Sage CRM SalesLogix Planning Guide

Version 7.0

Developed by Sage CRM SalesLogix Technical Publications

sage software

Your business in mind.

Sage CRM SalesLogix Planning Guide

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Technical Support
Technical Support is available to customers with support contracts directly from Sage Software and to Certified Business Partners. Calls are answered during business hours, Monday through Friday, excluding holidays. Current contact information is available on the SalesLogix Web site. Customers with a valid technical support contract and a Web access code can request technical support electronically on the SalesLogix SupportOnline/Sage Software Online Support and Services Web site.

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Revisions to this book are posted on the SalesLogix SupportOnline/Sage Software Online Support and Services Web site. Check this site regularly for current SalesLogix product documentation.

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Introduction

Sage CRM SalesLogix is the leading customer relationship management solution that enables small to medium-sized businesses to acquire, retain, and develop profitable customer relationships through integrated Sales, Marketing, and Customer Service.

About This Guide

This guide helps you to plan for a successful implementation. It provides valuable insight and key technical information not available in any other SalesLogix documentation.

The *Sage CRM SalesLogix Planning Guide* helps you:

- Develop an installation strategy, identify the implementation team, and determine the role of each member.
- Understand the product components and identify the pieces necessary for Network, Remote, and Web installations.
- Make informed decisions about selecting a relational database management system (RDBMS).
- Select the hardware necessary to deploy SalesLogix products within your company.
- Choose a synchronization method and Synchronization Server hardware (if applicable).
- Prepare your network for SalesLogix.
- Plan for customizations and for importing data from other systems.

Although you may not install or use all of the SalesLogix components and functionality available to you, it is recommended that you familiarize yourself with each element of a SalesLogix implementation as described in this guide. This way, when you are ready to plan your implementation, you will thoroughly understand your system requirements. The checklist, in Appendix C, is available to help you formulate your implementation plan.

What You Need to Know

The *Sage CRM SalesLogix Planning Guide* assumes you have a working knowledge of Microsoft Windows operating systems and experience with relational database management systems. You should also understand the concepts of a client/server computing environment, in particular, strategies for network and off-site users.

Installing and configuring the SalesLogix Web components requires detailed knowledge of the SalesLogix system, Windows security, Microsoft Internet Information Server, and Web technology.

Related Documentation

In addition to the *Sage CRM SalesLogix Planning Guide*, SalesLogix offers the following electronic documentation. (All documents listed are available on Sage CRM SalesLogix SupportOnline/Sage Software Online Support and Services web site at http://support.saleslogix.com. The *Sage CRM SalesLogix Implementation Guide* is also available in print.)

- The *Compatibility Checklist* outlines the hardware and software currently supported for a SalesLogix implementation.

- The *Sage CRM SalesLogix Implementation Guide* provides step-by-step instructions for installing SalesLogix. The *Sage CRM SalesLogix Implementation Guide* is available on the Sage CRM SalesLogix version 7.0 DVD and is installed with the Administrative Tools and Servers.

- *Getting Started with Sage CRM SalesLogix* provides step-by-step instructions on how to manage your customer accounts, contacts, opportunities, tickets, defects, activities, and related information. *Getting Started with Sage CRM SalesLogix* is available on the Sage CRM SalesLogix version 7.0 DVD and is installed with Sage CRM SalesLogix.

- The *Sage CRM SalesLogix LAN Developers Reference* provides VBScript, COM, and SQL functions you can use to customize SalesLogix to meet your specific needs.

- The *Sage CRM SalesLogix Web Implementation Guide* provides detailed instructions for installing and configuring the SalesLogix Web Client and other SalesLogix Web interfaces, such as Customer Portal and LeadCapture. The *Sage CRM SalesLogix Web Implementation Guide* is available on the Sage CRM SalesLogix version 7.0 DVD.

- The *Sage CRM SalesLogix Web Developers Reference Guide* provides information about functions you can use to customize the SalesLogix Web components to meet your specific needs.

- The *Sage CRM SalesLogix Database* online Help documents all the tables and fields in the SalesLogix base product as well as any optional bundles. Use this help file when you are adding custom tables and fields to the standard SalesLogix database, or to build database queries.

Additional resources and documentation are available on the Sage CRM SalesLogix SupportOnline/Sage Software Online Support and Services Web site at http://support.saleslogix.com, and Help is available in each SalesLogix application.

The Help symbol precedes online Help topic names, where you can find additional information about features or procedures not detailed in this guide.

Chapter 1
Planning Your Implementation

Planning is essential for a successful SalesLogix implementation. A well thought-out plan defines the business goals you want to achieve, helps you identify system requirements, and helps you ask the right questions and make knowledgeable decisions before the actual implementation. You can avoid many problems by developing a plan well in advance of your implementation.

Defining the Implementation Plan

The tasks to successfully implement SalesLogix may differ slightly from one installation to the next. The following are common to all installations:

- Determine project requirements.
- Determine the necessary SalesLogix components.
- Determine who will perform the implementation and select an implementation team.
- Set an implementation schedule.
- Prepare your network for SalesLogix.
- Develop a prototype.
- Order and install hardware.
- Decide which data will be imported into SalesLogix and how importing will be accomplished (if applicable).
- Train administrators and users.

This guide helps you develop an implementation plan and schedule necessary tasks.

Determining Project Requirements

First, define the business goals you want to achieve and how you will use SalesLogix to achieve them.

- Describe your company's objectives and desired outcome.
- Identify the SalesLogix components needed to build the system that meets your company's needs.
- Identify the impact SalesLogix will have on your company, both for users and support personnel.

If SalesLogix will be installed at multiple sites, we strongly recommend choosing one location as the pilot site in which to test the implementation. A pilot site lets you install and test the system in a live environment with a controlled number of users. Lessons learned at the pilot site will be beneficial for all subsequent installations.

Determining the Components of Your Implementation

This guide explains the components that comprise a SalesLogix installation and how each can benefit your company. As you read this guide, consider:

- The SalesLogix components and how they relate to the system as a whole.
- The relational database management system (RDBMS) that best fits your company and data capacity.

- The hardware for each component and how to configure it for maximum performance.
- The most appropriate methods for synchronizing data between the main office and remote locations (if applicable).

Identifying Your Internal Implementation Team

Leading an implementation requires organizational skills, technical experience, and an understanding of SalesLogix components. As early as possible in the planning process, determine who in your company will assist with the implementation process and rollout.

Installing and configuring SalesLogix requires detailed knowledge of Windows security. Your system administrator must participate in the installation and customization.

Installing and configuring the SalesLogix Web components requires Microsoft Internet Information Server and Web technology. An individual familiar with Web technology, such as a Webmaster, should also participate in the installation and customization.

Your implementation team should include individuals who will be responsible for the SalesLogix project. Assign these team members well-defined roles and responsibilities before starting the project and ensure they understand the time commitment involved. It is important to assign adequate full-time resources to the SalesLogix implementation project. It is also important to develop a communication plan to keep each team member informed of the project status and other related issues throughout the installation.

The following list identifies key players on the implementation team. You can assign other roles based on your project's requirements and long-term needs.

- Implementation Manager or system administrator
- Information Systems (IS) Administrator
- Webmaster (required for Web installations only)
- Database Administrator (DBA)
- Customization Developer
- Review Team
- Pilot Group
- Other Resources

Implementation Manager or System Administrator

The Implementation Manager (or system administrator) is the team's primary contact person and is responsible for the overall implementation. This role requires system administration expertise and knowledge of your sales or support team's organization and requirements. As the project team leader, this person has final authority on implementation strategy and direction. The Implementation Manager (or system administrator) also handles any Network, Remote, or Web user issues.

Once the implementation is complete, the Implementation Manager typically assumes the role of system administrator to manage the on-going system administration. This includes administering user information, updating and maintaining a clean database, and customizing SalesLogix.

The amount of time it takes to support SalesLogix depends on how you choose to implement the system and the number of users. Consequently, it is important that the administrator be proficient in the selected databases and applications.

The administrator's required knowledge and experience will vary from installation to installation based on the relational database management system (RDBMS) selected.

Information Systems (IS) Administrator

The Information Systems (IS) administrator manages the required network components. This individual is typically responsible for any network issues that arise during and after implementation. The IS administrator must be proficient in the following areas:

- Windows operating systems
- Networking protocols
- Remote data transfers (RAS, FTP, or HTTP), if applicable
- Network architecture and configuration at your site

SalesLogix is a client/server application that requires on-going network administration, so the importance of involving an experienced Information Systems professional cannot be overstated.

Webmaster (for Web installations only)

If your installation includes the Web components, a knowledgeable Webmaster is vital to the implementation team. The Webmaster is responsible for Internet site administration and security.

Database Administrator (DBA)

The Database Administrator administers and maintains the SalesLogix database. This individual must have experience with relational databases, database structures (tables and fields), and database users.

The DBA also controls database security and performs routine maintenance and transaction recovery.

Customization Developer

The Customization Developer works closely with the SalesLogix Implementation Manager to design and customize SalesLogix. The Customization Developer must be proficient in the following areas:

- Basic scripts (VBScript, Basic Script, Cypress Enable).
- ActiveX Data Object (ADO) for data access.
- SalesLogix Architect (which provides a development environment similar to the Integrated Development Environment (IDE) found in Visual Basic).
- Microsoft SQL or Oracle.
- Cascading style sheets (CSS) (Web only).
- HTML and/or DHTML (Web only).
- Internet Information Services (Web only)
- JavaScript (Web only).
- Additional languages or applications necessary to customize your system.

Review Team

This team may include business owners, senior managers, sales or support managers, and sales representatives. Company executives on the Review team work with the Implementation Manager to ensure that the project meets strategic objectives. Managers and their staff define system requirements, determine customizations, and ensure the SalesLogix implementation meets their needs. This group can also function as a pilot group for the initial implementation. For Web installations, the review team should understand the requirements and approve *prototypes* of the system. (See, "Developing a Prototype" on page 7.)

Pilot Group

This team is the first group of users to test the product. Therefore, it should include individuals from a cross-section of the company. The team evaluates the SalesLogix implementation before it is available to all users. Members of this team review data, customizations, and workflow, and make recommendations for improvement. It is important that the pilot group include individuals from every segment of the company that will be using SalesLogix. Their feedback is essential to the successful integration of SalesLogix with current company processes.

Other Resources

In addition to individuals within your company, you may also want to consider the following resources:

SalesLogix Business Partners These individuals are certified to install and support SalesLogix. They can assist with any customizations and scripting that may be required.

SalesLogix Professional Services Group (PSG) This is an internal services department of Sage Software. The individuals in PSG are trained to manage the entire implementation project and can assist your Business Partner . Their services include customizations, data import, implementation planning, requirements definition, and installation configuration.

Consultants Internal or external consultants are another resource for implementation assistance. Although these individuals may not have the product experience, they can offer expertise in relational databases and client/server networks.

Setting an Implementation Schedule

As you plan your implementation, create a schedule for the tasks you want to accomplish. This schedule allows you to see the time required for each task and to organize your projected completion dates. Initially, keep the process as simple as possible, and then expand it as you go. Adding complexity to the system (such as elaborate customizations) extends the rollout accordingly.

The following sections identify the tasks associated with each phase in a SalesLogix implementation. You can add more tasks as needed. Once you identify tasks, assign estimated completion dates for each. You can save time and shorten the implementation cycle by combining some tasks or performing them concurrently. For example, you might conduct end user training during the final weeks of installation.

Planning Phase

- Identify an implementation team
- Perform a needs analysis
- Determine project requirements and specifications
- Establish hardware requirements and specifications

Note For Web installations, do not establish hardware requirements until after prototyping is complete.

Development Phase

- Determine the implementation schedule
- Develop a prototype (particularly important for Web installations)
- Review the requirements and prototype
- Finalize the prototype
- Approve and freeze customizations

Rollout Phase

- Install and set up the hardware
- Install SalesLogix components
- Import legacy data (if necessary)
- Enter the initial data
- Test the system

Training Phase

- Schedule Administrator training
- Schedule end user training

Review Phase

Review the installation and determine if modifications are necessary.

Developing a Prototype

SalesLogix is ready to install and use with only minor modifications. However, if your implementation plan calls for a large number of Remote users or many customizations, then a prototype is strongly recommended.

Developing a prototype is required for Web installations. Since many factors play a role in determining the number of Web servers your installation will require, a prototype is the only effective way to determine the needs of your company.

A prototype verifies that the application performs to your specifications and that the product operates in its intended environment. A prototype does not necessarily require a lot of customized views or reports in order to understand of key SalesLogix functions, such as security and synchronization.

Ordering and Installing Hardware

Determine what hardware you already have and the hardware you will need to purchase. Order your hardware (or software) as early as possible in the implementation cycle. Most manufacturers have an ordering lead-time (the time between your equipment order and delivery), so make sure that the hardware delivery fits into your overall schedule. Failure to plan for equipment orders may significantly affect your implementation.

Importing Data from Legacy Systems

SalesLogix easily imports ACT! by Sage; custom databases such as dBase, Paradox, and ASCII; and any database with ADO connections. You can import accounts, contacts, activities, notes, and history from legacy systems to SalesLogix, as well as map current users to SalesLogix users. Evaluate your company's existing systems and decide which systems will interface with SalesLogix.

Research your particular importing scenario in detail to ensure that the desired result is achievable. When importing data into SalesLogix, a Business Partner or SalesLogix PSG Engineer is a valuable resource. For more information, see Appendix A.

Training Administrators and Users

Do not underestimate the importance of training your system administrators and users. Train administrators to configure and manage the system, and train users in the everyday use of SalesLogix.

A number of Business Partners offer training; some are Web-certified. You may also take advantage of training from the SalesLogix Training Department.

- Everyone attending training must be familiar with the Microsoft Windows environment, including Internet Explorer. Administrators must have a good understanding of networking and relational database management systems (RDBMS).
- Administrators who attend Web product training must have knowledge of Web site administration and HTML.

SalesLogix training is available by contacting the Training Coordinator at 480-368-3700. You can also obtain class schedules and rates at the SalesLogix Training Web site (http:/training.saleslogix.com). Contact the Training Department as far in advance in advance of your implementation to ensure the classes and dates you want are available. If you prefer to have an instructor perform training at your site, be sure to also schedule an instructor in advance, and use a designated training facility or off-site classroom.

Understanding System Costs

When planning your SalesLogix implementation, it is extremely important to consider the total system cost. Depending on the system size and total number of users, the SalesLogix software, licenses, hardware, and third-party products may be only a small part of the total system cost. Other costs may include resources, customization, training, and so forth. The following sections list items that contribute to the total system cost that must be included in your budget.

Budgeting for General Costs

Consider the following costs and expenditures associated with all SalesLogix installations.

- SalesLogix licenses
- Support personnel
- Data import and conversion from legacy systems
- Overall implementation
- Customization
- Training

Budgeting for Network Installation Costs

These costs are associated with an installation where SalesLogix clients are installed on a network.

SalesLogix Server and Database Server Costs

- SalesLogix Server hardware
- RDBMS application
- RDBMS training (if applicable)
- RDBMS setup, administration, support, and maintenance resources
- Database licenses
- SalesLogix license

Administrative Workstation Costs

- Administrative Workstation hardware
- Additional software licenses (if applicable), such as Microsoft Outlook or Office
- System administrator training

- RDBMS application
- RDBMS training (if applicable)
- RDBMS setup, administration, support, and maintenance resources
- Database licenses

SalesLogix Client Costs

- SalesLogix user licenses
- SalesLogix Client hardware
- SpeedSearch licenses
- User training
- User support
- Additional software licenses, such as Microsoft Outlook, Exchange, or Office

Understanding SalesLogix Components

Each SalesLogix installation contains required and optional components that you use to meet your company's needs. This chapter explains the SalesLogix product components divided into:

- Core components (components required for every installation)
- Client components
- Remote components
- Web components

Using these components, you can create environments that support any combination of SalesLogix Network Client users, SalesLogix Remote Client users, Remote Office, and Web users.

This chapter also explains the two installation types available: express and standard.

To assist you further with planning your implementation, specific details about hardware configuration for the components listed in this chapter are discussed in Chapter 7, "Understanding SalesLogix Hardware."

SalesLogix Core Components

These components are required regardless of the other components you select for your system. They enable you to interact with your database and enter the licenses required to activate other components.

The core components are:

- SalesLogix Database
- SalesLogix Server and OLE DB Provider
- SalesLogix Administrative Tools
- SpeedSearch

SalesLogix Database

The SalesLogix database includes the structure, or *schema*, for SalesLogix.

SalesLogix Server and OLE DB Provider

The SalesLogix Server handles synchronization logging, manages user connections to the database, and enforces licensing. The SalesLogix Server can be installed on the SalesLogix Database Server, Synchronization Server, or a separate server.

