLX_Common script instead of Application.MainView.add. Is there a Method from this script that we can use with a data grid, or can you write your own?
14. After you create a new bundle (sxb file), how do you apply this bundle to another SalesLogix database?



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