Welcome to Administering Sage SalesLogix!

Agenda

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

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. We will tackle some of these questions in our discussions.

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?

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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?

8.1-8.3: (No questions.)

8.4: What does the base currency mean? Once you set the base currency, can you change it later?

8.5: How would a sales person use multi-currency?

8.6-8.8: (No questions.)

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?

15.1: When adding a new menu option to an existing menu, what best practice ensures your menu items don't get overridden in an upgrade?

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