The SalesLogix OLE DB Provider is a client-side component that communicates with the SalesLogix Server to gain database access information. The OLE DB Provider is installed with the SalesLogix Client applications.
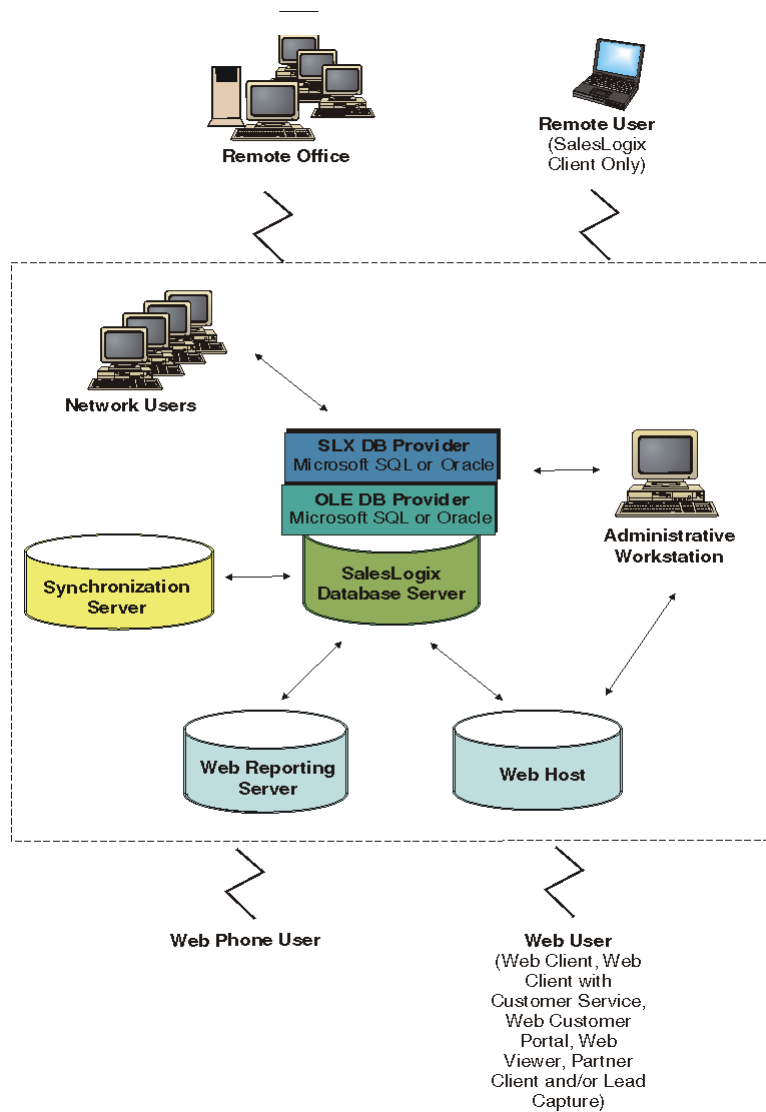
Figure 1 SalesLogix components

SalesLogix Administrative Tools

SalesLogix Administrative Tools are required for all other SalesLogix components to function, therefore, they must be included in every installation.

SalesLogix Administrator

The SalesLogix Administrator enables you to do the following:

- Add licenses
- Add and maintain users
- Create and edit security profiles
- Install bundles
- Create Remote databases (if required)

Architect

Architect is installed with the Administrative Tools and Servers, but you can also install it separately on any machine that has access to the SalesLogix database.

The Architect provides a development environment for creating customized views, menus, toolbars, and scripts for SalesLogix. These customizations are packaged together for installation as a unit or *bundle*. This enables your company to save and store any customizations, which is advantageous for upgrades. It also enables controlled release of customizations. All bundles are saved to files with the extension .sxb and work with any supported database type. Bundles are installed or uninstalled using the Bundle Manager in the SalesLogix Administrator.

.NET Extensions

The SalesLogix .NET Extensions Manager enables developers to distribute, license, release, and deploy customizations written in Microsoft .NET Framework. This utility provides an option for developers who prefer to build customizations in .NET rather than directly in the SalesLogix Architect.

SpeedSearch

SpeedSearch enables users to locate information in SalesLogix records such as defects and tickets, and in other documents on your network. When you configure the SpeedSearch Service, you specify the records from which the service must build indexes. If your company uses the SalesLogix Web components, your customers can search for information that is publicly available.

SpeedSearch Service

The SpeedSearch Service builds the indexes for SpeedSearch. The SpeedSearch Service can run on Remote users' computers and on the Remote Office according to the build schedule set up at the main office, however, a Remote user can override that schedule and set his or her own. For example, if a schedule is set up to build a certain index at 3 a.m. at the main office, it will run at 3 a.m. local time on the Remote users' computers (provided computers are powered on and users have not set their own schedule). If a schedule is not set and a remote computer is powered off when the main office builds the indexes, the indexes will be built when a user starts his or her computer.

A SpeedSearch Service can build indexes for only one SalesLogix Server, so if your company has multiple servers, you will need multiple SpeedSearch Services. In situations where there are multiple databases on a server, you may choose to distribute responsibility for the databases among multiple SpeedSearch Services. Since only one database can be assigned to one SpeedSearch Service, you must specify the database for each SpeedSearch Service using a configuration utility. Chapter 13 "Configuring the SalesLogix System" of the *Sage CRM SalesLogix Implementation Guide* explains this process.

SalesLogix Client Components

The SaleLogix Client is used for adding accounts, contacts, opportunities, tickets, defects, and so on to SalesLogix. In addition to the core components, one or more client components are required for your SalesLogix implementation. Client components are installed on your user's computers.

SalesLogix Client

The SalesLogix Client enables users to connect to the SalesLogix database to access and manage contacts, accounts, opportunities, contracts, tickets, defects, products, and returns.

Customer Service

The features in SalesLogix Customer Service allow SalesLogix Client users to effectively track, qualify, and resolve customer questions and issues. Customer service users can create tickets to track customer issues in order to improve customer satisfaction and organization efficiencies.

SalesLogix Marketing

The features in SalesLogix Marketing enable marketing departments to:

- Implement and track marketing campaigns.
- Track campaign responses that lead to new contacts and opportunities.
- Track opportunity results.

SalesLogix Marketing contains the following key features:

Capture Leads and Import Lists Marketing users can capture prospective customer information from a Web page or an external list of Leads. They can import a list of Leads from a tab- or comma-delimited file, matching the basic lead information (name, e-mail, phone, address, etc.) from the list to the lead record, without technical complexity.

Leads Through Marketing, basic information about each lead is captured in order to qualify the prospective customer. Data input is minimized so that Leads can be processed quickly and efficiently. When detailed information is needed, Leads are qualified and can be converted to Contacts, Accounts and Opportunities. Leads are separate from Accounts and Contacts. This helps keep the SalesLogix database free of invalid Accounts, and increases the quality of information in the database by only creating Contacts and Accounts for customers that are truly interested in the products and services being marketed.

Qualification Marketing users can qualify a lead that is imported into SalesLogix and convert it to a Contact and Account, and optionally create an Opportunity. If a Lead cannot be qualified, users can delete it from the system.

Campaign Management The new campaign functionality in Marketing allows users to track the target Leads and customers, and the stages in a campaign. It also helps users to capture budget and expense information related to the campaign so that it can be easily managed (even for non-Marketing professionals). The campaign and lead source can be tracked for each lead, contact, account, and opportunity.

E-Mail Marketing SalesLogix Marketing now offers an integration with a powerful e-mail based marketing tool. Users can select a list or group of Leads, Opportunities, or customers and generate richly formatted e-mail that is sent to all on the list. Users can track responses to the e-mail as well as remove targets from the list upon request.

Segmentation and Groups Customers can now be segmented using simple filtering tools to define groups or lists meeting specific criteria. Data can be exported to Excel for further analysis or to deliver mailing lists to external parties.

Campaign Reporting Marketing users can easily analyze the impact and cost of a marketing campaign and the resulting cost per lead through various reports.

Note The only marketing feature available to Web users is Campaign response tracking.

Sales Processes

Sales Processes help manage the sales pipeline. A sales process shows the steps users should complete as they work to make sales. The sales process can be set up to prompt users to perform activities, such as making phone calls and writing letters. Typically, a sales manager or administrator develops sales processes, which are then defined and released through the Architect. Users can then attach those processes to opportunities and manually drive the process from one step to the next.

Support

Support enables you to record, track, manage, and resolve customer inquiries and support issues. Using support, you can also access and manage tickets, defects, contacts, accounts, products, procedures, and returns.

SalesLogix Dashboards

SalesLogix dashboards allow you to display and interact with a variety of performance and analysis information in a dashboard format. You can use the data to gain insight into organizational and individual performance—and to discover root causes for performance issues—allowing you to take corrective actions or make strategic decisions. You can also interact directly with other functions in the SalesLogix Client, such as completing activities and navigating to opportunity views.

SalesLogix Mail Client

The SalesLogix Mail Client enables SalesLogix to access selected e-mail systems and insert an e-mail message into a contact's history, integrate with a personal address book, and create custom folders. A compatible e-mail system must be installed on the user's computer to successfully send and receive e-mail, add attachments, and perform other functions common to electronic mail systems. The SalesLogix Mail Client is installed with the SalesLogix Client.

The SalesLogix Mail Client is compatible with the following e-mail systems:

- Microsoft Exchange 2000 and 5.5
- Lotus Notes R5 in Office Mode
- Extended MAPI.DLL
- POP3/SMTP (POP3 Internet mail)
- IMAP4/SMTP (IMAP4 Internet mail)

Note   Check the Sage CRM SalesLogix SupportOnline/Sage Software Online Support and Services Web site (http://support.saleslogix.com) for a list of the currently supported versions.

SpeedSearch Client

SpeedSearch Client is a search engine that is installed on each SalesLogix user's computer. It enables queries to be submitted against the data and documents in defined indexes.

Remote Installation Components

Remote components support SalesLogix Client users at a location other than the main office. These components enable satellite offices and employees to access the SalesLogix database at your main office, share (synchronize) data, and reconcile changes made. These components are only required if your installation needs to support Remote users and/or off-site locations:

- Remote Office
- SalesLogix Remote Client
- Synchronization Client
- Synchronization (Sync) Server
- Synchronization (Sync) Service

Remote Office

Remote Office is an installation of SalesLogix at a location other than the main office (an off-site location). The Remote Office consists of a Database Server, Synchronization (Sync) Client, and SalesLogix Client computers. Remote Office users are network users that work on the central Remote Office database and do not individually synchronize with the main office database. Only the Remote Office database regularly synchronizes with the main office database. (Remote users not connected to the Remote Office synchronize directly with the main office. See Chapter 8, "Synchronizing in SalesLogix" on page 55 for more information.)

Set up the Remote Office if an off-site location meets the following criteria:

- There are more than five SalesLogix Client users located at the same off-site location.
- All users are working on (sharing) the same accounts.
- All users need to see each other's changes immediately.

SalesLogix Remote Client

The SalesLogix Remote Client is a stand-alone installation of the SalesLogix Client. The Remote user has a subset of the main office database in a local database on their computer, often a laptop. Synchronization is used to transfer changes between the SalesLogix Remote Client user's database and the main office database. Note that Remote users never connect to a Remote Office, they only synchronize with the main office.

If you have less than five SalesLogix Remote Client Users, and it is not important that they share or have immediate access to the same accounts, then each user can be set up as a Remote user. A sales person traveling or a lone regional representative at an off-site location are both examples of Remote users.

Note   SalesLogix Remote Client users can connect directly to the main office database if they have a network connection or a WAN connection with sufficient bandwidth.

Synchronization Server

The Synchronization (Sync) Server is the application that runs the synchronization process and agents between the main SalesLogix database and Remote users. Agents are a way to schedule reports, run scripts, and so forth. Regardless of the type of Remote Office database and Remote client your installation supports, you will require a Sync Server.

Synchronization Client

The Synchronization (Sync) Client enables the transfer of database changes between a Remote user or Remote Office and the database at the main office. The Sync Client is installed on the SalesLogix Remote Client or Remote Office computer. In a Remote Office installation with a high level of synchronization traffic, install the Sync Client on a dedicated machine.

Synchronization Service

The Synchronization (Sync) Service is a Windows 2000/XP/2003 service that communicates with the Sync Server(s) and the SalesLogix Administrator for scheduling purposes. It monitors synchronization by requesting information from the Sync Server and sending that information to the SalesLogix Monitor Console.
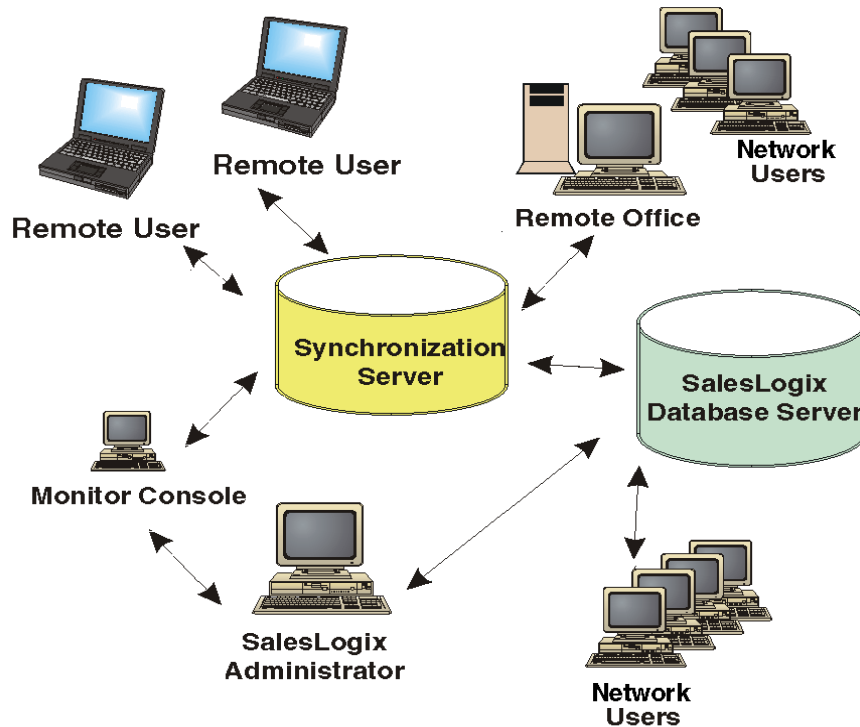
Figure 2 Remote Components in a SalesLogix Installation, and how they synchronize to the main database.

Considerations for Installing Remote Components

An installation that includes remote components requires all of the considerations of a network installation, as well as the following:

Synchronization Server requires:

- Sync Server license
- Sync Server hardware
- SalesLogix Remote Client user (if applicable)
- Named User license
- SalesLogix Remote Client hardware
- User training and user support
- Additional software licenses, such as Microsoft Outlook, Exchange, or Office

Remote Office (if applicable) requires:

- SalesLogix Remote Office Server license
- Named User Licenses for each installation of the SalesLogix Client
- SalesLogix Client hardware
- Remote Office Synchronization Client hardware
- Remote Office database hardware
- RDBMS license
- Additional software licenses, such as Microsoft Outlook, Exchange, or Office

Web Components

SalesLogix Web components bring together the accessibility of the World Wide Web and the power of SalesLogix. This combination gives your sales team, employees, channel partners, and suppliers a customer relationship management solution via the Web.

Web implementations require the following:

- The core SalesLogix components
- Sync Server (if your company has Remote Office or Remote users)
- A minimum of two Web servers: one to serve as the Web Host and one for Web Reporting

Web Host

The Web Host contains the functionality of the Web components and provides the interface between SalesLogix and Microsoft Internet Information Server™ (IIS). Your implementation may require one or more Web Hosts and virtual servers. Virtual servers enable you to scale your implementation without additional physical machines. The number of Web Hosts and virtual servers required to support your company's implementation depends on factors such as the number of active users, database size, and Web Host hardware. Companies installing the Web components must evaluate their individual requirements for the implementation. The only reliable method of doing this is to prototype your installation.

Web Manager

Web Manager is the configuration and customization tool for the SalesLogix Web components. By default, it is installed with the Web Host. You can also install the Web Manager separately on other computers for customization purposes.

Web SpeedSearch

The SalesLogix Web search functionality makes information in the SpeedSearch indexes available to your customers over the Web. Through the SalesLogix Administrator, your system administrator controls the type of information that is available to your customers. This can include information from defects, tickets, procedures, standard problems, standard resolutions, and other indexes.

Web Reporting

The Web Reporting components require IIS and are integrated with Crystal Reports XI from Business Objects. Crystal Embedded Server is automatically installed with Web Reporting. Crystal Embedded Server is a Web-based platform for reporting, analysis, and information delivery. Web Client users can access, run, and filter the same reports as SalesLogix Network Client users. The reports are managed through Architect and stored in your database. In addition, plugin security and data security are enforced. Web Reporting supports Microsoft Windows Server 2003.

Web Client Interfaces

The Web Client interfaces to SalesLogix are:

- Web Client
- WebViewer
- Web Customer Portal
- SalesLogix for Web Phones
- LeadCapture

Web Client

The SalesLogix Web Client allows users to access the following SalesLogix functionality: Accounts, Contacts, Opportunities, Ticket List, Activity List, Calendar, What's New, Library, Reports, and Processes.

Web Client Customer Service

Web Client with Customer Service enables internal employees to add or update support tickets, contacts, and related information. Employees can also search to find solutions to customers' problems and run reports.

WebViewer

WebViewer is a subset of the Web Client that is enabled with a license. WebViewer users have read-only access to accounts, contacts, and opportunities. Depending on account and calendar security, WebViewer users can add, edit, and delete activities, notes, and history, but cannot use reporting or processes.

Web Customer Portal

Web Customer Portal enables you to provide your organization's customers with user names and passwords so that they can view information about existing tickets and create new tickets, as well as search for solutions to problems.

SalesLogix for Web Phones

SalesLogix for Web Phones provides access to contacts, accounts, activities, and notes through Web-enabled cellular phones.

