Saleslogix Implementation Guide

Version 8.1

Developed by Saleslogix User Assistance

Saleslogix Implementation Guide

Documentation Comments	This documentation was developed by Saleslogix User Assistance. For content revisions, questions, or comments, contact the Saleslogix writers at saleslogix.techpubs@swiftpage.com.
Address	Saleslogix 8800 North Gainey Center Drive, Suite 200 Scottsdale, AZ 85258 USA
Version	Version 8.1 (122013)

Technical Support	Technical Support is available to Saleslogix customers with support contracts directly from Swiftpage, and to Certified Business Partners. Calls are answered during business hours, Monday through Friday, excluding holidays. Partners with a valid technical support contract and a Web access code can request technical support electronically on the Saleslogix Partner Support Portal Web site: www.saleslogix.com/partners. Customers with a valid technical support contract and a Web access code can request technical support electronically on the Saleslogix Customer Support Portal Web site: www.saleslogix.com/customers. Revisions to this book are available through both Portal Web sites. Check regularly for updates to Saleslogix product documentation.

Contents

Introduction

Saleslogix is a leading customer relationship management solution that enables small to medium-sized businesses to acquire, retain, and develop profitable customer relationships through integrated Sales, Marketing, Customer Service, Accounting Integration, and Support automation solutions.

About This Guide

This is the *Saleslogix Implementation Guide*. It provides step-by-step instructions for installing Saleslogix version 8.1. This guide is written for system administrators, Webmasters, and information system professionals.

Installing Saleslogix 8.1 provides a full version of the product.

- If you have never installed Saleslogix, follow the steps in this guide.
- If you are upgrading from Saleslogix version 7.5.4 or 8.0 or later, refer to the guide called *Upgrading to Saleslogix v8.1.PDF*.

If you are upgrading from a version of Saleslogix prior to version 7.5.4, use the appropriate upgrade documents to first upgrade to version 7.5.4 or later before upgrading to version 8.1. These documents are available from the Support Portal Web sites:

- Saleslogix Partner Support Portal Web site: www.saleslogix.com//partners.
- Saleslogix Customer Support Portal Web site: www.saleslogix.com//customers.

Choosing Components for Your Implementation

Saleslogix is a feature-rich product with multiple possible installation scenarios. You can choose your core installation option (Express or Standard), and then install the Saleslogix Clients and peripherals based on the needs of your organization. The following table provides an overview. See the *Saleslogix Planning Guide* for more information about available Saleslogix Components.

Component	Available Options
Core components	
Choose one of two installation options.	• Express • Standard
Clients	
You can install any combination of Saleslogix Clients.	• Windows (LAN) • Web • Mobile
Remotes	
Remotes are installations where users have a subset of the Saleslogix database located locally.	• Offline Web Client • Remote Office • Remote Users
Synchronization	
Synchronization enables exchange of data between databases. It is only required if your implementation includes Remotes.	• Offline Web Client • Remote Office • Remote User

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

What You Need to Know

The *Saleslogix Implementation Guide* assumes you have a working knowledge of Microsoft Windows operating systems, Microsoft Windows server technology and security, Microsoft Internet Information Services (IIS) Manager, and Web technology. You should also understand the client/server computing environment, especially networking strategies for network and remote users.

You should be familiar with your database platform and its operation and administration. Depending on the selected database platform, a Database Administrator (DBA) may be required for database tuning, maintenance, and customizations.

Planning Your Implementation

The most important element of a successful implementation is planning. The *Saleslogix Planning Guide* helps you plan your implementation process, from developing an implementation schedule to rolling out the system. The *Saleslogix Planning Guide* helps you:

- Determine who will perform the implementation and select your implementation team.
- Understand the product components and their purpose.
- Determine a method for synchronizing data between the main office and remotes (if applicable).
- You can obtain a copy of the *Saleslogix Planning Guide* from your Business Partner, from a Professional Services Group (PSG) representative, or from a Saleslogix Support Portal web site:
  - Saleslogix Partner Support Portal Web site: www.saleslogix.com/.
  - Saleslogix Customer Support Portal Web site: www.saleslogix.com/.

Related Documentation

In addition to the *Saleslogix Implementation Guide*, you may find the following documentation helpful.

- The *Saleslogix Planning Guide* provides installation and database recommendations, and guidelines to help you plan for a successful implementation. It is available on the Support portal web sites.
- The *Compatibility Checklist* lists minimum and recommended hardware and the software qualified and supported for each version of Saleslogix. It is available on the Support Portal Web sites.
- The *Saleslogix LAN Developers Reference* provides VBScript, COM, and SQL functions you can use to customize the Saleslogix Windows (LAN) Client to meet your specific needs. It is available from the Support portal web sites.
- The *Saleslogix Developer Tips* online Help contains information for developers, Webmasters, and IS professionals who are customizing the Saleslogix Web Client or creating custom Web applications. This help file contains conceptual overviews, customization scenarios, code samples, and references to help you develop your Web applications. The Developer Tips Help is available from the Application Architect.
- Online Help is available in each Saleslogix application.

Partners and Customers with a valid technical support contract can access the additional resources and documentation available on the Support Portal Web sites:

- Saleslogix Partner Support Portal Web site: www.saleslogix.com/Partners.
- Saleslogix Customer Support Portal Web site: www.saleslogix.com/Customers.

