

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: www.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 e-mail 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 e-mail address from training.crm@sage.com.
- Your course workbook. We ship this book to you before class. Each exercise in your book has a 1:1 correspondence to a recorded video in your Anytime Learning course window.

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
- Configure the SlxClient Deployment
- Insert Projects
- View All Projects
- Associate an Account to a Project and View all Projects for a Selected Account
- Associate Multiple Contacts to a Project and View all Projects for a Selected Contact

Day 2 – Lessons 2 and 3

- 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
- Configure the SlxCustomerPortal Deployment
- Allow Contacts to Add a New Ticket to a Project

Day 3 – Lesson 4

- 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.

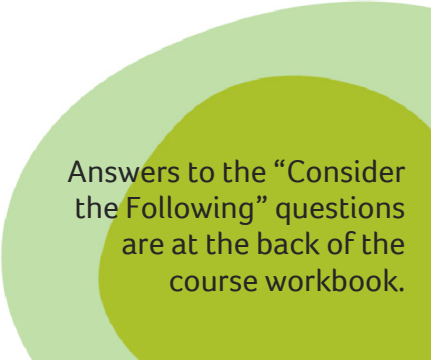
Take a look at these questions now, and refer back to them as you work. When we reconvene as a group, we will tackle some of these questions in our discussion.

1. What is the difference between a data link and a data connection?
2. What situations would you want to export a project workspace? What is the main difference between an exported project workspace (a model) and the Virtual File System (VFS)?
3. What happens when you do a project backup?
4. With deployments, what is the difference between clicking the Run button and deploying manually (Build Web Platform, Deploy, Open Portal)? Why would you use one over the other?
5. Other than the letter "p," how is an .aspx file different from an .ascx file?
6. What happens during a build process? What happens during a deploy process?
7. When you create a new entity, what two methods are already built for you?
8. When you create a new page you have 3 options: Portal Page, MainView, and Entity Page. What is the difference? If you create a page as one type, can you later change it to another? If so, how?
9. When changing code for a portal through Visual Studio, why do you have to bring those changes back into the Application Architect?



Continued...

10. What are some differences between the Code Snippet Action Item and the C# Snippet Action Item?
11. When you create an external assembly that will be tied to a business rule, what gives you access to the entity?
12. What does the Sage.Platform.ChangeManagement namespace allow us to do?
13. After you create a bundle in the Application Architect, how would you apply the bundle? Can you apply a Web bundle using the SalesLogix Administrator?



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