LeadCapture

LeadCapture provides the ability to collect information from prospects who access your company's Web site to inquire about your products or services. Use this information to automatically create new accounts and contacts in your SalesLogix database.

Adding Web Components to Your Installation

For a complete list of considerations for adding Web Components to your installation, see the *Sage CRM SalesLogix Web Implementation Guide*.

SalesLogix Utilities

SalesLogix also provides utility applications to aid in database customization and maintenance. They are installed as part of the Administrative Tools and Servers installation. The following explains the function of each utility and how it can be used in your installation.

SalesLogix Monitor Console The SalesLogix Monitor Console receives and displays information from the Synchronization (Sync) Service. You can install the Monitor Console in any location, on any computer that can connect to the computer on which the Sync Service is installed (the Sync Service is explained on). This enables remote monitoring of the status of the processes and jobs running on the Sync Server.

If your company has multiple administrators using the Monitor Console, they must be aware that any changes made to the services registered through one Console will affect what other Console users can see. Consequently, you must take care when registering and un-registering services. The Monitor Console Help explains this process.

TrnAnalyzer TrnAnalyzer compiles statistics of Transaction Exchange File (TEF) contents. TEFs are used by the synchronization process. The statistics are presented as a list of the tables affected by changes with the corresponding number of each type of change. You cannot edit the contents of a TEF. TrnAnalyzer displays what was logged and the number of instances, so it is useful for verifying that logging options are correctly set.

TrnViewer TrnViewer displays the contents of a TEF or server log used during synchronization. TrnViewer is view-only and does not enable you to edit the transaction.

Group Copy Group Copy enables you to copy account information based on available account groups from one database to another, even if the databases are of different types (such as copying Oracle to Microsoft SQL). In Group Copy, transactions are logged for synchronization.

Resynchronize Remote Database Resynchronize Remote Database recovers data from a Remote Client or Remote Office database that has not synchronized with the Host for an extended period or that is unable to synchronize due to other problems.

Integrity Checker Integrity Checker enables you to locate errors and correct records in your database. Integrity Checker uses the concept of test libraries where each library is a file that has one or more tests. You can add, edit and delete tests, add new test libraries, or merge test libraries. You can load more than one test library at a time or save tests to a different name.

Import Wizard The SalesLogix Import Wizard is a utility used for importing data into SalesLogix from other software applications, such as Goldmine or ACT!.

SalesLogix Profiler The SalesLogix Profiler provides a database independent profiling application to trace SQL and performance counters throughout the execution path of the SalesLogix Provider. You can profile any SalesLogix application(s) on your computer running the OLE DB Provider (such as the Network Client or Web Client).

SalesLogix Logging Folders

Each SalesLogix installation requires shared logging folders.

Sync Logs Folder The Sync Logs folder is the root folder for synchronization files. The first time the Sync Server runs, SalesLogix automatically creates subfolders under the Sync Logs folder for synchronization and other functions.

Documents Folder The Documents folder is the root folder for SalesLogix documents and for files attached to accounts, contacts, and opportunities.

Library Folder The Library folder is the root folder for the Library system and contains the entire contents of the Library.

SyncService Folder The SyncService folder is used to store the Sync Service configuration file. If your implementation does not include Remote users or Remote Offices, you do not need to create this folder.

The *Sage CRM SalesLogix Implementation Guide* contains more information about the recommended folder structure.

Before you install SalesLogix you must create the Sync Logs, Documents, and Library folders. (If you are using the Express installation, the Sync Logs folder is created for you. For more information about available installation types, see "Selecting an Installation Type" in this Chapter.)

If your implementation does not include synchronization, the logging folder (Sync Logs) is usually located on the Administrative Workstation (the computer where you installed the SalesLogix Administrator). In installations that use synchronization, the Sync Logs folder is best located on the Synchronization Server if it is a dedicated server. For more information about synchronization, see Chapter 8, "Synchronizing in SalesLogix." If you have a document server, you can use it for the Documents and Library folders.

Selecting an Installation Type

SalesLogix provides two installation options, Express and Standard. This section explains the differences between the two installation types and provides information to help you determine which is the best option for your company. This section also explains automated installations that you can create for SalesLogix Clients.

Express Installation

The SalesLogix Express Installation is intended for a SalesLogix configuration of 5 to 25 users on a Microsoft SQL Server database. If your implementation includes more than 25 users, the Web, Remote Offices, or an Oracle database, you should not use the Express Installation.

Note The Express Installation is for new SalesLogix installations only.

The Express Installation installs the following components on a single computer using system assigned default settings:

- SalesLogix Server
- SalesLogix Evaluation Database
- SalesLogix Blank Database
- Administrative Workstation
- Sync Server
- SpeedSearch
- SalesLogix Utilities
- SalesLogix Logging folders

This installation automatically uses the Local System Account as the SLXService User. For more information on this user type, see "SalesLogix Security and the Windows Operating System" on page 39. When you have completed the Express installation, you can install SalesLogix Clients.

Standard Installation

The Standard installation allows you to select the components you want to install, and the location for each component. The installation contains all components from Express installation plus the following:

- Web Components
- Remote Office
- Client Installations

With this installation type, you must manually create the SLXService User. For more information on this user type, see "SalesLogix Security and the Windows Operating System" on page 39.

Automated Client Installations

To reduce the time required to install SalesLogix, you can create automated client installations. Automated installations create executable files for the SalesLogix Clients that users can run to install SalesLogix on their own machines.

Automated installations require a shared network folder in which you create the installations and from which they are accessed by your users. Users can install the client(s) by accessing the folder directly or by using a shortcut received through e-mail.

Note   You can create SalesLogix Client and SalesLogix Remote Client automated installations. Installing the clients using an automated installation configures the client computer with the settings selected when the installation was built. Automated installations also reduce administration time when you upgrade to a new version, and then add new users to SalesLogix. During the upgrade process, you can update the client installation images directly from the upgrade wizard. Then, when you add new users and install SalesLogix, the installation includes all service packs and upgrades that are installed on your system.

SalesLogix and Supported Software

When planning your implementation, consider the software products and systems you currently use, and those that are required in order to use SalesLogix.

The products outlined in this chapter are compatible with SalesLogix. Some of these products are required for SalesLogix functionality, some must be purchased from a third-party vendor, and some ship with SalesLogix at no additional cost.

To verify supported software and supported versions, refer to the *Compatibility Checklist* on Sage Online Support and Services.

Operating Systems

SalesLogix is compatible with the following operating systems:

For Server machines:

- Microsoft Windows 2003 Server
- Microsoft Windows 2000 Advanced Server with Service Pack 3 or later
- Microsoft Windows 2000 Server with Service Pack 3 or later

For Client machines

- Microsoft Windows 2000 Professional with Service Pack 4
- Microsoft Windows XP Professional with Service Pack 2 or later

MDAC

SalesLogix uses Microsoft Data Access Components (MDAC) to access data. MDAC 2.8 is required for and distributed with SalesLogix, and must be installed before installing any SalesLogix components. The SalesLogix installation prompts you to install MDAC if it is not detected on the computer where you are installing SalesLogix.

Microsoft® Windows .NET Framework 2.0

.NET Framework version 2.0 is a component of the Microsoft Windows® operating system used to build and run Windows-based applications. .NET Framework is required for .NET Extensions on the Administrative Workstation, Architect, and SalesLogix Client computers.

Microsoft Windows Installer version 3.1 is required for use with .NET Framework version 2.0. SalesLogix automatically installs this if it is not detected on the computer where you are installing SalesLogix.

Internet Explorer Web Browser

SalesLogix requires Microsoft Internet Explorer Web browser, version 6.0. Internet Explorer is available for download from the Microsoft Web site.

Adobe Acrobat Reader

Adobe Acrobat Reader enables you to read the SalesLogix documentation distributed in PDF format. Adobe Acrobat Reader is available from the Adobe Web site.

Microsoft Office

SalesLogix is qualified for Microsoft Office versions 2000, XP, 2003, and 2003 R2.

If you are using Advanced Outlook Integration with Microsoft Office 2000, the SR1 Service Pack or later is required. For mail merge template management, you must install Word on each SalesLogix Client computer and on the computer on which you install Architect (usually the Administrative Workstation).

Word

The SalesLogix Client uses Microsoft Word for word processing functionality. You will need Word if you intend to use word processing tools such as creating templates, writing letters to individuals or groups, attaching documents to an individual's record, and creating history items to track the documents. SalesLogix provides a basic letter, memo, and fax template, or you can add your own templates.

Excel

You can export groups from the SalesLogix Client and the Web Client to an Excel spreadsheet.

Outlook

You can use Outlook as your e-mail program. Outlook integrates with SalesLogix and provides full functionality when you configure Outlook Integration in the SalesLogix Client.

SalesLogix Outlook Integration features enable exchange of e-mail messages and contacts between Microsoft Outlook and the SalesLogix Client. It allows you to send an e-mail message from SalesLogix—using Outlook as the e-mail system—or directly from Outlook to one or more contacts for the same or different accounts.

Since messages from customers often require immediate attention, messages from SalesLogix contacts can be flagged for follow-up in your Outlook Inbox. (You can turn this feature on or off.) You can also designate whether the system should review all new messages and flag those from SalesLogix contacts each time you log on to Outlook, or only as each message is received while Outlook is open.

You can also enable Advanced Outlook Integration, which offers additional features.

Note If you choose to install Advanced Outlook Integration, your users must not select Microsoft Word as their e-mail editor.

For more information about Outlook Integration or Advanced Outlook Integration, see the *Sage CRM SalesLogix Implementation Guide*.

Intellisync for SalesLogix

Intellisync for SalesLogix enables users to share their SalesLogix activities and contacts with Microsoft Outlook, GroupWise (export only), and Lotus Notes. Intellisync facilitates sharing information with non-SalesLogix users and enables synchronization of this data to a PDA from the groupware application.

Direction of Data Transfer

Each SalesLogix Intellisync user must set configuration options and determine the direction of data transfer between the groupware application or Palm device and the SalesLogix database. Since this configuration process can be complicated, the system administrator or implementation manager should plan on providing initial implementation assistance for each Intellisync installation.

The data direction options are:

- **Import** pulls data from your groupware application or Palm device into the SalesLogix database. This option updates only the SalesLogix database; the data in the groupware application or Palm device is not affected.
- **Export** sends data from the SalesLogix database to your groupware application or Palm device. This option updates only the data in the groupware application or Palm device; the SalesLogix database is not affected.
- **Synchronize** compares data in the SalesLogix database to the data in your groupware application or Palm device and updates both sets of data as needed. This option is selected by default.

SalesLogix Activities, Contacts, and Events

When you delete a contact, activity, or event from your groupware application or Palm device, SalesLogix Intellisync does not directly delete those items from the SalesLogix database; instead, a flag marks them as deleted by Intellisync. SalesLogix Administrators have the option of viewing and deleting the flagged records.

Note   You should include this as an administrative role in your company's Implementation Plan. Administrative Roles are discussed on .

Conflict Resolution

Each user can control how conflicts between SalesLogix and a groupware application or Palm Operating System (OS) device are resolved by either marking a particular application as the source for automatic conflict resolution or by choosing to be notified when a conflict occurs. Notification allows users to compare the fields in question, and then make their own decisions regarding the data. Your system administrator should plan to create shared decisions for shared contacts.

Customization

Each user can customize SalesLogix Intellisync to work the way he or she does. A user can specify the groupware or Palm data and corresponding SalesLogix data to use. Or a user might customize the data transfer by specifying or modifying individual field maps between the other application and SalesLogix. Intellisync contains typing rules that block invalid mapping combinations. Furthermore, users can specify the date range to include timed items or turn off synchronization for completed to-do items. The *Sage CRM SalesLogix Administrator's Guide* provides information about field mapping and advanced synchronization settings. This is an area where your system administrator or implementation manager must provide guidance to individual users.

Intellisync for SalesLogix Requirements

To use Intellisync for SalesLogix and share data between two applications, you must:

- Be a licensed user of both SalesLogix and the groupware or Palm application.
- Create an ad hoc group in SalesLogix to identify the contact records that will synchronize with the groupware application.

Application Versions

Intellisync for SalesLogix is supported for the following applications:

- Devices running Palm OS (version 3.x and 4.x)
- Lotus Notes (version 5.x)
- Microsoft Outlook (versions 2000, XP, and 2003)
- SalesLogix Client

Crystal Reports Reporting Software

Crystal Reports XI is a third-party software reporting tool by Business Objects. It is used for creating custom reports. A SalesLogix administrator usually creates new reports; however, any SalesLogix user can create new reports if a supported version of the Crystal Reports software is installed.

Use the SalesLogix Architect to save reports as plugins, and then release them to specific users or groups. You can integrate reports directly into dashboards and analytical summaries.

The typical SalesLogix Client installation includes Crystal Reports Runtime files, which enable network and remote users to view and print SalesLogix Reports without needing a full Crystal Reports installation. Crystal Reports is also available over the Web, and addresses all steps in the reporting process; from data access to report design, management and delivery, and report integration with portals and applications.

SalesLogix also provides an API for collecting a dynamic list of all open reports.

Fax Capability

Fax is available through the Microsoft Fax Service. This free Fax package ships with Windows 2000, XP, and 2003 and interfaces with the SalesLogix Fax Provider. SalesLogix also provides an API for integrating other fax providers.

Note   Additional third-party products may be used. For more information, see the SalesLogix Add-ons and Solutions Web site at http://techpartners.saleslogix.com.

Chapter 4
Understanding SalesLogix Licenses

Licenses control access to SalesLogix features. They also determine the number and type of users that can access SalesLogix. You must add licenses before the SalesLogix components are available for use and before adding users (Network, Remote, Concurrent, etc.). For information about purchasing SalesLogix products and licenses, see your SalesLogix representative or Business Partner.

This chapter lists the available licenses and explains the functionality they enable in SalesLogix.

SalesLogix Licenses

There are three SalesLogix licenses that control specific features and functionality. Licenses provide access to the SalesLogix Administrator and Architect. The first time you log on to the SalesLogix Administrator, you must install one of the following licenses.

License Name	Available Functionality	Restrictions / Exceptions
Standard	- Account and Contact Management - Sales Opportunities - Marketing Campaign Management - Customer Service - The ability to apply bundles containing any plugin type - Architect: You can open and edit an existing form, and save your changes under a new version number.	In Administrator: - No access to Administrative Roles. - No access to Feature and Team security, so users share all information. - No access to agents. In Architect: - You can edit existing customizations, and save your changes, but you cannot create new customizations. - You can edit existing Contact Processes, but cannot create new. - You cannot edit any other plugins including stand-alone scripts or main views. - You cannot copy or paste in the Plugin Manager. - You cannot access the Stored Procedures manager or the Secured Functions manager.

License Name	Available Functionality	Restrictions / Exceptions

Advanced	Provides all functionality in the Standard license plus the following:
	
	• Web functionality (including Web Customer Portal).
	• Sales Opportunity Statistics.
	• Update Multiple Sales Opportunities.
	• Sales Processes.
	• Full Administrator capabilities including:
	  • User security.
	  • Field-level security.
	  • Administrative Roles.
	  • User teams.
	  • Agents.
		In Architect:
		
		• You can edit existing customizations, and save your changes, but you cannot create new customizations.
		• You can edit existing Contact Processes, but you cannot create new.
		• You cannot edit any other plugins including stand-alone scripts or main views.
		• You cannot copy or paste in the Plugin Manager.
		• You cannot access the Stored Procedures manager or the Secured Functions manager.

Premier	Provides all functionality in the Standard and Advanced licenses plus full Architect capabilities.	None

SpeedSearch License

All SalesLogix users and systems receive standard SpeedSearch features:

• Ability to view the standard indexes (Attachment, Defect, Defect Internal, Document, Library, Procedure, Standard Problem, Ticket, and Ticket Internal)
• Ability to set up schedules to rebuild each standard index at certain times or intervals.

The SpeedSearch Advanced license allows SalesLogix users to have additional functionality.

License Name	Available Functionality	Restrictions / Exceptions
Advanced	Allows the SalesLogix Administrator to add new (custom) indexes and edit the standard indexes. Custom indexes can search anywhere inside the SalesLogix system or within file directories on your network. The SpeedSearch Advanced license limits the number of users who can access SpeedSearch to the number specified in the license. You can purchase licenses in quantities to meet the needs of your company.	Custom FileSystem indexes are not available to remote users.

Server Licenses

Server licenses apply to SalesLogix software installed on one or more servers.

License Name	Available Functionality	Restrictions / Exceptions
Customer Portal	Enables a set number of users to access the Customer Portal features using the Internet. The license is available for any number of users that your company requires. This license is required in addition to the Web Host license and the External Access License.	
External Access License	Required for each external application that accesses SalesLogix data with the SalesLogix OLE DB Provider and makes such data available to non-SalesLogix users. This license is not required for customizations built solely for use within a SalesLogix Client (including bundles and applications inside a SalesLogix Client) since only SalesLogix users can access these customizations.	
LeadCapture	Activates the ability to collect information from a Web site and directly populate the database. A Web Host license is also required.	
Remote Office Server	Allows one server to synchronize data between a satellite office and the main office database. When this license is installed, each user who has been assigned a Named User license can access the SalesLogix Database through the Remote Office Server.	
Synchronization Server	Permits one server to synchronize data between the SalesLogix main office database and remote databases. When this license is installed, each user who has been assigned a Named User license can remotely access the SalesLogix Database through the Sync Server.	
Oracle Host Database	Required to install SalesLogix on an Oracle database.	This license should not be confused with any license(s) required from Oracle for the rights to use an Oracle database.
Web Host	Enables you to install and configure the Web Host, which provides access to the SalesLogix Database using the Internet. This license is required for the Web Client, Web Client Customer Service, and SalesLogix for Web Phones, as well as the other Web components. All User licenses provide access to the SalesLogix Database through the Internet, but the number of users logged on at one time cannot exceed the number of licenses issued.	