Chapter 1 | Implementation Checklist

This chapter outlines the tasks you must complete to implement Saleslogix. These tasks are designed to help you organize and make decisions regarding your Saleslogix implementation. Any tasks that are recommended, but not required, are designated as Optional.

If you are implementing Saleslogix for the first time, read each chapter thoroughly to ensure you have correctly completed the necessary steps.

If you are upgrading from a previous version, do not use this document. Refer to the appropriate Upgrading document located in the Documentation folder.

Required Tasks

All implementations require the following tasks.

✓	Task	Page	Computer
	1. Read the *Saleslogix Planning Guide* and create an implementation plan.		
	2. Set security and access for the WebDLL and SLXService users.	12	Administrative Workstation
	3. Install and configure your system prerequisites.	14	All computers and servers
	4. Create and share the logging folders. You do not need to create the folders in an Express Installation.	20	Synchronization Server
	5. For Oracle installations, create your Saleslogix database. **Note** You must run the CreateOracleViews.sql script on your database before you can log into any Saleslogix products. For Microsoft SQL Server, the database is created during the installation.	115	Database Server
	6. Install the Saleslogix Server components.	26	All computers and servers
	7. Create Server database connections (if necessary).	29	Saleslogix Server
	8. For Oracle installations, create the Net Service Name and Client database connection.	31	Administrative Workstation
	9. For 64-bit systems, create a 32-bit OLE DB UDL.	32	Administrative Workstation
	10. Add the appropriate Saleslogix licenses.	34	Administrative Workstation
	11. Enter your main office information.	34	Administrative Workstation
	12. Configure options.	34	Administrative Workstation
	13. Understand e-mail integration options.	37	
	14. Add office information for customer service and support. This task applies if your installation uses customer service or support features.	39	Administrative Workstation

✓	Task	Page	Computer
	15. Add new users and configure user profiles.	54	Administrative Workstation
	16. Set user access to Customer Service Management. This task applies if your installation uses customer service or support features.	55	Administrative Workstation
	17. (Optional) Create automated installations for the Saleslogix Network Client.	59	Administrative Workstation
	18. Install the Saleslogix Network Client on all Saleslogix user's computers.	60	Saleslogix Client computers
	19. For Oracle installations, create a Net Service Name and Client database connection.	31	Saleslogix Client computers
	20. Start the Saleslogix Network Client.	61	Saleslogix Client computers
	21. Create Area, Category, and Issue lists. This task applies if your installation uses customer service or support features.	61	Saleslogix Client computer
	22. Create the SyncSalesLogix group. This task applies if your installation includes Outlook Integration.	62 and 72	Saleslogix Client and Web Client computers

Web Tasks

In addition to the "Required Tasks" on page 3, implementations that include Web components require the following tasks.

✓	Task	Page	Computer
	1. Install the Web Host.	41	Web Host server
	2. Build the Web platform.	42	Administrative Workstation
	3. Deploy the Saleslogix Client portal.	43	Administrative Workstation
	4. Configure the SData portal.	45	Web Host server
	5. Configure IIS performance settings.	46	Web Host server
	6. Enable HTTP Compression.	47	Web Host server
	7. Configure ASP.NET.	49	Web Host server
	8. Configure Application Pool permissions.	49	Web Host server
	9. Configure permissions for Desktop Integration.	50	Web Host server
	10. Define the default document.	50	IIS Server
	11. Configure Windows Authentication.	65	Administrative Workstation
	12. Change the user assigned to the Job Service. This task is required for the Saleslogix Web Client but may also apply to LAN Client installations that will include custom jobs for long-running or resource-intensive tasks.	45	Web Host server
	13. Configure roles.	69	Web Client computer
	14. Test the Web site.	70	Web Host server
	15. Create a link from your company's Web site (intranet).	70	Company intranet server

✓	Task	Page	Computer
	16. Configure Web Client user computers.	71	Web Client computers
	17. (Optional) Configure Accounting Integration.	119	Administrative Workstation and Web Client computers

Mobile Client Tasks

In addition to the “Web Tasks” on page 4, implementations that include the Mobile Client require the following tasks.

✓	Task	Page	Computer
	1. Deploy the Saleslogix Mobile Client portal.	75	Administrative Workstation
	2. Define the default document.	75	IIS Server
	3. Test the Web site.	75	Web Host
	4. Send the Saleslogix Mobile Client portal URL to users.	76	Administrative Workstation

Saleslogix Customer Portal Tasks

In addition to the “Web Tasks” on page 4, implementations that include Saleslogix Customer Portal require the following tasks.

✓	Task	Page	Computer
	1. Add the Saleslogix Customer Portal User.	80	Administrative Workstation
	2. Set user security.	80	Administrative Workstation
	3. Deploy the Saleslogix Customer Portal.	80	Administrative Workstation
	4. Configure the SpeedSearch Indexes access setting for Public Access (if necessary).	81	Administrative Workstation
	5. (Optional) Enable employees to grant access to Saleslogix Customer Portal.	81	Web Host
	6. Test the Web site(s).	82	Web Host
	7. Create a link from your company’s Web site (intranet).	82	Company internet or intranet server
	8. Configure Saleslogix Customer Portal user computers.	82	Saleslogix Customer Portal computers

Synchronization Tasks

In addition to the “Required Tasks” on page 3, the following tasks are required for all implementations that include Remote users or Remote Offices. If your implementation does not include Remotes, the following do not apply.