User Licenses

User licenses enable user access to SalesLogix.

License Name	Available Functionality	Restrictions / Exceptions
Concurrent User	Concurrent User licenses allow multiple SalesLogix users to share the same license. However, only the number of users for which you have licenses can log on at the same time. For example, if you have 40 users and a 30 Concurrent User license, all 40 users can log on to SalesLogix but only 30 can be logged on at the same time. Concurrent users can log on to the Web Client, SalesLogix Client, Administrator, Architect, Sync Client (Remote Office only), and a Remote Office. Every logon will consume one Concurrent User license. For example, if Samantha Brink logs on to the Web Client and SalesLogix Client and leaves them both open, it will consume two licenses. Concurrent User licenses can be divided between the Host and any or all Remote Offices. This assignment can be changed at any time. When you assign Concurrent User licenses to a Remote Office, the Host assumes all Remote Office licenses are consumed at all times. For example, if you have a 30 Concurrent User license and you assign 10 licenses to one Remote Office, the Host automatically subtracts the 10 licenses and only allows 20 Concurrent Users to log on to applications at the main office.	• Remote users cannot be Concurrent users. • Logging on to a Third Party product, like ADO Explorer, using the SalesLogix Provider and a SalesLogix Concurrent user name and password will consume a license.
Named Add-On User	This license type, for use by third-party add-on products possessing a custom interface, enables creation of a SalesLogix user profile. It provides rights to use the SalesLogix OLE DB Provider, but does not permit logging on to any SalesLogix Client.	
Named User (Network User or Remote User)	Each license enables a single named user to access any number of copies of any Web, Remote, or SalesLogix Network Client software using a PC, laptop, Web phone, or browser. One license is assigned per user for each named user. For example, if you have 100 Named User licenses, only the 100 users whose names have been attached to a license can log on to SalesLogix.	

License Name	Available Functionality	Restrictions / Exceptions
Named Web User	Grants Internet access to the SalesLogix Database via the Web Host server for a single, named user for each Named Web User License granted. Internet access may be by a browser or Web phone. Named Web Users may not access any Remote or Network Client Software.	
WebViewer (Restricted Use)	Enables Internet access to the SalesLogix Database via the Web Host server. Each WebViewer License permits access by one named user. Internet access may be by a browser or Web phone. Users are limited to read-only access to Sales information, although they can create and edit notes, history, and activities. Users do not have access to reports.	The Web Host License is required in conjunction with the WebViewer license.

Chapter 5
Understanding SalesLogix Security

The two types of security in SalesLogix are database security and account security. This chapter contains information about both.

SalesLogix Database Security

SalesLogix database security is controlled by the SalesLogix OLE DB Provider. The provider can be explained as a layer between ADO and the OLE DB provider native to your database type (Oracle or Microsoft SQL Server). The SalesLogix OLE DB Provider enforces field and record-level data security on all queries passed to the SalesLogix database.
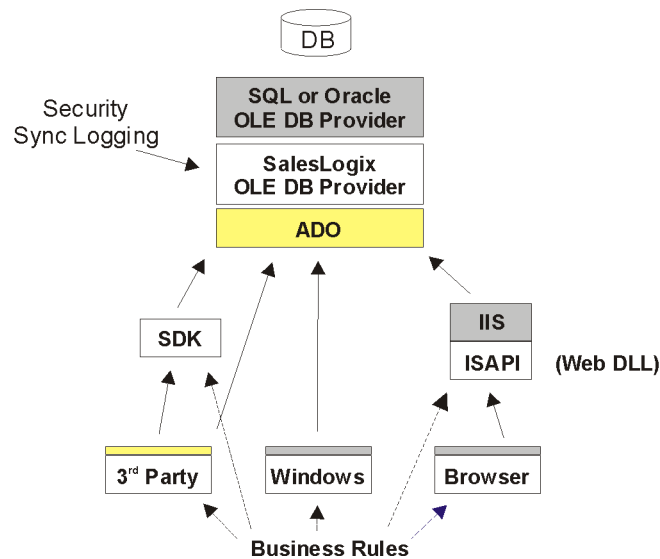
Figure 3 SalesLogix Architecture showing the SalesLogix OLE DB Provider

The SalesLogix system architecture is made up of three physical tiers. These tiers can exist on the same machine, in any combination on two machines, or on three separate machines in a network. The tiers are:

Tier 1: Database Server This could be any of the databases supported by SalesLogix.

Tier 2: SalesLogix Server The SalesLogix Server components handle synchronization logging, manage user connections to the database, and enforce licensing.

Tier 3: SalesLogix applications (includes SalesLogix, Administrator, Architect, utilities, etc.) SalesLogix applications use the SalesLogix OLE DB Provider. The SalesLogix applications communicate with the SalesLogix Server to access information, but then communicate directly with the Database Server via the SalesLogix OLE DB Provider.
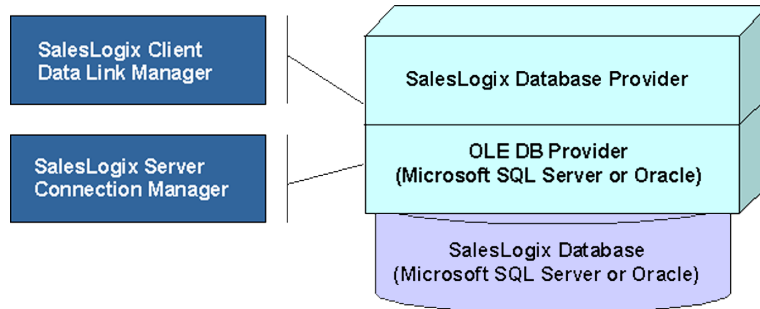
Figure 4 The SalesLogix Provider in detail

Connection Pooling

The physical connection to your SalesLogix database uses OLE DB Connection Pooling. Each client query uses one connection from a pool of connections available for use on the SalesLogix Server, and then releases the connection when the query is complete. So a user might be logged on to SalesLogix, but if he or she is not retrieving information from the database, a connection to the database is not being consumed.

More information about how OLE DB manages a shared pool of connections is available in the documentation on the Microsoft Developers Network.

SalesLogix Security and Other Software Applications

The SalesLogix OLE DB Provider uses standard Microsoft ADO and requires no proprietary API calls to access data. This means that Visual Basic, Active Server Pages (ASP), Crystal Reports, or any other application that uses a standard OLE DB connection can access SalesLogix data as a client.

The SLX Provider must also be installed for third-party applications that use SalesLogix API (SLAPI) or the OLE DB Provider externally.

Third-Party Access Scenarios

The SalesLogix OLE DB Provider controls access to SalesLogix data from external applications by allowing the system administrator to use passwords to restrict access. The system administrator has three options for controlling third-party access to SalesLogix.

No Access - Third-party applications cannot access SalesLogix data.

Read-Only Access - Third-party applications can import SalesLogix data but cannot make changes to the SalesLogix database.

Read/Write Access - Third-party applications can import SalesLogix data and make changes to the SalesLogix database. The system administrator can specify passwords during installation or at any time afterwards using the SalesLogix Connection Manager. Users who log on to SalesLogix through a third-party application with a connection string containing the appropriate password are granted the correct access. (More information about connection strings is available in the *Sage CRM SalesLogix LAN Developer's Reference*.)

Note   To prevent all access, the system administrator must set the Read/Write and Read-Only passwords.

The following table describes how password settings influence third-party access:

Password Setting	Third Party Access
No Read/Write or Read-Only Access.*	Read/Write
	If no default password is set, a user can access SalesLogix data through a third-party application, and the application can write to the SalesLogix database.
Only the Read/Write password is set (Read-Only is blank).	Read/Write if the required password is passed in the connection string.
	A user can access SalesLogix data through a third-party application. The application can write to the SalesLogix database, however, only if the appropriate password is passed through the connection string.
Read/Write password is set to one password, and Read-Only is set to a different password.	Either Read/Write or Read-Only depending on which password is passed through the connection string. Otherwise, no access.
	A user can access SalesLogix data through a third-party application only if the appropriate password is passed through the connection string.
Read/Write and Read-Only passwords are identical.	Read/Write (the most access "wins") if the required password is passed through a connection string. Otherwise, no access.

*If no Read/Write password is set, the Read-Only password is not used (the Password box is unavailable in the Connection Name dialog box).

SalesLogix Product Security

SalesLogix enables your company to implement the level of product security that is appropriate to your needs. Using a combination of account ownership, security privileges, and team membership, security can range from none to stringent. This approach gives SalesLogix the adaptability and flexibility to meet the needs of a wide variety of companies.

Understanding Account Ownership

Security in SalesLogix is based on account access. To understand how this works, it helps to understand the role of the account in SalesLogix.

Accounts are the fundamental units of the SalesLogix system. From the perspective of the SalesLogix Client user, an account is any company that a salesperson is working with on a sale. Contacts are the individuals at the company, and potential sales are the opportunities. An account can have many contacts and opportunities associated with it. These contacts may have activities and history items related to interactions with a salesperson. Users who do not have security access to the account are unable to access any account-related information, including the activities and history items.

From the perspective of the customer service or support user, an account is the company that has purchased or may purchase your company's products. Contacts are the individuals at the company, and tickets are the reports received from contacts who are logged with your Support Center. Information about defects and returns are also recorded by account. When users do not have access to a particular account, they cannot see any record associated with that account.

Account access is referred to in the system as Account Ownership. The three levels of Account Ownership are:

- Individual User
- Team
- System

Accounts are created in the SalesLogix Client. An individual user, a team of users, or everyone can own Public accounts.

During the planning stage, it is imperative that you consider your users and the access you will allow them to certain areas of your system. When you add customizations to your implementation, remember that SalesLogix core tables will enforce Account-level rights and filter data accordingly.

Individual User

Each user added to SalesLogix has a user profile. Settings in this profile determine the user's ability to access accounts, edit account records, create new accounts, and assign account ownership. You can control access to data at the table or field level. A user can have one set of access rights as an individual owner of an account and another set as a member of a team who owns an account. For example, a user who owns an account as an individual has full access rights to all tables and fields, but might be limited to view-only rights as a member of a team.

Team

A team is a group of users who require access to the same set of accounts. You create teams in the SalesLogix Administrator. Teams define who owns an account and which users can access that account. When creating teams, consider what the team members have in common and what information they need to share.

A user automatically has access to accounts owned by any team to which they belong. For example, Lee Hogan belongs to the Midwest team and has access to all accounts owned by that team. However, Lee is not a member of the Northeast team, therefore does not have access to accounts owned by the Northeast team.

Department A department is a specialized team. All users must be assigned to a department. (By default, SalesLogix assigns all new users to the "None" department.) You can add a department to a team, and by doing so, everyone in the department has access to all of the accounts for that team. When a user is a member of both a team and a department assigned to the team, rights for the team prevail. A Department cannot own accounts.

System

There are two system teams:

Everyone This system team automatically includes all SalesLogix users. When an account is owned by Everyone, any SalesLogix user may view, edit, or delete account information or even delete the account itself. Consequently, using Everyone equals having no security. For this reason, SalesLogix recommends creating specific teams, rather than using the Everyone system team.

Everyone - View Only This system team allows all users to view all of the accounts in the system, but withholds editing rights. This enables users to access accounts to answer customer questions, but still maintains a level of security by preventing those account records from being edited.

Understanding Security Profiles

Account security can be restricted at the individual and team level. The system administrator can implement more advanced security (field-level security) by specifying access rights to tables, fields, and application functions. You can restrict a user's access to any item on a view in the SalesLogix Client, since each of these items has a corresponding field in the database. This access may be set to read/write, read-only, or no access. This is done in the SalesLogix Administrator. Users cannot modify their own security profiles.

Note Security profiles do not apply to the Web.

Individual Security Profile A user's individual security profile determines that user's access to accounts, contacts, opportunities, and tickets. Each user's security profile for the SalesLogix Client is determined by the permissions the user is given in the SalesLogix Administrator on the Security and Teams tabs in the user profile. When the account is owned by an individual, that individual always has read/write access.

Team Security Profile Each SalesLogix Client user's team security profile dictates the user's access rights when an account is owned by a team. Each team can have multiple Team Owners. Additional team members have default rights as assigned on the Teams tab in their user profiles.

Team Owner Profile The Team Owner Profile is the only security profile that can change ownership. Any number of team members can be team owners.

The default security profile determines which profile will be assigned when the user is added to a team or to another user's team. When a user is added to a team, you can choose to have his or her manager added to the team by default.

Separate security profiles can exist for a user as an individual and as a team member. Consequently, a user may have one security profile for accounts owned by another individual and another for accounts owned by teams.

It is also possible for a user to have a separate security profile for each team to which he or she belongs. Consequently, a single user can have many security profiles, or as few as one.

Security profiles are generic and, once created, can be assigned to multiple users. You can evaluate your access requirements and build several generic security profiles for a large group of users rather than creating a custom security profile for each user.

For example, you may want one security profile for Sales Representatives that only allows them to view certain data. You may have another profile for Support Representatives that allows them to view all data, but only edit certain fields. Then, you could have an additional security profile for Sales Managers, Regional Managers, or Support Managers that allows read and write access to all data.

Your customer support department will not be able to access information for callers unless they are a member of the team that owns that account. For this reason, some companies choose to assign their support department to all teams, but give read-only privileges for certain views.

Calendar Security

The calendar is a feature in the SalesLogix Client. Depending on their access rights, individuals can view or modify other users' calendar activities or events. When setting calendar permissions, you should evaluate the structure of your company as well as the informational needs of your users.

By default, new SalesLogix Client users do not have access to any other users' calendars. To enable access to another user's calendar, your system administrator must provide the permissions for that calendar. You will probably want to retain some limitations on who can view and edit calendars. For example, Lee Hogan may have calendar access to sales representatives in his region, however, he cannot view or edit the calendar activities of any other users.

All calendar activities and events are updated during synchronization based on the access granted to each individual or team. Allowing users to access other user's calendars will increase the number of synchronization transactions.

Determining Security in the Web Products

Before you implement the Web components, you must understand the security differences between SalesLogix Network and Web products. Unlike security in the SalesLogix Network and Remote Client, security profiles do not apply for the Web components. Although account ownership determines what accounts users can view, you must use template security to limit the user's ability to add, edit, or delete accounts. For example, if a team using the SalesLogix Network Client can view accounts but not edit them, that team can still edit those accounts from the Web Client unless the appropriate template security is set up. The SalesLogix Web Manager online Help explains setting up template security in detail.

Identifying Administrative Roles

The SalesLogix Administrator is used to manage users and configure SalesLogix applications (such as the SalesLogix Client). Access to the SalesLogix Administrator is limited to the system administrator and to those users who have been assigned administrative roles.

You will need to decide whether to use administrative roles. If so, you will need to decide how many and who will be assigned to each role. Keep the number of administrative roles to a manageable level so that they are not difficult to maintain. In addition, keeping a record of users and their roles helps maintain the integrity of your database

System Administrator

The system administrator is the only user with full access to all features and functions in SalesLogix. The administrator's access is activated when a SalesLogix license is installed. You cannot modify the Admin user.

Administrative Users

SalesLogix users can be assigned an administrative role, enabling them to perform tasks in the SalesLogix Administrator, normally reserved for the system administrator. These users can log on as themselves and do not have to log on as the administrator.

Note   Administrative Roles are not available under the SalesLogix Standard license.

The default administrative roles are:

Sales Admin   Users assigned this role can perform all functions except using the Database Manager and modifying the Library.

DB Admin   Users assigned this role can perform all functions except realigning territories, modifying sync transfer profiles, and modifying the Library.

Librarian   Users assigned this role can only modify the Library.

You can also create any number of custom roles that meet the needs of your company. For example, you may grant one user the ability to only change user passwords.

Users assigned administrative roles require access to the SalesLogix Administrator in one of two ways. Either the SalesLogix Administrator can be installed on the administrative user's computer, or the administrative user can log on to the SalesLogix Administrator on the Administrative Workstation. Administrative users are able to access only those features and functions for which an administrative role has been assigned.

The "Managing Administrative Roles" topic in the SalesLogix Administrator Help provides more information and instructions for creating Administrative Roles.

SalesLogix Security and the Windows Operating System

Due to restrictions in security within the Windows operating system, the ability to perform certain functions is restricted to users who have been designated Administrative users in the Windows operating system. These functions are:

- Installing and/or upgrading the SalesLogix Client. This task includes opening the Account, Contact, Opportunity, Defect, Return, Contract, and Ticket views, or *Main* views, in the SalesLogix Client on each computer where it is installed. Failure to do this makes Main views inaccessible.
- Performing some configuration tasks.
- Performing additional integration in the SalesLogix Address book. (This only applies if using Outlook Integration.)

If you choose to implement higher security levels and set all SalesLogix Client users as restricted users, then the system administrator will need to perform these tasks. If you leave all SalesLogix users in the Windows Administrators group, they can perform these tasks for themselves.

Restricted users are able to use the SalesLogix Client.

You will also require the following Windows domain users if you are installing the SalesLogix Client on a Windows operating system:

SLXService user This is a Windows logon name with security permissions that allow the SalesLogix Provider and synchronization to access all necessary directories.

Note In the SalesLogix Express installation, the local system account performs the function of the SLXService user.

WebDLL user This user is required in companies where any of the SalesLogix Web components will be used.

Depending on the type of installation your company selects, these domain users may be created for you. The *Sage CRM SalesLogix Implementation Guide*, the *Sage CRM SalesLogix Web Implementation Guide*, and Windows Help provide more information on how to create these users and why they are necessary for your SalesLogix implementation.

Using Windows Authentication

With Windows Authentication, users are automatically logged on to SalesLogix without entering their SalesLogix user names or passwords. Users' Windows IDs are stored in the SalesLogix database paired with their SalesLogix user names and passwords. When a user opens SalesLogix and their Windows Login ID does not match the one recorded in SalesLogix, the user must log on to SalesLogix manually.

Windows Authentication is enabled by default. It can be disabled by your SalesLogix Administrator.

If you import Windows users into the SalesLogix user's list, their Windows IDs are copied into SalesLogix. During the import, you can choose whether to copy address book information to the user's SalesLogix profile.

Note   This method of security does not apply to the SalesLogix Web Client.

Selecting a Database Management System

The relational database management system (RDBMS) and the server hardware on which the database resides, significantly impacts performance of your SalesLogix implementation. The size and type of the database affects the server's size and configuration, so before acquiring new hardware or allocating existing hardware for the database and server, read this chapter.

This chapter addresses:

- Database Considerations
- Supported Databases
- Database Hardware

Database Considerations

The appropriate database for your needs will depend on the size of your company, the SalesLogix products that you install, and the location (on- or off-site) of your users. In addition, the following key elements affect your choice of RDBMS.

- Number of accounts and contacts
- Number of active users
- Number of new tables and fields added for any customizations

You will need to consider these elements in relationship to the advantages and disadvantages of the available databases.

Number of Accounts and Contacts

Many tables in SalesLogix depend on the presence of an Account record. Generally, each account is associated with multiple contacts, each of which may have multiple history records.

Use the number of anticipated accounts and related contacts as a guideline when determining the optimal RDBMS. The greater the number of records, the greater the load on the RDBMS. As the number of accounts and contacts increases, a more robust and scalable database is needed.

Number of Active Users

Active users are the number of users on the system at any one time. The larger the number of active users, the greater the load on the RDBMS and the SalesLogix Server. As the number of concurrent users increases, a more robust and scalable RDBMS is needed.

Number of New Tables and Fields Added for Customizations

Adding new tables and fields to support customizations will impact the size of the database. Consider the number of tables and fields added multiplied by the number of records that will be storing data in those tables and fields.

Understanding Supported Databases

SalesLogix supports the following databases:

- Microsoft SQL Server
- Microsoft Data Engine (MSDE) and SQL Express
- Oracle

Each database type has advantages and implementation considerations.

Microsoft SQL Server

Microsoft SQL Server is an excellent choice for a SalesLogix database because it is scalable and powerful, yet relatively easy to learn and administer.

Advantages

- Optimized for the Windows environment
- Configuration tips are available
- Easy to back up and restore
- Scalable and robust
- Relatively easy to support
- Provides the capability to create MSDE databases for distribution to your Remote Offices and SalesLogix Remote Client users.

Implementation Considerations

- Schedule regular backups of the log device to prevent it from filling the space allocated.
- SQL Server 2005 requires .NET Framework 2.x, which will be installed during the SQL Server 2005 installation.

MSDE

Microsoft Data Engine (MSDE) is a redistributable database engine. It is designed and optimized for use on smaller computer systems, such as single-user computers or small network servers. This makes MSDE suitable for use by the SalesLogix Remote Client.

MSDE must be used for creating remote databases and can be used for Remote Offices with ten or less active users. Remote Offices with more than ten active users will find performance on MSDE inadequate. Databases created with MSDE 2.x are compatible with Microsoft SQL Server 2000. Both support many of the Transact-SQL commands. MSDE also logs transactions, so if anything goes wrong while writing to an MSDE database (e.g., disk error, network failure, or power failure), MSDE can use its transaction log to revert to its last consistent state.

Advantages

- Optimized for the Windows environment
- Capable of exchanging data with Microsoft SQL and Oracle

Implementation Considerations

- 2-gigabyte database size limit
- Supports up to two processors

SQL Express

SQL Server Express uses the same database engine as SQL Server 2005. It is designed to provide a database platform that offers superior ease of use, enabling fast deployments for its target scenarios. Multiple SQL Server 2005 Express installations can coexist on the same machine along with other installations of SQL Server 2000, SQL Server 2005, or Microsoft Desktop Engine (MSDE).

Advantages

- Optimized for the Windows environment
- Capable of exchanging data with Microsoft SQL and Oracle

Implementation Considerations

- 4-gigabyte database size limit
- Supports one processor

Oracle

Oracle is an extremely capable RDBMS. However, to achieve satisfactory performance, the hardware requirements are stringent. When Oracle is installed, the number of CPU processors, amount of RAM, and size of disk drives increase significantly.

Advantages

- Extremely configurable
- Handles large databases and a large number of concurrent users and tables when installed on a UNIX platform
- Extremely scalable on a UNIX platform

Implementation Considerations

- Requires extensive experience to achieve competency in administration and tuning.
- Tables must be sized correctly before the data is loaded. Otherwise, additional table extents or data files may be required.
- Extremely sensitive to disk contention due to its use of multiple processes. As a result, several physical disk drives are often necessary. Consequently, the files that are spread across these drives must be evaluated before any data is loaded.
- Separate data, index, and temporary tablespaces are recommended.
- To support synchronization, you must install MSDE on the Administrative Workstation in order to create remote databases.
- Each user machine that will connect directly to the Oracle database must have the Oracle Client and Oracle OLE DB components installed. This includes the Sync Server and the Administrative Workstation, but not machines that use synchronization to connect to the Oracle database.
- The major version of the Oracle Client must match the major version of the Oracle Database. For example, if the database is Oracle 9.2.0.6, then the Oracle Client must also be 9.2.0.6.
- The major version of Oracle should match the major version of the Oracle OLE DB components. For example, if you are using Oracle 9.2.0.6, then the Oracle OLE DB components should be 9.2.0.6.

Understanding Supported Versions for SalesLogix

The following sections list the supported databases and database versions for a SalesLogix main office, Remote Office, and Remote Client.

Main Office Databases

SalesLogix supports the following RDBMS for the main office:

- MSDE 2.x (Service Pack 3 or later recommended), Microsoft SQL Server 2000 and SQL Server 2005
- Oracle 9.2.0.6 or later

Remote Office Databases

SalesLogix supports the following RDBMS for the Remote Office:

- MSDE 2.x (Service Pack 3 or later recommended), Microsoft SQL Server 2000 and SQL Server 2005, MS SQL Express
- Oracle 9.2.0.6 and later

SalesLogix Remote Client Databases

For the SalesLogix Remot Client, SalesLogix Client supports MSDE 2.x (Service Pack 3 or later recommended), MS SQL Express, Microsoft SQL Server 2000, and SQL Server 2005.

Your choice of database for Remote Offices does not depend on the database selected for the main office. For example, you can use Oracle at your main office and SQL on your Remote Offices.

Database Backups

It is important to have a reliable, well-tested strategy for backing up your current database before rolling out SalesLogix. Frequent and timely backups are the best way to prevent loss of data and to recover from catastrophic failure.

Back up the SalesLogix database on a regular basis. Depending on your database, backups can be performed while the database is in use or during off-peak, low-volume times. Nightly backups are recommended. Refer to your specific database documentation for the various backup methods available.

Always perform backups through your selected database (Microsoft SQL Server or Oracle) rather than through the server or workstation operating system. Since the operating system will not back up a database while it is running, the database must be stopped. Backups through the database, however, are more sophisticated than backups through the operating system and can be performed at the same time as other maintenance functions. Also, point-in-time recovery is much easier from a database backup than from an operating system backup.

Running Other Applications on the SalesLogix Database Server

SalesLogix does not recommend running applications other than the RDBMS and the SalesLogix Server on the SalesLogix database server, except in a SalesLogix Express implementation.

Understanding SalesLogix Hardware

This chapter provides minimum and recommended hardware configurations for each component of a typical SalesLogix installation, and it is designed to help you consider your needs before acquiring hardware.

Administrative Workstation

The Administrative Workstation is usually either the system administrator's personal computer or a separate computer dedicated to SalesLogix administration. The Administrative Workstation hardware configuration may vary based on the following elements:

- Number of accounts in the main database
- Number of other applications running on the Administrative Workstation
- Whether the Administrative Workstation is used for importing data
- Whether the Administrative Workstation hosts the SalesLogix logging folders

RAM significantly improves performance, even under normal conditions, however, it must be increased if:

- Other applications are running on the Administrative Workstation
- The main database has more than 50,000 accounts
- The workstation is used to import large databases

Recommended	Minimum
• 512 MB RAM. • Increase to 1 GB for Architect customization and development.	• 256 MB RAM
• 1 GHz or faster processor (dual)	• 800 MHz processor
• 500 or more MB of free disk space for application files	• 500 or more MB of free disk space for application files

Database Server

Database Server recommendations apply to database servers at both the main office and Remote Office. The minimum and recommended hardware configurations for a Database Server will vary considerably depending upon the anticipated size of your database. After using the information on to calculate the approximate size of your database, consult the documentation from your database vendor (Microsoft SQL Server or Oracle) to determine the appropriate hardware to accommodate your company's database.

The computer that hosts the SalesLogix Database Server is the heart of the SalesLogix system; therefore, its selection and configuration can significantly affect performance. When purchasing a server, you should consider one that is larger and more powerful than your company currently needs so that you are prepared for future requirements.

Also consider a server that is scalable so you can upgrade it with more memory, additional processors, or more disk drives when needed. Switching to a different Database Server after implementation can be difficult and disruptive to your company.

The Database Server can be resource intensive, so you should dedicate the server to SalesLogix if possible. Follow these recommendations:

- Configure the Database Server as a stand-alone server and not a primary or backup domain controller.
- Do not use the Database Server as the primary SalesLogix Administrative Workstation in any installation except Express.
- Do not install the Sync Server on the Database Server unless you are using the Express installation.

Random Access Memory (RAM)

Although each installation is different, you can use the following figures to estimate the amount of memory for a SalesLogix Database Server.

- Allow 256+ megabytes (MB) of RAM for the operating system and another 32+ MB for the MSDE Server (if Remote user databases are created on the server).
- For the RDBMS and the SalesLogix database itself, allow at least 128 MB of RAM. More is better, so increase this number if the database is large.
- Each active user should have 5+ MB of RAM on the SalesLogix Database Server.

SalesLogix Client and Sync Server performance greatly improves when the database is cached in RAM. Use the database Cache Hit Ratio to determine whether the database is being cached in memory. Increase RAM if this percentage is low.

For performance reasons, running any applications other than the SalesLogix Server on the SalesLogix Database Server is not recommended.

Central Processing Unit (CPU)

The number and speed of the CPU(s), or *processors*, depends on the number of active users and the number of accounts in the system. The number of users affects both the volume and the type of transactions issued against the database. The number of accounts affects the processor time required to perform certain operations such as searches and sorting.

Note   Be sure to include the Sync Server and SalesLogix Administrator in the active user count.

The following are CPU recommendations for the SalesLogix Server and Database Server host machine.

If you have	and /or	You need
25 active users	25,000 accounts	450 MHz or higher processor
25 to 100 active users	100,000 accounts	1 GHz or higher processor
Fewer than 100 active users	More than 100,000 accounts	1 GHz or higher processor

Check your database vendor's documentation for recommendations about your company's database. Also, read Chapter 6, "Selecting a Database Management System" before making any database hardware purchases.

Recommended	Minimum
- 1 GB RAM	- 256+ MB RAM
- 1.5 GHz processor (dual)	- 800 MHz processors
- 2 GB+ of free disk space for database	- 2 GB+ of free disk space for database

Recommended	Minimum
• Free space for application files depends on RDBMS (does not include space needed for database)	• Free space for application files depends on RDBMS (does not include space needed for database)

Database Server Size Considerations

The number of accounts and contacts in the database are a factor when determining the size and configuration of the SalesLogix Database Server.

Consider the following when determining the size and configuration of the Database Server:

- Number of accounts in the database
- Number of users who will be accessing the system at one time
- Number of tables and fields added to support any customizations
- Type of database management system

Number of Accounts

The number of accounts affects the amount and type of disk storage needed as well as the table sizes. The database size also affects the amount of RAM since performance greatly improves when all or much of the database is cached in memory. This means that RAM is more important than extra physical disk space when evaluating query performance.

Number of Active Users

The number of active users (the number of users accessing the database at any one time) affects three main areas.

- RAM
- Disk drives
- Processors

RAM Each active user requires a certain amount of RAM on the SalesLogix Database Server to perform functions such as sorting.

Disk Drives A large number of active users making many changes can put a significant load on the SalesLogix Database Server disk drives, requiring more and faster drives.

Processors A large number of active users increase the number of processors required to handle requests without causing undue queuing.

Note Be sure to include the SalesLogix Administrator and Sync Server in your count of active users. Each counts as one active user.

Estimating the Size of Your Database

The size and type of RDBMS affects the amount of RAM and processor resources required on the SalesLogix Database Server. Performance of both Oracle and Microsoft SQL Server improves when more RAM is allocated to the RDBMS and to each user. Oracle requires more CPU resources due to its use of background resources. Another consideration is that the RDBMS may affect the operating system you choose.

SalesLogix Database Models

The size of your database is affected by the number of accounts it contains. Some average size estimates are shown in the following table. (These are average sizes only and assume that not all database fields are in use.)

To estimate the size of your company's database, use the calculation: Number of Accounts multiplied by the Average Record Size plus the Space Occupied by Related Tables in the Database.

You can use the following tables to help determine what your approximate database size should be prior to adding any customizations to SalesLogix. The first table shows the approximate contents of an average database. The second table contains average record sizes for each of the fields. For example, in a company with 25,000 accounts, for each account you can expect to see approximately one opportunity, one contact, two sets of address records (the account address plus the contact address), three products, 50 known defects per product, and so forth. These figures will vary between companies. Also, most companies do not use all available fields. For these reasons, the figures you generate are only estimates. It is strongly recommended that you over-estimate your calculations.

Note The figures in all of the tables in this section were compiled using average record sizes and an uncustomized version of SalesLogix. When estimating the size of your database, use the information in these tables as a guideline only, since actual database size varies depending on the selected RDBMS. Also, each database maintains some system information within itself that may skew these numbers.

Approximate Table Contents

Figures shown are averages and should be used only as a guideline.

	Database A	Database B	Database C
Number of Accounts	25,000	75,000	250,000
Number of Active Users	25	50	100
Opportunities per Account	1	2	3
Contacts per Account	1	2	5
Total Address Records (C+A)	50,000	225,000	1,500,000
Activities per Account	1	2	5
History per Account	25	50	100
Contracts per Account	1.5	3	6
Tickets per Account	1.5	2	3.5
Returns per Account	1.5	2	3
Products	3	6	12
Standard Problem/ Resolution per Product	25	30	45
Defects per Product	50	75	100

Average Record Sizes

Figures shown are averages and should be used only as a guideline. When making your calculations, remember that some fields are static, and some are variable.

SalesLogix file	Average record size (KB)
Account	1.9
Contact	2.5
Opportunity	3
Address	2
Activity	1.5
History	1.5
Account Summary	.5
Contract	1.5
Defect	2
Product	2.5
Returns	1.5
Standard Problem/Resolution	2
Ticket	2.5

Express Installation Host Machine

The following hardware is suggested for the machine serving as host to the SalesLogix Express installation. This machine accommodates all of the SalesLogix components, excluding the SalesLogix Clients. For more information on the components included in an Express Installation, see "Selecting an Installation Type" on page 21.

Recommended	Minimum
• 1 GB of RAM	• 256 MB of RAM
• 1.5 GHz or higher processor (dual)	• 800 MHz processor
• 2 GB or more of free workspace	• 2 GB of free workspace

SalesLogix Client

The following recommendations apply to computers hosting the SalesLogix Client and SalesLogix Client installations at the Remote Office. When planning your client configuration, take into consideration network saturation.

Recommended	Minimum
• 512 MB of RAM	• 256 MB RAM
• 1 GHz or faster processor (dual)	• 800 MHz processor
• 200 or more MB of free disk space for application files	• 200 MB of free disk space for application files

More RAM and CPU resources are required on each client computer, depending on the number of other applications running on the computer, and as the number of accounts in the main database increases.

SalesLogix Remote Client Configuration

The following recommendations apply to computers hosting the SalesLogix Remote Client and SalesLogix Remote Client installations at the Remote Office. When planning your Remote Client configuration, take into consideration network saturation.

Recommended	Minimum
• 512 MB of RAM	• 256 MB RAM
• 1 GHz or faster processor (dual)	• 800 MHz processor
• 200 or more MB of free disk space for application files	• 200 MB of free disk space for application files

More RAM and CPU resources are required on each client computer, depending on the number of other applications running on the computer, and as the number of accounts in the main database increases.