✓	Task	Page	Computer
	1. Configure synchronization transfer profiles for your selected method of synchronization.	85	Administrative Workstation
	2. Start the Synchronization Server.	92	Synchronization Server

Remote User Tasks

In addition to the “Required Tasks” on page 3 the following tasks are required for all implementations that include Remote users. Remote users can access their local database using the Saleslogix Remote Client or Offline Web Client.

✓	Task	Page	Computer
	1. Set synchronization options and assign a synchronization transfer profile to each Remote user.	95	Administrative Workstation
	2. Create Remote user databases.	97	Administrative Workstation
	3. Deploy the Web site to all Offline Web Clients.	109	Administrative Workstation
	4. Install the Saleslogix Remote Client and/or Offline Web Client.	97 and 111	Remote user computers
	5. Install the Remote user database.	98 and 111	Remote user computers
	6. Run a synchronization cycle on all Offline Web Client computers.	111	Remote user computers
	7. Start the Saleslogix Remote Client and/or Web Client.	99 and 111	Remote user computers
	8. Instruct Offline Web Client users to download the Desktop Integration Module.	112	Remote user computers

Remote Office Tasks

In addition to the “Required Tasks” on page 3, implementations that include Remote Offices require the following tasks.

✓	Task	Page	Computer
	1. Configure the Remote Office profile.	101	Administrative Workstation
	2. Add users to the Remote Office.	102	Administrative Workstation
	3. Create the Remote Office database.	102	Administrative Workstation
	4. Install the Web Host at the Remote Office	103	Remote Office computer
	5. Install the Remote Office.	103	Remote Office computer
	6. Install the Remote Office database.	104	Remote Office Database Server
	7. Deploy Web Portals for the Remote Office.	105	Administrative Workstation
	8. Start the Remote Office Sync Client.	106	Remote Office computer
	9. Install the Remote Office Clients and/or Web Clients.	106	Saleslogix Client computers

Outlook Sync Tasks

In addition to the “Required Tasks” on page 3, the following tasks are required for all implementations that include Outlook Sync.

✓	Task	Page	Computer
	1. Create and assign the SyncSalesLogix group. This task applies if your installation includes Outlook Integration or Outlook Sync.	62 and 72	Saleslogix Client and Web Client computers
	2. If your installation includes the Network Client but not any Web or Mobile Clients, Install the Web Host. Open the Application Architect and build and deploy the SLXClient and SData portals.	41	Web Host server
	3. If your installation includes **Remote Office**: Deploy the SData portal along with the SLXClient portal. The SData portal is part of the Core Portals deployment.	105	Administrative Workstation
	4. If your installation includes **Offline Web Client**: Deploy the SData portal along with the SLXClient portal. The SData portal is part of the Core Portals deployment.	109	Administrative Workstation
	If your installation includes **Windows Remote Client**: no extra actions required. The SData portal is deployed as part of the LAN Remote Client install.		
	5. Activate Outlook Sync.	50	Saleslogix Web Admin
	6. After installing the Saleslogix Clients: • Direct Saleslogix Network Client users to open Microsoft Outlook and configure Outlook Sync using the Saleslogix Outlook Connector. • Direct Saleslogix Web Client users to download Desktop Integration. See the Web Client help topic called *Installing and Using Saleslogix Desktop Integration.*	123	Saleslogix Client and Web Client computers

Optional Tasks

After completing the previous tasks, you can begin using Saleslogix. However, you may want to learn more about the following features to further customize your implementation.

Conflict Resolution You can define the criteria to use during synchronization to determine what changes are kept when more than one user has changed data. Conflict resolution is only necessary if your implementation includes Remotes. See the “Conflict Resolution” topic in the Administrator Help for more information.

Multi-currency If your company has users in multiple countries using different currencies, you can enable multi-currency support. See the “Managing Currency” topic in the Administrator Help for more information.

Monitor Console The Monitor Console receives and displays information from the Synchronization (Sync) Service. This enables remote monitoring of the status of processes and jobs running on the Sync Server. See the Monitor Console Help for more information.

Sales Processes Sales Processes are groups of steps and procedures that help users manage their Sales pipeline. A sales process shows users the steps to complete while working to make the sale. Processes can also prompt the user to complete activities, such as making phone calls and writing letters. For information on creating and managing Sales Processes, see the “Managing Sales Processes” topic in the Architect or Saleslogix Client Help.

Teams After adding and configuring users, you can create teams containing the users who require access to the same set of accounts. Teams customarily reflect the structure of your company, such as corporate regions, sales territories, or departments. See the “Working with Teams” topic in the Administrator Help for more information.

Part I
Administration Tools and Servers

Chapter 2 | Preparing Your Environment

Before installing Saleslogix, review and address the system prerequisites outlined in this chapter. This will minimize delays and enable your implementation to be successful.

Before You Begin

Review the available documentation:

- *Saleslogix Planning Guide*. Read this manual to help plan your entire implementation.
- *Compatibility Guide*. Use this document along with the requirements outlined in this chapter to ensure your hardware and software meet Saleslogix supported versions.

General Requirements

The requirements listed here apply to all Saleslogix installations.

User Rights and Network Permissions

You must have Administrator rights for the computer on which you are installing Saleslogix components. See your Microsoft documentation for instructions on granting administrator rights using one of the following options:

- Add each user to the local machine's Admin group for the duration of the implementation.
- Use a domain user account that is a member of the domain admin group for the duration of the implementation.
- You do not need administrator rights to run the Saleslogix Client, Saleslogix Web Client, Sync Client, or Mail Client.