SalesLogix Remote Client

The SalesLogix Remote Client machine must host the Remote user's database and the Sync Client, so a more powerful machine will improve performance. Take into consideration the database size, synchronization method, and modem speed. Database size is determined by the number of records accessed, projected activity, features implemented, and subscription. As the size of the database increases, so does the need for a faster processor and more RAM.

- Increase the RAM on the SalesLogix Remote Client computer if several other applications will be running or if the SalesLogix Remote Client database has more than 5,000 accounts.
- You will require a faster CPU if the number of accounts in the SalesLogix Remote Client database exceeds 5,000.
- Unless SalesLogix Remote Clients are directly connected to a wide-area network (WAN), you must install a Windows modem to synchronize via network/RAS, FTP, or HTTP. Select a modem that gives you the speed and portability you want. Speed is limited when using a modem and phone line to synchronize the databases.
- Allow enough free disk space for the SalesLogix applications, SalesLogix Remote Client database, and the local Sync folder, plus 250 MB of free disk space for database and synchronization files.

Synchronization Client

The load carried by the Sync Client varies depending upon whether it is installed on a Remote Office database server or on a SalesLogix Remote Client machine. Consequently, the hardware requirements also vary.

For FTP synchronization, refer to the Compatibility Checklist on the SalesLogix Support site, which lists supported operating systems.

RAM is the single most important resource for Sync Client when installed at a Remote Office. Increase the amount of RAM for the Remote Office Sync Client based on the number of SalesLogix Network Clients served. For example, if you have more than 50 but less than 100 Network users, increase RAM by 64 MB.

If a single Remote Office is configured to handle more than 100 users, issues with Sync will arise.

- The Remote Office Sync Client CPU varies depending on the number of SalesLogix Clients and the selected operating system. SalesLogix runs significantly better on a 450 MHz or faster processor.
- The Remote Office Sync Client and related applications require approximately 50 MB of disk storage space. However, additional space may be required for processing, so make sure that an average of 200 MB is always free on the Remote Office Sync Client.

SalesLogix Server

If you install the SalesLogix Server on a separate machine, the minimum and recommended hardware configurations are as follows:

Recommended	Minimum
• 1 GB of RAM	• 256 MB of RAM
• 1.5 GHz or faster processor (dual)	• 450 MHz processor
• 2 GB or more of free workspace	• 2 GB of free workspace

You can install the SalesLogix Server and the Synchronization (Sync) Server on the same computer without adjusting hardware.

Note The SalesLogix Server requires the Windows operating system. If you are installing SalesLogix using an Oracle database on a UNIX operating system, you must use a computer with the Windows operating system for the SalesLogix Server.

SpeedSearch Server

Requirements for the SpeedSearch Server depend on the size of your database, except for Express installations. It is strongly recommended that you install SpeedSearch on a dedicated machine with a large hard drive.

Recommended	Minimum
• 1 GB of RAM	• 256 MB RAM
• 1.5 GHz or faster processor (dual)	• 800 MHz processor
• 2 GB or more of free disk space for application files	• 2 GB of free disk space for application files

Installation requires 22 MB. Additional space is required on the hard drive to build indexes of your documents. An index will occupy space roughly one third the size of your original document collection.

Synchronization Server

The primary factor to consider when configuring the Synchronization (Sync) Server is the number of Remote users and Remote Offices. As the number of Remote Offices serviced by the Sync Server increases, the CPU size and amount of RAM must increase also.

With the exception of Express installations, install the Sync Server and SalesLogix Database Server on two separate computers, as the Sync Server and RDBMS both require significant resources. If the Sync Server supports more than five SalesLogix Remote Clients, it may reduce the client performance or even cause the server to stop responding altogether. Depending on your environment, it may be beneficial to divide your processing needs among several Sync Servers to balance the workload.

The minimum and recommended hardware configurations for a Sync Server are as follows:

Recommended	Minimum
• 1 GB of RAM	• 256 MB of RAM
• 800 MHz or faster processor (dual)	• 450 MHz processor
• 2 GB or more of free workspace	• 2 GB of free workspace

Some installations may require multiple Sync Servers. When determining the number of Sync Servers, consider:

- Length of the Sync Server cycle
- Size and number of TEFs (more changes create larger files)
- Type of activity

See "Multiple Sync Servers" on page 57 for more information.

You can install the Sync Service on any computer with access to the Sync Server. The Sync Service does not add to the hardware and software requirements of the machine on which it is installed, but the operating system must be a supported version of Windows.

Disk Storage

The Sync Server and related applications require approximately 50 MB of disk storage space. However, when the Sync Server runs, it uses the following files, which also require space:

- Conflict resolution file (ConfTran.stm)
- WriteCache files

ConfTran.stm

The ConfTran.stm file is a stream file used to resolve conflicts between two users who have made changes to the same information within a given period of time. This period of time is specified in the SalesLogix Administrator along with the rules that govern conflict resolution. It is best to limit this time frame to something relatively small, such as 7 days, since a longer time interval results in a larger ConfTran.stm file, thus reducing Sync Server performance. During the course of a synchronization cycle, all updates processed by the Sync Server are copied to the ConfTran.stm, which may require one to five MB of disk space.

WriteCache files

WriteCache files are used to accommodate the internal process used for writing TEFs. When WriteCache reaches a certain size, it creates a TEF. These temporary files may require as much as 100 MB depending on the number of Remote users supported by the Sync Server.

The following table shows the total space required by the Sync Server when these additional components are taken into consideration. These figures do not include the operating system files.

Sync Server files	Space required
Executable and support files	50 MB
Conflict resolution stream file (ConfTran.stm)	1-5 MB
WriteCache files	20-100 MB
Total space required	71-155 MB

Remote Office Server

Note Remote Office installations do not require an Administrative Workstation, because this function is managed at the main office.

The Remote Office server accommodates the Remote Office database, including the Sync Client and File Server.

Recommended	Minimum
• 1 GB of RAM	• 256 MB of RAM
• 1.5 GHz or faster processor (dual)	• 450 MHz processor
• 2 GB or more of free workspace	• 2 GB of free workspace

Screen Resolution

Most SalesLogix screens were designed for resolutions higher than 640 x 480. For optimum viewing, set the monitor resolution to 1024 x 768.

Additional Installation Considerations

- The SalesLogix Server requires TCP/IP as the network communication protocol. TCP/IP must be installed and configured on every computer running the SalesLogix Administrator, Architect, or SpeedSearch.
- SalesLogix products use a four-digit year regardless of the Windows date format set on each individual computer.
- If the SalesLogix Server is on a different network domain from some or all of the SalesLogix users and components, these domains must have a trust relationship with each other and must be able to share data.

Synchronizing in SalesLogix

If your installation supports Remote users or Remote Offices, changes to all SalesLogix databases must be reconciled. SalesLogix achieves this using *synchronization*.

In SalesLogix, synchronization is basically an exchange of files (containing database changes) between Remote Offices, Remote users, and the main office. This file exchange is possible because all changes made to the Remote and main database are logged in Transaction Exchange Files (TEFs).

SalesLogix synchronizes at the field level; this means that when a specific value is changed, only the field change is sent. The entire record does not have to be sent to the main database or to the Remote Offices and users.

This chapter explains how synchronization works and the available methods for synchronizing.

Synchronization Overview

The illustration in provides an overview of the synchronization process for the main office and Remotes. The term "Remotes" refers to both Remote users and Remote Offices. Remote users connect to their own databases on their own computers (such as a laptop). Remote Offices support Network users who connect to the Remote Office database via a network (a regional office, for example).

The main office, which supports both Network and Remote users, requires the following:

- Main office database
- Central set of synchronization folders (under the shared Sync Logs folder)
- Synchronization Server

Remote users and the Remote Office require the following:

- Subset of the synchronization folders
- Sync Client
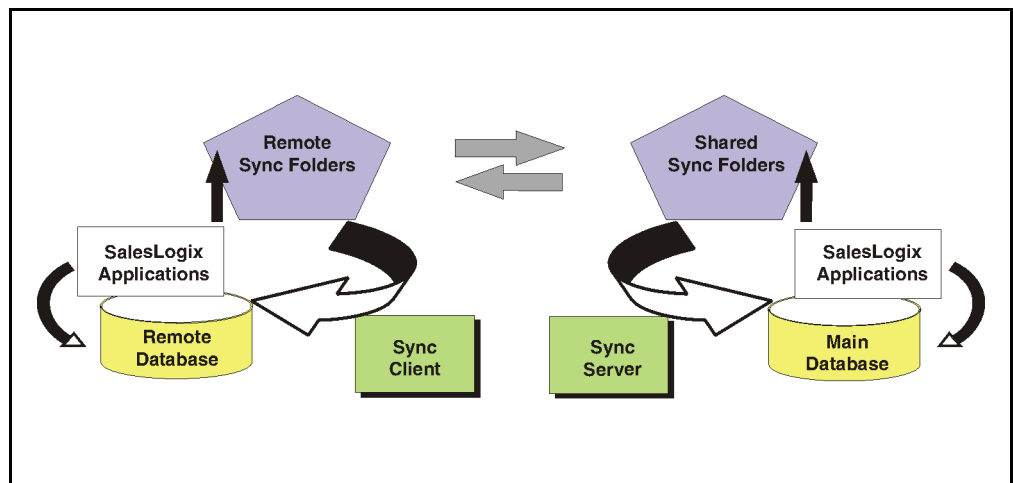
Figure 5 Synchronizing Remote and Main Office Databases

Figure 5 shows how Remote Offices and Remote users use SalesLogix applications (such as the SalesLogix Remote Client) to make changes to the Remote databases. These changes are logged as TEFs in the Remote Sync folders (indicated by the black arrows on the Remote side). SalesLogix applications, such as the SalesLogix Administrator, make changes directly to the main database. These changes are logged as Network Logs (WGLogs) in the shared Sync folders (indicated by the black arrows on the main office side).

The Sync Client on the Remote side then transfers these TEFs to the shared Sync folders at the main office (indicated by the white arrows). The Sync Client is also responsible for moving files waiting in the main office shared Sync folders to the Remote Sync folders. These files are then applied to the Remote database (shown by the grey arrow on the Remote side) so that the Remote database contains the same information as the main database.

In turn, the Sync Server at the main office processes files from the Remote Offices and Remote users and applies them to the main database. It also generates files of these changes for the other Remote Offices and users (indicated by the grey arrow on the main office side). In addition, the Sync Server processes the WGLogs generated by users at the main office and sends them to multiple Remote Offices and users so that all distributed databases eventually contain the same information as the main database.

Site Codes and Synchronization

Each SalesLogix user is assigned a site code. A site code is an alphanumeric code that is unique to every SalesLogix component. Each user (Network, Remote, or administrative), each Remote Office, and each Sync Server has a unique site code in the SalesLogix system. Every SalesLogix database also has a site code.

Site codes enable an individual Remote user to filter their TEFs from the files of other Remote users or a Remote Office. SalesLogix tags all TEFs with the code of the SalesLogix component that will eventually receive and process the file.

When a Remote user generates TEFs with changes to be sent to the main office, those files include the site code of the Sync Server the Remote user is assigned to. In turn, when the Sync Server generates files to be sent to Remote Office and users, it tags the files with the site code of the user that will receive and process the file.

Determining Your Synchronization Method

When developing your synchronization strategy, you must determine how the Remote Office and Remote users are going to send and retrieve transactions. Three synchronization methods, Network Synchronization, FTP, and HTTP are supported in SalesLogix.

Network Synchronization

A dial-up connection, such as Remote Access Server (RAS), enables Remote users to connect to the network from an off-site location. This is the default method of synchronization.

FTP Synchronization

FTP support is built into both the Sync Server and Sync Client. Synchronization by FTP requires that you establish an FTP site on an FTP server. Remote Offices and Remote users upload and download files through the Internet or a TCP/IP network connection using FTP.

When setting up an FTP site for SalesLogix, you must:

- **Create three folders on the FTP server**. For example, /Infiles, /Outfiles, and /FailedTrans. These folders must be shared, and all Remote users and the Sync Server must have read, write, and delete access.

- **Create three virtual directories that point to the /Infiles, /Outfiles, and /FailedTrans folders**. All Remote users, as well as the Sync Server, must have read, write, and delete access to these directories.

> You can also create multiple sets of folders and assign users to them. This process is detailed in the "Improving FTP Synchronization Performance" topic in the Administrator Help.

HTTP Secure Sync

HTTP Synchronization provides a secure method of transferring data using a Web site on an HTTP Server. When the Sync Server cycles, it connects to the HTTP Server and searches the Infiles folder for any TEFs that were uploaded by Remote Offices and Remote users. Likewise, when the Sync Client cycles, it connects to the HTTP Server and searches the Outfiles folder for any TEFs placed there by the main office. All TEFs, library files, and documents are uploaded to and downloaded from the HTTP Server. Internet Information Services is supported, however, any Web Server that supports mapping of folders for uploading and downloading can be used.

Sync Transfer Profiles

In SalesLogix, a single Sync Server can support any combination of synchronization methods. For example, some Remote users may synchronize via the network (RAS), while others use FTP or HTTP.

A Sync Transfer Profile in the SalesLogix Administrator defines each synchronization method and its parameters. You can create multiple Sync Transfer Profiles in SalesLogix based on synchronization processes and number of FTP servers. SalesLogix Remote Client Users must be assigned a Sync Transfer Profile and Sync Server, in order to exchange files with the main office database. If a transfer profile is disabled, synchronization via that method will not occur.

Multiple Sync Servers

Generally, Sync Servers can handle a large number of SalesLogix Remote Client users and/or SalesLogix Client users assigned to a Remote Office. This, of course, depends on the type of activity and the volume of TEFs on the server. The recommended maximum number of users per Sync Server is 100.

All Remote Offices must be connected to the primary Sync Server at the main office. If most Remote users view account activity, but do not create new accounts or contacts, you can assign more users to one Sync Server. However, if the Sync Server activity becomes overloaded, or the synchronization cycle is exceptionally long, you will need to add Sync Servers.

Multiple Sync Servers allow you to distribute the processing load evenly. Your SalesLogix Business Partner can help you determine if multiple Sync Servers are necessary for your implementation.

Folder Structure

To synchronize the main office and Remote databases, all SalesLogix users must have access to a synchronization folder. Consequently, you must create one folder for each Sync Server in the system. In a SalesLogix Remote Client installation, this folder is always called Sync Logs. In a Remote Office installation, you can create your own name for the folder. In this document, it is referred to as RemOfficeSync Logs. The computer on which this folder resides is referred to as the host.

No actual connection exists between the Sync Server and the Remote database. Instead, SalesLogix uses an off-line synchronization process where all communication is accomplished by both the Sync Server and the Sync Client placing files in, and retrieving files from, the shared Sync Logs folder.

The synchronization folder (either Sync Logs or RemOfficeSync Logs) is located on the Sync Server or on a separate file server. The SalesLogix Administrator is used to assign the synchronization folder and Remote Offices and users to a particular Sync Server.

The Documents and Library folders also play a role in synchronization. Sync Server obtains copies of the necessary files in these folders and delivers them to the Remote Offices and users. In turn, files sent from the Remote Offices and users are placed in the shared Library or Documents folders so they can be used by the main office.

Synchronization Folders at the Main Office

The following folder structure is recommended for the synchronization folders:

\\ServerName\Sync Logs (root directory for sync folders and files)

\\ServerName\Documents

\\ServerName\Library

\\ServerName\SyncService (shared folder for the Sync Service)

If you already have a document server, you can use that location for the Documents and Library folders. If the Documents and Library folders cannot be found on the remote computer (user and office) they will be created by SalesLogix. See the Synchronization Server online Help for more information.

You must share the Sync Logs, Documents, and Library folders even if you are not using synchronization. See for more information. See the Windows Help for details on folder sharing.

When deciding where to place the Sync Logs folder, keep in mind that the number of users (especially Remote users) and the use of attachments or the Library dramatically affect the size of this folder. It is important to have enough free disk space on the drive where the Sync Logs folder resides, however, the amount required depends on your company. Some SalesLogix users report the Sync Logs folder as requiring gigabytes.

Main Office Synchronization Sub Folders

The shared Sync Logs folder at the main office contains sub-folders that SalesLogix automatically creates the first time the Sync Server runs. These folders are:

- **Infiles** - Remote users and Remote Offices place their incoming TEFs in this folder when they synchronize with the main office.
- **Outfiles** - All files to be sent to Remote Offices and Remote users are placed in this folder. During synchronization, Remote Offices and users obtain files from this location.

- **WGLogs** - When users at the main office (including the administrator) use various SalesLogix applications to make changes directly on the main database, SalesLogix places transaction files in this folder.

Note All Network users at the main office are assigned to one Sync Server. Only this Sync Server has files in WGLogs to share. Other Sync Servers at the main office only have Remote Offices and Remote users assigned to them and therefore only have Infiles to share.

- **FailedTrans** - This folder contains transactions from both Remote Offices and Remote users, and the host that contain synchronization errors. When a synchronization error occurs, a transaction containing the error and information from the TEF is written to the FailedTrans folder. In addition, errors are also written to the SyncError.txt file.

  You can view the failed transaction files using TrnViewer. All transaction files must be manually deleted from the FailedTrans folder.

- **Archives** - This folder keeps a copy of all files sent to SalesLogix Remote Client users and Remote Offices with the exception of documents and attachments. There is no need to maintain a copy of documents and attachments sent to Remote Offices and Remote users since they already exist in the shared location on the network.

  Archives are deleted once a confirmation is received from the Remote Office that the file was successfully transferred. However, this self-maintenance process only occurs if you configure the Sync Server to "sequence files before apply". See the "Configuring the Synchronization Server" topic in the Administrator Help for more information.

- **SharedLogs** - If you have multiple Sync Servers configured at the main office, this folder contains copies of the Infiles and WGLogs processed by the secondary Sync Servers.

- **Tasks** - This folder is created the first time the Sync Server runs. It is empty until a Remote user or Remote Office uses the Retrieve option under Remote Tasks to transfer a file. The Sync Client converts the file to a TEF, and sends it to the Host (the database from which Remotes were created), where the Sync Server identifies the file as a Task and deposits it in the Tasks folder.

Synchronizing the Main Database

Remote users and Remote Offices synchronize with the main office by sending and receiving TEFs. The Sync Server then updates the main database with these files when it runs at regularly scheduled intervals.

The following steps occur during synchronization via the Sync Server.

1. The Sync Server processes the SalesLogix Network Client and Web Client's WGLogs files and prepares them for sending to Remote Offices and users.
2. TEFs received from Remote Offices and users are applied to the main database.
3. SalesLogix Network Client and SalesLogix Remote Client files are then used to generate files for the Remote Offices and users containing all necessary changes. These files are placed in the Outfiles folder under the Sync Logs folder on the network.

Remote Synchronization

The Sync Client processes synchronization files and ensures that the main database and Remote database(s) contain the same information. Remote users have the Sync Client installed on their computer.

Synchronization Folders and the SalesLogix Remote Client

Each SalesLogix Remote Client installation contains a set of synchronization folders that are used during synchronization. These folders are stored under the SalesLogix Remote Client's Sync folder and are automatically created by SalesLogix.

- **Infiles** - The Sync Client places files received from the main office in this folder when Remote Offices and Remote users synchronize.

- **Outfiles** - All files to be sent to the host are placed in this folder. The Sync Client then moves the files from this location to the main office during synchronization.
- **Archives** - This folder keeps a copy of all files sent to the main office.
- **FailedTrans** - This folder is a temporary holding place for transactions that will be sent to the Host. When a Remote user experiences a synchronization error (for example, a transaction failed to apply), a message flashes stating that Sync Client is sending failed transactions. Once the transactions are sent successfully, they are deleted from the FailedTrans folder on the Remote Office.

  This folder is created in C:\Documents and Settings\All Users\Application Data\SalesLogix\Sync.
- **QUEUEFiles** - Stores transaction queue files generated by the Remote user. These queue files are created with every database commit and typically contain a small amount of data.

Synchronizing SalesLogix Remote Client Databases

The following steps occur when Remote user databases synchronize with the main office:

1. The SalesLogix Remote Client sends TEFs to the Host.
2. The shared Sync Logs folder is accessed on the network at the main office. If the shared Sync Logs folder cannot be located (for security or network reasons), synchronization does not take place.
3. The Sync Client copies the contents of the Outfiles folder on the SalesLogix Remote Client to the shared Sync Logs\Infiles folder at the main office.
4. Files containing the SalesLogix Remote Client's site code are copied by the Sync Client from the shared Sync Logs\Outfiles folder at the main office to the SalesLogix Remote Client's Infiles folder.
5. The Sync Client copies the contents of the FailedTrans folder on the SalesLogix Remote Client to the shared Sync Logs\FailedTrans folder at the main office.
6. The Sync Client updates the Remote database with the Sync Infiles, now on the SalesLogix Remote Client.

Automatic Sync

Automatic Sync—available to SalesLogix Remote Offices and Remote users—starts the synchronization process automatically when it detects that the computer is online and the Sync Logs folder is available. The Sync Client begins the synchronization process in the background, while the user or office continues with other work. Remote users and Remote Offices can suspend Automatic Sync, but must do so each time they log on to their computer. They can also set up an automated synchronization schedule.

Remote Office Synchronization Folders

To synchronize the main office and Remote Office database, you must create a synchronization folder (for example, RemOfficeSync Logs) and it must be accessible to all SalesLogix users at the Remote Office. Typically, the synchronization folder is located on the Remote Office Synchronization Client. This is the best location to place it, but it is not a requirement. You may choose to install the synchronization folder on a separate file server instead.

When deciding where to place the RemOfficeSync Logs folder, keep in mind that it can consume large amounts of disk space. The amount varies depending on the number of accounts in the Remote Office database and the use of attachments or the Library. It is important to have enough free disk space on the drive where the RemOfficeSync Logs folder resides.

Use the following recommended file structure for the synchronization folder, regardless of its location.

\\ServerName\RemOfficeSync Logs (root directory for sync folders and files)

\\ServerName\Documents

\\ServerName\Library

The RemOfficeSync Logs folder must be created and shared to allow access by everyone (including the SLXService user). The Library and Documents folders must also be created and shared on the Sync Client computer or a separate file server at the off-site location. If the Documents and Library folders are not created, SalesLogix automatically creates them under the RemOfficeSync Logs folder during the first synchronization cycle.

The SalesLogix Administrator at the main office is used to specify the location of the RemOfficeSync Logs, Documents, and Library folders and to configure the SalesLogix users attached to the Remote Office.

Remote Office Synchronization Sub-Folders

In a Remote Office installation, SalesLogix automatically creates sub-folders under the shared RemOfficeSync Logs folder. These folders are:

- **Infiles** - TEFs from the main office are placed in this folder when the Remote Office synchronizes. The Remote Office Sync Client then applies these files to the Remote Office database.
- **Archives** - This folder keeps a copy of all files sent to the main office.
- **FailedTrans** - This folder is a temporary holding place for transactions that will be sent to the Host. When a Remote Office experiences a synchronization error (for example, a transaction failed to apply), a message flashes stating that Sync Client is sending failed transactions. Once the transactions are sent successfully, they are deleted from the FailedTrans folder on the Remote Office.

Synchronizing the Remote Office

The following steps occur when Remote Office databases synchronize with the main office:

1. The Remote Office establishes a connection with the main office and accesses the Sync Logs folder. If the Sync Logs folder cannot be located at the main office (for security or network reasons), synchronization does not take place.
2. The Remote Office sends the contents of the RemOfficeSync Logs folder to the main office Sync Logs folder.
3. The Remote Office copies the contents of the WGLogs folder to the Sync Logs\Infiles folder at the main office.
4. Files containing the Remote Office site code in the file extension are copied from the Sync Logs\WGLogs folder at the main office to the Remote Office Infiles folder.
5. The Remote Office copies the contents of the FailedTrans folder to the Sync Logs\FailedTrans folder at the main office.
6. The Remote Office Sync Client updates the Remote Office database with Infiles now at the Remote Office.

Remote Office, Account Ownership, and Security

SalesLogix Client users assigned to a Remote Office own accounts, belong to teams, and have security profiles just like SalesLogix Client users at the main office. Security determines the accounts and other records that the Remote Office should receive; only accounts sent during synchronization are those that SalesLogix users at the Remote Office have permission to access. This includes all accounts owned by teams of which the SalesLogix user is a member. The user does not have to be the team owner for this to occur, but must have access to the account.

Records that a SalesLogix user has access to are sent to the Remote Office during synchronization. It is important to keep this in mind when configuring teams and account ownership for Remote Office users because it is easy to end up with a Remote Office database that contains all the records in the main office database. Poor team and account ownership planning causes the Sync Servers at the main office and the Sync Client(s) at the Remote Office(s) to process large volumes of files. This affects overall system performance.

Scheduling the Sync Server

A synchronization cycle is the time required by the Sync Server to process changes and generate files for remote users. The length of time it takes to complete this cycle varies depending on the amount of information being sent, the method of synchronization, and other network traffic.

Because synchronization can be taxing on the system, SalesLogix recommends that you run synchronization during off-peak times, such as early morning, during lunch, or after normal business hours.

Prior to synchronization, you can specify which operations you want to perform. For example, you can elect to send only changes to Remote Office and users or to apply only TEFs to your database. The following table contains a typical Sync Server schedule.

Scheduled Time	Jobs to Run
Midnight	Sync All
3:00 AM	Back up the Database (automated)
6:00 AM	Sync All
Noon	Updates Only
6:00 PM	Updates Only
9:00 PM	Sync All

To implement this type of schedule, use the SalesLogix Sync Service. The Sync Service enables you to run the Sync Server from Windows as a service and to monitor synchronization jobs remotely using the SalesLogix Monitor Console. Sync server errors are written to the standard Windows Event Viewer. For more information about the SalesLogix Monitor Console see "SalesLogix Utilities" on page 19.

Third-party schedulers, such as WinAT, System Agent, Norton Scheduler, and others, are designed to run with command line options and can also be used to run synchronization. For example, if you are using the Sync Service to run Synchronization Server, the service cannot call any agents that require a third-party application, such as Outlook. The solution may be to create a window of time when the Sync Service does not have a job scheduled, then use a third-party scheduler to run Sync Server with agents during that time. That way, you can run agents that require a third-party application and take advantage of the Sync Service at the same time.

Note   If you plan to install SalesLogix using the Express Installation, you must create a domain user in order to log on and cycle the Sync Server. The Local System account created in the Express does not allow you to run agents.

For more information, see the "Sync Server Command Line Options" topic in the Synchronization Server Help.

Subscription

Note   Subscription only applies to SalesLogix Remote Client Users. It does not apply to SalesLogix Client or Remote Offices.

Subscription is designed for Remote users who must maintain a database on their local computer. It improves performance by allowing Remote users to select or "subscribe" to the accounts they use on a regular basis. Subscription minimizes the database size and the time required to synchronize data by giving each Remote user a subset of the main database. System performance improves when a SalesLogix Remote Client database is limited to approximately 3,000-5,000 accounts.

Subscription is determined at the account level. The system administrator or individual Remote user specifies the accounts to which the user subscribes.

For example, John may have access to 10,000 accounts in the main office database, but only wants to keep a few hundred on his laptop computer (in a Remote database). John can subscribe to only those accounts he wants to keep on his laptop. There are two ways to subscribe to accounts:

- Use subscription rules to request accounts based on specific criteria or conditions.
- As needed, use manual account subscription to select accounts using SalesLogix Remote Client or SalesLogix Administrator.

SalesLogix highly recommends the use of subscription because it improves performance by reducing the size of the Remote user database. SalesLogix also recommends using *subscription rules* rather than manually selecting accounts.

Subscription Rules

Subscription rules specify the criteria for selecting accounts from those the Remote user has access to (based on account ownership). For example, a subscription rule may request accounts for all companies in the state of California with revenues over one million dollars.

Subscription rules are written using the SalesLogix Query Builder. When a subscription rule is written, only accounts that meet the criteria are sent to the Remote user during synchronization. When multiple subscription rules apply to a user (for example, the user has a Team Owner profile, owns accounts as an individual, or has private accounts) all accounts that match each of the rules will be synchronized to the user.

Advantages of Subscription Rules

Subscription rules are dynamic. Once a rule is written and applied to a user, any new accounts that match the rule's conditions are automatically synchronized to the Remote user. As a result, administration time is reduced because no one has to manually select the accounts for synchronization.

Another advantage to subscription rules is that they reduce the number of synchronization cycles it takes for a Remote user to receive a particular account. For instance, when a Remote user manually subscribes to an account, only a request for that account is sent to the main office the first time the Remote user synchronizes. The next time the Sync Server runs, it processes the request and creates a transaction containing the newly subscribed account. When the Remote user synchronizes again, he or she receives the requested account. However, using subscription rules, the Remote user receives the account the first time he or she synchronizes after the account is added to the system.

Subscription and Security

When determining if a Remote user receives an account through synchronization, you should consider two factors:

- Account ownership
- Subscription

SalesLogix security determines which accounts a user has access to, based on account ownership as described in "Understanding Account Ownership" on page 35. Remember that account ownership can be at the individual user level or at the team level, where "everyone" is a special system team.

Then, when security determines which accounts a user can access, some of these accounts are automatically synchronized to the Remote Office and user. This process is called *forced subscription*.

The user has the ability to subscribe to the remaining accounts by using subscription rules.

The following table illustrates how security and account ownership are the foundation for subscription, particularly forced subscription.

If the account owner is…	And the user is…	User is forced to subscribe	User can subscribe
Individual User	The account owner	Yes	N/A
	On the account owner's team	No	Yes
Team	A team member with the "Team Owner" security profile	Yes	N/A
	A team member	No	Yes
Everyone	Any user	No	Yes

Unsubscription Rules

SalesLogix also supports unsubscription rules. These rules specify criteria for removing accounts from a Remote user's local database. However, an unsubscription rule never removes accounts that were synchronized to a user as a result of forced subscription. A Remote user cannot be unsubscribed from accounts where he or she (as an individual) is the account owner.

Customizing SalesLogix

Customizing SalesLogix

SalesLogix is extremely customizable, with many options and tools for customizing both the procedures and the appearance of screens. You can customize SalesLogix to accommodate your company's unique environment and business needs.

It is not necessary to customize SalesLogix with the initial installation. You can customize over time as your company becomes more comfortable with SalesLogix and its components. The standard reports, forms, templates, and other information can be used as the foundation for your customizations. You can also use features included in the evaluation database as models.

When you are ready to customize SalesLogix, use the following table to find information in the online Help systems that are specific to the changes you want to make. Help is available from the Help menu, Help buttons, or by pressing F1 from the application.

Note   The level of customization available depends on your SalesLogix license type. Licenses are described in

What do you want to do?	Help System - Topic Name
Customize SalesLogix Plugins	
Customize the menus and toolbars users see in the SalesLogix Client.	Architect - Menus and Toolbars SalesLogix Client - Customizing Menus and Toolbars
Understand plugins and how they are used to customize SalesLogix.	Architect - What are Plugins?
Understand templates and how you can build new templates or edit existing templates for documents such as letters, memos, or fax cover sheets.	Architect - Templates Overview
Basic Scripts: Write Basic code that can be used by views and reports, executed using agents, tied to menu or toolbar functions, or executed by a task in Processes.	Architect - Basic Scripts
Bundles: Use bundles to package your custom components for easy installation and management.	Administrator Help- What are Bundles Architect Help - Bundles and Bundle a Project
SQL Scripts: Use SQL scripts to build SQL statements that can be used by views and reports, linked with views and objects on views, executed using agents, or tied to menu or toolbar items.	Architect - SQL Scripts
VBScripts: Use VBScripts to write code that can be used by views and reports, linked with forms and form controls, or tied to menu or toolbar items.	Architect - Visual Basic Scripts
Automate SalesLogix Tasks	
Agents: Schedule agents to automatically run reports, Basic scripts, SQL scripts, VBScripts, and so on.	Administrator - What are Agents?

What do you want to do?	Help System - Topic Name
Processes: Create processes to perform repetitive tasks or automate the customer follow-up process.	Architect - What is a Contact Process? Architect - Managing Sales Processes
Make SalesLogix Work for Your Business	
Calculated Fields: Use calculated fields to combine the values of several fields from one or more tables to create a new value.	Administrator - Calculated Fields
Competitors: Keep track of competitors by supplying information such as rating, strengths, weaknesses, strategy, product information, and customer information.	SalesLogix Client - Managing Competitors
Dashboards: Dashboards are tool sets that allow you to display and interact with a variety of performance and analysis information to gain insight into organizational and individual performance.	Dashboards - Dashboards
Groups: Build groups of accounts, contacts, opportunities, or tickets based on complex queries.	Query Builder - Using the SalesLogix Query Builder
Lead Sources: Manage lead sources to record how contacts heard about your company.	SalesLogix Client - Manage Lead Sources
Literature: Manage your company's literature items (for example, by adding new items or editing the quantity on hand).	SalesLogix Client - Manage Literature
Literature: Fulfill literature requests.	SalesLogix Client - Fulfill or Complete a Literature Request
Lookups: Use Lookups to give users different methods to search for accounts, contacts, opportunities, and related data.	Administrator and Architect - Manage Lookups SalesLogix Client - What are Lookups?
Marketing: Capture lead information from a Web page or external list and import into SalesLogix; track lead qualification and convert leads to contacts, accounts, or opportunities; use stages and tasks to design and organize campaigns; and analyze the impact and cost of a marketing campaign.	SalesLogix Client - Introduction to Marketing Services; Managing Campaigns and Campaign Tasks, Qualifying Leads; Adding/Editing/Completing Campaign Stages;
Multi-Currency: Learn more about multi-currency support and the locations of the settings.	Administrator - Understanding Multi-Currency Support SalesLogix Client - Understanding Multi-Currency
Pick Lists: Learn more about using pick lists to simplify data entry.	Administrator - Pick Lists Architect and SalesLogix Client - Pick List Manager
Products: Specify detailed product and pricing information that users can select from when adding opportunities.	SalesLogix Client - Managing Products
Quotas: Manage sales representatives and their quotas.	SalesLogix Client - Managing Quotas
Resources: Manage resources such as conference rooms and equipment.	SalesLogix Client - Manage Resources
Sales Processes: Manage your sales pipeline.	SalesLogix Client - Sales Processes

What do you want to do?	Help System - Topic Name
Work with the SalesLogix Database	
Use the Database Manager to name indexes, or add custom tables and fields to the database.	Administrator and Architect - Database Manager SalesLogix Database Help System
Use the SalesLogix Profiler Tool Kit to trace SQL and performance counters throughout the execution path of the provider for any SalesLogix application.	SalesLogix Profiler - SalesLogix Profiiler Help System

Importing data transfers information from a source database into your SalesLogix database. You can import data into SalesLogix from other contact management systems (such as ACT! by Sage) or from legacy systems maintained by your company. You can also schedule data for automatic import into SalesLogix on a regular basis (weekly or monthly, for example) from other systems.