The Offline Web Client installation does not require administrator rights if all prerequisites are installed prior to installing the Offline Web Client.

- .TCP/IP must be installed and configured on every computer running Saleslogix. TCP/IP is required as the network communication protocol.
- No debuggers, programs, or screen savers running. Close all programs and turn off all debuggers, screen savers, or anti-virus programs that may interfere with the installation.

Understanding Commonly-Used User Types

The instructions in this document reference several default users and user types. This section explains these users and provides instructions for creating them where necessary.

- **Local System Account:** This default Microsoft Windows account includes the privileges necessary for Saleslogix services. The Local System user has full rights on the local computer, but not domain access. This user must be mapped to a Saleslogix user, usually the Admin user.

If you plan to run Agents, the Local System Account cannot be used to log on and cycle the Sync Server the first time. You must use a Domain account to log on and run a manual synchronization cycle for Agents to work correctly.

- **SLXService User:** Create this user if you have modified the default settings for the Local System Account or prefer to specify a different user. See "Permissions Required for the SLXService User (without Administrator rights)" on page 12 for more information. Although named "SLXService User" in this document, you may give this user any unique name.
- **WebDLL User:** Create this domain user if your installation includes Web components. See "The WebDLL User" on page 13 for more information. This user is usually mapped to the Saleslogix Admin user. Although named "WebDLL User" in this document, you may give this user any unique name.
- **Admin User:** This is a Saleslogix user and has full permissions to the Saleslogix product and database. It must be mapped to a user such as the Local System Account, SLXService User or WebDLL User.
- **Named User (Network or Remote):** This is a Saleslogix user. Each license enables a single named user to access any number of copies of any Web, Remote, Mobile, or Saleslogix Network Client software. One license is assigned per user for each named user.

See the *SaleslogixPlanning Guide* for more information about the user types available in Saleslogix.

Permissions Required for the SLXService User (without Administrator rights)

If you choose to create the SLXService User, you must assign the following required permissions. These permissions apply to Windows XP/2003/2008/2012. You must log on as a user with Administrative rights to configure permissions.

To create the SLXService user

1. Log on as a user with Administrative rights.
2. Set "Access this computer from the Network", "Allow log on locally", and "Log on as a service" rights on the Saleslogix Server, SpeedSearch Server, and Sync Server computers.
3. Give the SLXService user **Full** control to the following registry key,
   - Sync Service
     - HKLM\Software\SalesLogix
   - SLXService User
     - HKLM \SYSTEM\CurrentControlSet\Services\Eventlog
     - HKLM\Software\Description\Microsoft\Rpc\UuidTemporaryData
4. Grant the SLXService user security rights to the following directory and file locations:
   - DBEventing Service
     - C:\Windows\Debug\ (Full control)
   - Sync Service and Sync Servers
     - Logging path for each Sync Server (Full control)
     - Library folder (Full control)
     - Documents folder (Full control)
     - Sync Service folder (Full control)
     - Remote Office Sync Logs folder (Full control for Everyone accessing the Remote Office)
     - Remote Office Documents folder (Full control)
     - Remote Office Library folder (Full control)
     - If an alternate location is used for the log files created, then this path must also be enabled for modify (read/write) access.
   - SpeedSearch Service
     - C:\Program Files\Saleslogix\Speedsearch (Full Control)
   - Microsoft SQL Express
     - Program Files\Microsoft SQL Server\instance name\Data

       The Windows user for the Saleslogix Remote Client must be given this access. Access is only required for Remote users with a Microsoft SQL Express database.

The WebDLL User

If your installation includes Web components or the Saleslogix Job Server, you must create the WebDLL user. This user is a valid network logon name with security permissions that allow the Web Host and the Saleslogix Job Service to access all necessary directories.

The WebDLL user has certain minimum security settings required to run the Web components on Microsoft Windows. The exact settings depend on the requirements of your company. The minimum requirements are detailed in this section.

- Individual Saleslogix users do not require any Windows permissions to be set to use the Web Client. All required access comes from the permissions granted to the WebDLL user. Because the IIS default user, IUSR_<machinename>, is created locally, you should create a new user.

  Note For information on creating users, modifying user groups, and assigning folder permissions, refer to the Microsoft Windows online Help.

Use the following settings to create the WebDLL user without Administrator rights on the Web Host. You must log on as a user with Administrative rights to configure permissions.

To create

1. Create the WebDLL User in your company's domain where all servers involved in the implementation are located. Since you must be a domain administrator to do this, typically an IT department creates the user.
   a. For the User name, type **WebDLL**.
      Do not use spaces.
   b. Set password options to:
      - **Password never expires**.
      - **User cannot change password**.
      - If selected by default, *clear* **User must change password at next logon**.
2. Add the WebDLL user to the following user group:
   - For Microsoft Windows 2003: IIS_WPG
   - For Microsoft Windows 2008: IIS_IUSRS
3. Set **Full** permissions to the following registry locations:
   - Service User (WebDLL)
     - HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Tracing
     - HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Eventlog
4. Set **Read Only** access to the following registry location:
   - HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\SystemCertificate\Disallowed
5. Set **Read/Write** access to the following locations:
   - Needed for Saleslogix:
     - C:\Windows\Temp folder
     - C:\Windows\SysWOW64\config\systemprofile\" (2012, 2008 R2) (64 bit).
6. For Windows 2012, set **Full** access to the following location:
   - C:\ProgramData\SalesLogix\Profiler\SalesLogix.Profiler.SLXPROFILERINFO.tmp.
7. Grant access to the IIS metabase and other directories used by ASP.NET.
   a. Open a CMD prompt and navigate to C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727
   b. Type: **aspnet_regiis -ga domainname\username**
   c. Press **Enter**.
      The following messages will appear.
      "Start granting slxapp access to the IIS metabase and other directories used by ASP.NET."
      "Finished granting slxapp access to the IIS metabase and other directories used by ASP.NET."

Software Requirements

- Latest supported Windows Service Pack. Install the latest supported service pack for your Windows platform, available from Microsoft at www.microsoft.com.
- MDAC (Microsoft Windows versions earlier than Vista) or Windows DAC (Microsoft Windows Vista or Windows 7). Microsoft Data Access Components are required on every computer running Saleslogix.

  If your Database Server contains only the Saleslogix database and no other Saleslogix components, you do not need to install MDAC/Windows DAC on that server.
- Microsoft SQL Express installed on the Administrative Workstation. Microsoft SQL Express is required if you have an Oracle database and there will be Remote users or Remote Offices created, if your remote databases are a different Microsoft SQL Server version than the host, or if the Resync utility will be used.

  If Microsoft SQL Express is installed with Saleslogix, it installs as a SALESLOGIX instance with the sa password set to SLXMa$t3r. If you install Microsoft SQL Express from another source, you must set the sa password to SLXMa$t3r (it is generally blank). To install Microsoft SQL Express with the same configuration settings as Saleslogix, create a setup.ini file in the SQLExpress install folder with the following information. When creating the file, copy the Redist\SQLExpress folder from the Saleslogix media to your local machine (for example, C:\SQLExpress).

  [OPTIONS]

  ADDLOCAL=SQL_Engine

  INSTANCENAME=SALESLOGIX (The INSTANCENAME can be any name you want. Saleslogix defaults the INSTANCENAME as SALESLOGIX.)

  SAPWD=SLXMa$t3r

  SECURITYMODE=SQL

  Run the setup of SQL Express using a command line. At the command prompt, change the location of SQL Express using the following command: setup.exe /qb /settings “location\of\setup.ini” (change "location\of\setup.ini" to the full path to the file, for example, c:\sqlexpress\setup.ini).
- Microsoft SQL Server 2005 Native Client. For Microsoft SQL Server 2005, the Microsoft SQL Native Client must be installed on every computer that will connect to a Saleslogix database.
- Microsoft SQL Server 2008 R2 and 2012 Native Providers. For Microsoft SQL Server 2008 R2 and 2012, the Microsoft SQL Server Native Providers must be installed on every computer that will connect to a Saleslogix database.
- Microsoft Windows Installer. Windows Installer is required for use with .NET Framework. The Saleslogix installation automatically installs .NET Framework if it is not detected on the computer where you are installing Saleslogix.
- Microsoft .NET Framework with ASP.NET enabled. .NET Framework with ASP.NET enabled is required for .NET Extensions on the Administrative Workstation, Web Host, and Saleslogix Client computers.

  Ensure you install IIS before you install Microsoft.NET Framework; otherwise, ASP.NET is not installed.
- Microsoft Collaboration Data Objects. If you plan to run agents with e-mail output, you must install the Collaboration Data Objects (CDO.dll) on your Sync Server.
  - For Outlook 2007, download Collaboration Data Objects version 1.2.1 from the Microsoft Web site at www.microsoft.com.
  - For Outlook 2010, most of the functionality has been incorporated into the Outlook 2010 object model.
- Microsoft Internet Explorer or Firefox. You must install a supported browser on every computer running Saleslogix. Microsoft Internet Explorer 8 and 9 must be running in Native mode.
- Microsoft Word. You must install Word on the Administrative Workstation (or the computer on which you install Architect) for template management and on each Saleslogix Client and Web Client computer for mail merge.
- SAP Crystal Reports. If you plan to create or edit the Sample reports, you must install Crystal Reports on the Administrative Workstation (or the computer on which you install Architect) for report management. The Crystal Reports installation is available with Saleslogix.
- Adobe Acrobat Reader. Required to view Saleslogix documentation.

- The following table shows the software prerequisites that will be installed if they are not detected during the Saleslogix installation. Installing these prerequisites may require your computer to restart.

Prerequisites	Admin Tools and Servers	LAN Client	Remote Office	Remote Client	Offline Web Client	Web Host
Windows Installer 3.1		X				X
Windows Installer 4.5	X		X	X	X	
Microsoft Exception Message Box	X		X	X		
Microsoft .NET Framework 4.5.1[2]	X	X	X	X	X	X
Microsoft .NET Framework Multi-Targeting Pack	X		X	X	X	X
SQL Server 2005 Backward Compatibility	X		X	X	X	X
Microsoft SQL Server 2008 R2 Express RTM (Optional)	X		X	X	X	
PowerShell 1.0 for Windows Server 2003 (x86)	X		X	X	X	
Microsoft Windows Imaging Component	X		X	X	X	X
Microsoft Visual C++ 2010 x86 Redistributable	X	X			X	X

Note

- When the operating system is Windows 2003 Server 64-bit, SP2, .Net 2.0, and 3.5.1 must already be installed to enable Saleslogix to install the .Net 4.0 and SQL 2005 Backwards Compatibility prerequisites. You can find these versions of .Net on the Saleslogix DVD, in the Redist folder.
- [1] Microsoft .NET Framework v2.0 is installed in Classic mode.
- [2] Microsoft .NET Framework v4.5.1 is installed in Integrated model.