Before the data transfer can take place, you must map tables and fields in the source database to corresponding tables and fields in the SalesLogix database. You can accomplish this by using one of the following tools:

- The SalesLogix Import Wizard
- A third-party tool or custom application

Any table or field that is not mapped will not be imported.

SalesLogix Import Wizard

The SalesLogix Import Wizard is a utility used for importing data into SalesLogix from ACT! by Sage and other commonly used file formats.

See the Import Wizard Online Help topic "Using the Import Wizard" for detailed Import Wizard instructions.

Importing from ACT! by Sage

Predefined import maps (templates) are available for the following versions of ACT! by Sage:

- Version 3.0.6 and 3.0.7 (single-user or multi-user)
- Version 4.0 (single-user or multi-user)
- Version 5.0 (single-user or multi-user)
- Version 6.0 (use the version 5.0 import map)

Custom Import Maps

If the information you want to import does not have a predefined map, you can create a custom field map using the SalesLogix Import Wizard.

Importing from Common File Types

You can also import data stored in some common database formats (file types) into SalesLogix using the Import Wizard. Supported file types are:

- ASCII (with the exception of tab delimited)
- dBase
- Paradox

Pre-configured SalesLogix import maps are not available for the common file types. You must create a custom import map containing the correct data relationships. This requires a thorough understanding of the SalesLogix database architecture and structure, so we recommend working with your SalesLogix Business Partner or the SalesLogix Professional Services Group when creating a custom import map.

Preparing to Import Data

When importing data into SalesLogix, you map current users to SalesLogix users. For mapping to take place, all users and teams from the source database must exist in the SalesLogix system prior to beginning the import process. Use the SalesLogix Administrator to create new users and teams in the SalesLogix database if needed.

You can also import custom information into SalesLogix. Tables and fields from the source database must have corresponding tables and fields in the SalesLogix database. You may need to add tables and fields to the SalesLogix database.

For example, perhaps you would like to import additional information about contacts (such as their hobbies) into SalesLogix. The default SalesLogix database has no place for this information, so you must create a new table with fields for the additional information and associate it with (join it to) the Contact Table. Use DB Manager in the SalesLogix Administrator or Architect to build this table.

Before any data is imported into SalesLogix, you must know what additional tables and fields are required. This is especially true when using SQL Server or Oracle for the RDBMS because database objects must be sized for best performance.

Routine Data Imports

You can import data from other sources into the SalesLogix database automatically at regularly scheduled intervals without user input. For example, you may want to routinely import mailing lists you have purchased or names from a lead tracking system into SalesLogix. To do this, create a Basic script to import the data, then run it as a SalesLogix agent at the end of the synchronization cycle. You can ask your SalesLogix Business Partner or Professional Services Group representative for more details.

SalesLogix is a 32-bit client/server application that operates most efficiently in a Microsoft Windows 2000 or 2003 environment. This means that communication between the clients and servers take place over a network using standard network protocols.

When preparing your network for SalesLogix, be aware of the following requirements:

*   The network protocol must be TCP/IP.
*   In a mixed Novell/Windows network, you must have support for long file names.

When setting up the network, keep in mind that each SalesLogix Client user must be able to access the Documents, Library, and synchronization folders. The SalesLogix Administrator, Architect, Sync Server, and SalesLogix Client are all reading from, writing to, and changing the contents of these folders throughout the day.

RAS Communication Link

Remote Access Server (RAS) is a communication method that allows users to dial in or dial out of your network. In SalesLogix, RAS is the default method of synchronizing files between the main office and Remote Offices and Remote users.

After the network is installed, make sure that the communication link between the Remote Office and users and the Sync Server folder is secure enough for large quantities of files to be copied.

Networking Operating Systems

In installations where you are networking operating systems, such as Novell with Windows, SalesLogix requires a supported Windows Server. The server may reside on a non-Windows network.

WINS Servers

WINS Server is a dynamic database from Microsoft that is designed to resolve NetBIOS-derived computer name to IP address translation. If you are using Dynamic Host Configuration Protocol (DHCP) on your network, a WINS Server can handle the mapping between computer names and IP addresses. It also maintains a database that is automatically updated as the computer names and IP addresses change.

Note   DHCP and WINS may be required to obtain name resolution successfully in some mixed networks.

WINS servers provide the following benefits:

*   Prevents users from registering duplicate NetBIOS computer names on the network
*   Centralizes administration of the NetBIOS name database and its replication to other WINS servers
*   Reduces IP address broadcast traffic
*   Supports Windows-based clients including Windows 2000 Server and Professional, and LAN Manager version 2.x
*   Depending on the router, has the ability to allow transparent browsing across routers for Windows 2000 Server and Windows 2000 Professional

Using Terminal Server

Microsoft Windows with Terminal Services provides your company with a low cost, "thin client" network solution, with all the benefits of a centrally managed environment. Terminal Server allows a server to host multiple, simultaneous client sessions of SalesLogix or any other Windows-based applications.

Besides the Terminal Server, a Terminal Server Client application is required on each network and Remote user's computer for connection to SalesLogix.

The many advantages of using SalesLogix on a Terminal Server include:

- It centralizes network administration and resources by putting the SalesLogix application on a server rather than on individual desktop and laptop computers.
- It improves SalesLogix maintenance because the system administrator only has to upgrade one server, instead of each user on the network.
- It gives Remote users access to the same data as local users, without the need of administering Sync Servers.

In a Terminal Server implementation, all SalesLogix processing takes place on the server, with only video, mouse, and keyboard traffic passing between the client and Terminal Server. This allows for the use of less robust computers than are normally recommended for client workstations.

For more information on planning and deploying SalesLogix on a Terminal Server, see the Microsoft Web site at www.microsoft.com and Knowledge Base Articles.

Running SalesLogix Applications on Citrix MetaFrame

Citrix MetaFrame is an add-on component to Terminal Server that provides benefits to both the network administrator and SalesLogix users. It extends Terminal Server by providing user access to business-critical applications, regardless of connection, location, or devices. Citrix MetaFrame incorporates the Citrix Independent Computing Architecture (ICA®), an industry standard for server-based computing. Terminal Server supports all types of Windows platforms, including Windows 2000 and Windows XP. Citrix MetaFrame enhances this capability by also supporting non-Windows devices, such as MS-DOS terminals, UNIX workstations, Macintosh computers, Java applications, and others. Users of both Windows and non-Windows platforms obtain a seamless integration with SalesLogix regardless of the user's hardware, operating system, or network connection to the main office.

This is especially true for Remote users who experience Network-like performance when using SalesLogix on a Terminal Server with Citrix MetaFrame. Even in locations where bandwidth is less than optimal and network traffic is heavy, Remote users run significantly faster with MetaFrame. This is because Citrix MetaFrame is designed for low bandwidth connections.

In addition, SalesLogix can be supported and managed from the main office, eliminating the need for remote administration. Even network users can gain performance increases with Citrix MetaFrame.

Another benefit of Citrix MetaFrame is that Remote users have complete access to local system resources. For example, they can print locally, have access to local files and programs, and copy/cut/paste between local and remote applications, preserving rich text format (.rtf). This is all possible even though users are running SalesLogix remotely from the server.

Word Processing and synchronization in SalesLogix will only operate under Citrix MetaFrame if your company is a pure Citrix user. That is to say, all applications are installed on Citrix and none on the client computer.

Note   When running on Citrix, it is highly recommended that you run SLXSystem.exe as a service.

Planning Checklist

This Planning Checklist outlines the tasks you must complete to plan your SalesLogix implementation. These tasks are designed to help you organize and make decisions regarding your implementation.

If you are implementing SalesLogix for the first time, be sure to read each chapter in this guide thoroughly and ensure you have completed the necessary steps.

Task Description	For more information, see...	Actual Finish
1 Determine project requirements.	Page 3	
2 Determine who will perform the Implementation.	Page 4	
Task 2 Details		
Record the following information for each person involved in your implementation: Name: Company: Phone: E-mail: Fax: Role: Responsible for:		
3 Identify your Implementation Manager or System Administrator.	Page 4	
Task 3 Details		
Record the following information for this role: Name: Company: Phone: E-mail: Fax: Role: Responsible for:		
4 Identify your IS Administrator.	Page 5	
Task 4 Details		
Record the following information for this role: Name: Company: Phone: E-mail: Fax: Role: Responsible for:		

Task Description	For more information, see...	Actual Finish
5 For Web installations, identify your Webmaster.	Page 5	
Task 5 Details Record the following information for this role: Name: Company: Phone: E-mail: Fax: Role: Responsible for:		
6 Identify your Database Administrator.	Page 5	
Task 6 Details Record the following information for this role: Name: Company: Phone: E-mail: Fax: Role: Responsible for:		
7 Identify your Customization Developer.	Page 5	
Task 7 Details Record the following information for this role: Name: Company: Phone: E-mail: Fax: Role: Responsible for:		
8 Identify your Review Team.	Page 5	
Task 8 Details Record the following information for each person on this team: Name: Department: Title: Phone: E-mail: Fax:		

Task Description	For more information, see...	Actual Finish
9 Select a Pilot group.		
Task 9 Details Record the following information for each person on this team: Name: Department: Title: Phone: E-mail: Fax:		
10 Set an implementation schedule.		
Task 10 Details Plan for the following phases in your schedule: • Planning • Development • Roll-out • Training • Review		
11 Develop a prototype.		
12 Order and install hardware.		
13 Determine who will provide administrator and end-user training. **Note** When making training decisions, consider where the training will be held.		
14 Understand the total system cost of your SalesLogix implementation and include this information in your planning and budgeting.		
15 Identify the SalesLogix components that you will use in your company.		
Task 15 Details When identifying the appropriate components, you should: • Understand the required core components (page 11). • Select the appropriate Client components (page 13). • If your installation includes Remote Offices and Remote users, select the appropriate remote components (page 15). • If your installation includes the Web, select the appropriate Web components (page 18).		

Task Description	For more information, see...	Actual Finish
16 Select an installation type.	Page 21	
17 Understand the software that SalesLogix supports and identify if any upgrades or changes are necessary.	Page 23	
18 Identify which SalesLogix license(s) you need to purchase.	Page 27	
19 If you have third-party applications that will access your SalesLogix database, determine their security access.	Page 34	
20 Determine what level of account access you want to implement in your company.	Page 35	
Task 20 Details Account access is referred to in SalesLogix as Account Ownership. You can set up ownership using one of three levels: • Individual User • Team • System		
21 Identify the departments you need to create for your company and the users assigned to those departments.	Page 36	
Task 21 Details Record the following information for each department: Department Name: Department Members:		
22 Identify your teams and the team members.	Page 36	
Task 22 Details Record the following information for each team: Team Name: Team Owner: Team Members:		
23 Determine if you need to implement advanced security profiles (field-level security).	Page 37	
24 Determine if users will have access to another user's calendar (calendar security).	Page 37	
Task 24 Details Record which users have access to another user's calendar, the calendars they have access to, and the level of access for each calendar. For example: User: Lee Hogan Calendars that can be accessed: Joan Smith, Tom Dale Level of access: Joan Smith (read-only), Tom Dale (read/write)		

Task Description	For more information, see...	Actual Finish
25 If your installation includes Web components, understand the security differences been SalesLogix Network and Web products.	Page 38	
26 If you are implementing Administrative Roles, identify the roles you need to create and the user assigned to each role.	Page 38	
Task 26 Details Record the following for each administrative role: Administrative Role Name: Functions enabled for this role: User assigned to this role:		
27 Determine if you want your users to log on to SalesLogix using Windows Authentication. **Note** Windows authentication is enabled by default.	Page 39	
28 Determine the RDBMS for your main office.	Page 44	
29 If necessary, determine the RDBMS for your Remote Office(s).	Page 44	
30 If necessary, determine the RDBMS for your Remote users.	Page 44	
31 Plan your database backup schedule.	Page 44	
32 Determine your Database Server hardware configuration.	Page 45	
33 Determine your Administrative Workstation hardware.	Page 45	
34 Estimate the size of your main office database.	Page 47	
35 If you install the SalesLogix Server on a separate machine, determine the appropriate hardware configuration.	Page 49	
36 Determine your Synchronization Server hardware and disk storage space.	Page 49	
37 Determine your SpeedSearch Server hardware.	Page 51	
38 Determine your Remote Office server hardware.	Page 53	
39 Determine your Client hardware.	Page 49	
40 Set the appropriate screen resolution for SalesLogix.	Page 53	
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41 Determine your synchronization method.	Page 56	
42 Determine if your company needs multiple synchronization servers.	Page 57	
43 Determine the location of your main office synchronization folders.	Page 58	

Task Description	For more information, see...	Actual Finish
44 Determine the location of your Remote Office synchronization folders.	Page 60	
45 Identify a synchronization server schedule.	Page 62	
46 Determine how your company will handle subscription for Remote users.	Page 63	
47 Identify the necessary subscription rules for your company.	Page 63	

Glossary

Accounts A company with which there is a current or potential business relationship. Accounts are owned by an individual user, a team of users, or everyone.

Active Users The number of users accessing the database at any one time. The number of active users affects the relational database management system (RDBMS) and server hardware you choose.

Administrative Workstation The primary computer for administering and customizing the SalesLogix system. The SalesLogix Client, SalesLogix Administrator, and Architect are usually installed on this computer. It may also be used to import data into the main database using the Import Wizard.

Agents A method of scheduling reports, running Basic scripts, SQL scripts, etc., at intervals specified in the SalesLogix Administrator and Synchronization Server profile. Agents can be scheduled to run once or on a regular basis.

Archives A folder containing a copy of all files sent to Remote Offices or Remote users, or to the main office during synchronization.

Concurrent Users The number of users able to access the SalesLogix database at any one time.

Contacts The prospects or customers in a company (account). Accounts can contain one or more contacts.

Database Manager Part of the SalesLogix Administrator and Architect that allows you to add, view, and delete tables and fields, as well as name indexes, in the SalesLogix database.

Documents Folder A folder containing files that are attached to an account, contact, or opportunity. For example, a Word letter.

Host A term commonly used for a SalesLogix database that supports both Network and Remote users.

Import Wizard Used to import data into SalesLogix from ACT! by Sage or other commonly used file formats and databases.

Indexes A database index points to records within a SalesLogix table. The index enables users to access information.

Infiles A folder in which the main office, or Remote Offices or Remote users, place Sync files during synchronization.

Join A database operation that connects two database tables having a common field.

Library A central repository for company information. The library may include product information, policies and procedures, presentations, and so on.

Library Folder A folder containing the entire contents of the Library, which is a repository of company information for Network and Remote users.

Monitor Console Enables remote monitoring of the status of processes and jobs running on the Sync Server.

Opportunities Potential sales to accounts or contacts.

Plugins Components that customize and add functionality to SalesLogix. Plugins include processes, views, reports, templates, Basic scripts, and SQL scripts.

Queue Files Queue files are synchronization transaction files that are created with every database commit and typically contain a small amount of data.

Relational Database Management System (RDBMS) An engine and method of managing a database consisting of tables (rows and columns) and the relationships between those tables. SalesLogix supports SQL Server and Oracle databases.

SalesLogix Client An installation of the SalesLogix Client where the user is directly connected to a network database to access and manage customer accounts, contacts, activities, and related information.

SalesLogix License The license that determines the level of core functionality available in your SalesLogix installation. There are three license levels. See "SalesLogix Licenses" on page 27 for more information.

SalesLogix OLE DB Provider A client-side component that handles all database access and applies security.

SalesLogix Server Components that primarily handle logging and licensing for the SalesLogix system. The computer where the components are installed is also referred to as the SalesLogix Server and it may be combined with the SalesLogix Database Server.

SalesLogix Network User An individual who uses the SalesLogix Client software.

SalesLogix Remote Client An installation of the SalesLogix Client where the user keeps a subset of the main database on his or her local computer (a laptop, for example) and uses synchronization to transfer changes between his or her system and the main office. The user can also connect directly to the main office database using a Network/WAN connection.

Security Determines what a user can access in SalesLogix. Security is controlled by a combination of account ownership, management hierarchy, and level of access rights to information.

Security Profile Determines each user's access to tables and fields.

Site Code A unique identification code assigned to each Network user, Remote user, Sync Server, and Remote Office that represents the user or component.

Subscription Allows a Remote user to select or subscribe to accounts used on a regular basis and store the accounts in the Remote user's local database. Subscription rules identify the criteria for selecting accounts.

Synchronization The process of reconciling changes between Remote Offices and Remote users, and Network users. Synchronization can occur through a direct connection (Network/WAN), dial-up connection (network/RAS), FTP, or HTTP.

Synchronization (Sync) Server The application that runs SalesLogix synchronization and agents. It can also refer to the hardware on which the Sync Server application resides.

Sync Logs A folder used for synchronization and other functions.

Team A group of users who have access to the same accounts. Members of the same team may have different security access to data.

Transaction Exchange Files (TEFs) Files that are transferred between Remote Offices and Remote users, and the main office to synchronize data.

WGLogs A folder in which Network users place transaction files as changes are made to the database.

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