Web Requirements

- Internet Information Services (IIS). IIS 6 Compatibility. If you are running Saleslogix on Windows 2008 Server or Windows 2012, enable IIS 6 Compatibility on the Web Host.
  - To enable compatibility, open Server Manager, expand Roles, right click Web Server (IIS) and select Add Role Services. In the Select Role Services list under Management Tools, select IIS 6 Management Compatibility. The following sub-items are automatically selected: IIS 6 Metabase Compatibility, IIS 6 WMI Compatibility, IIS 6 Scripting Tools, and IIS 6 Management Console.
- Firewalls disabled on the Web Host (Windows 2008 Server). Firewalls can be active if a rule is added to allow inbound from ports 1433, 1025, and your Saleslogix Web site port.
- Windows Firewall port 11211. Open Windows Firewall and add an exclusion for port 11211. The Saleslogix Cache Server requires access to this port.
- .Net version 4.5.1 must be installed on the machine that hosts the Saleslogix Web Host when the Web Host uses the following operating systems:
  - Microsoft Windows 2012 and 64 bit: .NET version 4.5.1 must be installed in Server Manager.
  - Microsoft Windows 2008 R2 32 and 64 bit: .NET version 4.5.1 must be installed in Server Manager.
  - Microsoft Windows 7: .NET version 4.5.1 must be installed in Programs and Features.

- Microsoft Windows 2003 32 and 64 bit: .NET version 3.5.1 must be installed in Programs and Features.

Note

- The Web Host installation automatically sets up IIS configuration. If you prefer to manually set up your web site instead of using the Web Host install, see the steps for configuring IIS before continuing with the installation.

SData Portal Requirements

- SData provides a standard protocol for reading data from and writing data to business applications, either on-premises (server or desktop based) or on the Web.

Note

If your implementation includes Windows Authentication, Saleslogix Job Service, and/or Saleslogix Mobile, but not the Saleslogix Web components, you must still create the WebDLL user, install the Web Host, and configure the SData portal. See page 45 for instructions.

The SData portal requires the following:

- On the Visual Studio development Web server, assign your domain user to a Saleslogix user, as the development server runs under the current logged in user.
- Internet Explorer version 7 or later. Earlier Internet Explorer versions do not have ATOM/RSS support.
- The default authentication model for the SData Portal is Basic Authentication which:
  - Does not require an association between the WebDLL user and a Saleslogix user.
  - Is used with Secure Sockets Layer (SSL).
  - Is required for Saleslogix Mobile and Offline Web Client, and Desktop Integration functionality.

Process Orchestration Server Requirements

Process Orchestration allows you to create a process to be associated with any entity in Saleslogix. Any entity can be associated to multiple processes. Process Orchestration requires the Process Orchestration Host which executes/monitors the process instances in the Web Client. The Process Orchestration Host is installed with the Web Host.

- Windows 2003 Server or later required for .NET Framework.
- .NET Framework 4.0 or later. The Process Orchestration Server will not run using .NET Framework versions earlier than 4.0.
- Disable IIS Integrated Windows Authentication for the ProcessHost Web site.
- A Saleslogix user must be associated with the same Windows user that is assigned to the application pool for Process Orchestration. Typically, this is the Saleslogix admin user.
- For steps to associate a Saleslogix user to a Windows user, see “Configuring the WebDLL User for Windows Authentication” on page 65r.

Note

If your implementation does not include the Web, you must still create the WebDLL user, install the Web Host, and configure Application Pool permissions for the process orchestration portal (see page 41 for instructions). Then refer to the “Implementing Process Orchestration” topic in the Application Architect Help for additional implementation steps.

Windows Authentication Requirements

If you choose to implement Windows Authentication for Saleslogix Client users in your installation, users who are already logged on to Microsoft Windows will be able to access the Saleslogix Clients without having to pass through a Saleslogix Client log on screen. The Microsoft Windows user must be mapped to a Saleslogix user for this to be successful.

Windows Authentication functions and is configured for the Network and Web Clients.

Windows Authentication in the Saleslogix Network Client

In the Saleslogix Network Client, when Windows Authentication is enabled

- If a Windows user is mapped to a valid Saleslogix Client user, he or she does not see a Saleslogix Client log on page. The Network Client application simply opens.
- If a Windows user is not found to be mapped to a Saleslogix Network Client user, you can configure either of the following:
  - Display a log on screen and require the user to log on manually
  - Display an error screen.
    In this case the user cannot log on to Saleslogix.

To configure Windows Authentication for the Web Client, you must:

- Ensure the Use Windows Authentication check box is selected on the User Profile General tab for each Saleslogix Client user. For more information see “Configuring Users” on page 54.

Windows Authentication in the Saleslogix Web Client

In the Saleslogix Web Client, when Windows Authentication is enabled:

- If a Windows user is mapped to a valid Saleslogix Client user, he or she does not see a Web Client log on page. The Web Client application simply opens.
- If a Windows user is not found to be mapped to a Saleslogix Web Client user, the user cannot access the Saleslogix Web Client through this portal. An error message displays.
- To enable users to log on as the administrator, you must configure and deploy a second Saleslogix Client portal that does not include Windows Authentication.r.

Note: Ensure the Use Windows Authentication check box is selected on the User Profile General tab for each Saleslogix Client user. For more information see “Configuring Users” on page 54.

Other options for Windows Authentication in the Saleslogix Web Client can be configured by editing the Web.Config file and are:

- Windows Authentication off, SData on
- Windows Authentication off, SData off.

For information about these configuration options, see the *Enabling Windows Authentication Access for Web Client Users* topic in the Administrator Help.

To configure Windows Authentication for the Web Client, you must:

- Configure the WebDLL user. See “Configuring the WebDLL User for Windows Authentication” on page 44.
- Deploy an SData portal. See “Deploying a Saleslogix Web Portal” on page 43.
- Configure your Web Server. See “Configuring the Web Server” on page 66.
- Configure your Web Client computers. See “Configuring the WebDLL User for Windows Authentication” on page 65.
- In the Administrator, open the User Profile General tab for each Web Client user and ensure the Use Windows Authentication check box is selected. See the topic called “User Profile General Tab” in the Administrator help.

Windows Authentication in the Saleslogix Mobile Client

In the Mobile Client, when Windows Authentication is enabled:

- Users will still see a log on screen.

To configure Windows Authentication for the Mobile Client, you must:

1. Configure Windows Authentication for the Web Client.
2. Deploy the SData portal.
3. In the Administrator, make sure that the User Profile General tab for each Saleslogix user who will also be a Mobile Client user has the Use Windows Authentication check box selected. See the topic called “User Profile General Tab” in the Administrator help for more information.
4. Ensure that the Saleslogix user is associated to a Windows Domain user.

Saleslogix Job Service Requirements

The Saleslogix Job Service is a shared service that enables scheduling single and recurring tasks for immediate or delayed execution. This service executes tasks out of process, and so releases worker threads and memory for client sessions.

- Long running tasks offloaded to the Job Server can run asynchronously. When user sessions do not have to wait for long running processes to complete, fewer time-outs occur.
- Processing/memory intensive tasks offloaded to the Job Server eliminate competition for computing resources. The Job Server runs in a different process from the Web Host and consequently has a separate thread pool. It can be located on a separate server if necessary.

Although it is only required for a Saleslogix Web Client installation (including the Offline Web Client and Web Clients deployed at Remote offices), the Saleslogix Job Server can be consumed by any Saleslogix client when custom jobs are created to do so. Consider this service if your organization uses LAN or Mobile and typically has long-running tasks and/or resource intensive tasks. See *An Introduction to Job Server in Saleslogix.PDF* for more information about creating custom jobs.

The Saleslogix Job Service is installed with Admin Tools and Servers and requires the following:

- The Web Host and the SData portal must be installed, built, and deployed. See “Configuring the Web Host” on page 41 and “Configuring the SData Portal” on page 45 for more information.
- After installation, you must ensure the default Saleslogix user assigned for the Job Server to log on as has access to Saleslogix Application Entities and Activities. Use the WebDLL user after associating it with the Saleslogix Admin user. See “Modifying the Log On User for Saleslogix Job Service” on page 45 for more information.

If you prefer, you can change the Saleslogix Job Server Base Directory (the folder root for the file system deployment) from the default setting. You must do this after installation and then modify the SLXJobServer.exe.config file. Refer to *An Introduction to Job Server in Saleslogix.PDF* for details.

Server Requirements

In addition to the “General Requirements” on page 11, ensure the Server computer(s) meet the following requirements.

- Microsoft SQL Server or Oracle. Your database platform must be installed and running on the Database Server.
- When installing Oracle, ensure that the Oracle OLE DB Provider is installed.r.

By default, Saleslogix uses the OLE DB Provider installed with MDAC v2.8. If your implementation uses the SQL 2005 Native OLE DB Provider, you must install that provider on any computer where Saleslogix is installed.

- Saleslogix Logging Folders. Create and share the logging folders as detailed in “Logging Access Requirements” on page 21.

- Trust relationship. Establish a trust relationship if the Database Server is on a different network domain from some or all of the Saleslogix users and components. Ensure that these domains have a trust relationship with each other and can share data.

Microsoft SQL Server

- SQL Server Sort Orders set to 52 or 54. To check sort order information, type sp_helpsort in SQL Server Query Analyzer.
  - Sort Order 52 - Dictionary order, case-insensitive, for use with the 1252 character set.
  - Sort Order 54 - Dictionary order, case-insensitive, accent-insensitive, for use with the 1252 character set.
- SQL Server security set to SQL Server and Windows authentication. Verify this authentication is set on the Saleslogix Database Server.

  To change the authentication mode, open SQL Server Management Studio, right-click the appropriate server, and then click Properties. On the Security tab, set the Authentication to SQL Server and Windows.
- (Recommended for best performance) Microsoft SQL Server Client and Server component versions match. For example, if the Connection Manager uses the Microsoft SQL Server 2008 driver, then the Saleslogix Clients should use the 2008 driver.
- SYSDBA user is not assigned the System Administrators role. If the System Administrator's role within Microsoft SQL Server is selected for the SYSDBA user, you cannot log on to Saleslogix.

Oracle

- Saleslogix Oracle database is placed in its own instance.
- Oracle Provider for OLE DB Components. When installing, ensure that the Oracle Provider version matches your Oracle Server and Oracle Client version.
- Oracle Server, Oracle Client, and Oracle OLE DB Provider component versions match. The major version for all three pieces must be the same or compatibility issues may arise.

Saleslogix Client Requirements

In addition to the "General Requirements" on page 11, ensure the following are set up on each Client computer.

- Microsoft Outlook. You must install Outlook if you are using Outlook Integration or Outlook Sync. Ensure Outlook is installed and configured before installing Saleslogix.

  See "Outlook Integration Requirements" on page 20 for additional requirements.
- Small Fonts/Normal Size. Ensure the user's Windows' Display settings are set to Small Fonts or Normal Size (the name of the option varies depending on which version of Windows is installed).

  Access this setting using the Windows Control Panel.
- 1024 x 768 or higher screen resolution. Saleslogix screens are designed for higher resolutions. For optimum viewing, set the monitor resolution to 1024 x 768 or higher.
- Data Execution Prevention (DEP) for essential Windows programs and services only. If you are running Saleslogix on Windows Vista, ensure this setting is disabled.

  To access this setting, right-click My Computer > Properties > System Properties > Advanced tab > Performance > Settings > Performance Options > Data Execution Prevention tab > Turn on DEP for essential Windows programs and services only.
- (Windows Vista running Saleslogix Mail Client and/or Attach Remote only) User Account Control (UAC). Ensure the UAC setting is disabled on the Saleslogix Client computer if the operating system is Windows Vista and the user will be running the Saleslogix Mail Client and/or Attach Remote.

  To access this setting from the Windows Control Panel, double-click User Accounts and then click the Turn User Account Control on or off hyperlink.
- (Remote Clients Only) Microsoft SQL Express or Microsoft SQL Server. See the "Microsoft SQL Express installed on the Administrative Workstation" bullet in the "Software Requirements" section for installation details.

- (Oracle implementations only) Oracle Provider for OLE DB Components. You must install the OLE DB components on every computer running Saleslogix for database connectivity.

  When installing Oracle, ensure that the Oracle OLE DB Provider is installed. In addition, your Oracle Server version must match your Oracle Client version.

Web Client Requirements

In addition to the “General Requirements” on page 11, ensure the following are set up on each Web Client user’s computer.

- A supported browser. See the Compatibility Guide for supported browsers.
- 1024 x 768 or higher screen resolution. Saleslogix screens are designed for higher resolutions. For optimum viewing, set the monitor resolution to 1024 x 768 or higher.
- Microsoft Outlook. You must install Outlook if you are using Web Client Mail Merge and Outlook Send SLX capabilities.
- UTF-8 support for Internet Protocols enabled (Microsoft Office 2007). UTF-8 support must be enabled when users are exporting extended characters to e-mail.

  Enable UTF-8 support in Outlook from Tools > Options > Mail Format tab > International Options > Internet Protocols section.

Remote Office Requirements

In addition to the “General Requirements” on page 11, ensure the following requirement is met if your implementation includes a Remote Office.

- Microsoft SQL Server, Microsoft SQL Express, or Oracle. Your database platform must be installed and running on the Remote Office computer.
- IIS. A Web Server is required to host a Web Remote Office.

SpeedSearch Requirements

In addition to the “General Requirements” on page 11, ensure the following requirement is met if your implementation includes SpeedSearch running on Windows Vista Business Edition.

- Admin user configured to run the SpeedSearch Service. If the SpeedSearch Service is installed on a machine with Windows Vista Business Edition, the Local System Account/SLX Service User does not have enough inherited permissions to run the service.r.

- For increased security, set a domain user to run the SpeedSearch Service. The domain user should be the application pool user with access to the SpeedSearch Server.
- In Microsoft Windows 2012, assign full control permissions for the local SpeedSearch Directory to users running Saleslogix as a restricted user.

Outlook Integration Requirements

In addition to the “General Requirements” on page 11, ensure the following requirements are met if you are using Outlook Integration.

- Install and configure Outlook before installing Saleslogix.

Outlook Sync Requirements

In addition to the “General Requirements” on page 11, ensure the following requirements are met if you are using Outlook Sync.

- Your implementation must have access to the SLXClient Web Admin features, to enable the Outlook Sync integration.
- An SData portal must be deployed.

If your installation is:

- **Windows Network Client** only: Install the Web Host. Open the Application Architect and build and deploy the SLXClient and SData portals.
- **Remote Office and Offline Web Clients**: Deploy the SData portal along with the SLXClient portal. The SData portal is part of the Core Portals deployment.
- **Windows Remote Client**: no extra actions required. The SData portal is deployed as part of the LAN Remote Client install.

After installing, notify your Web Client and Windows Client users that they must configure Outlook Sync on their machines using the Saleslogix Connector.

Logging Access Requirements

Various Saleslogix services and applications need access to the local file system or logging folders to transfer information. The following information applies to both the main office (Host) and any Remote Offices.

- The process running the Saleslogix OLE DB Provider must have Write permissions to the local file system, specifically the “All Users” folder. Write access is necessary for the Provider to write queue files.
- The SLXSystem.exe must have Read/Write permissions to the local file system to read and delete the queue files created by the Provider. This process assumes the rights of the parent process that creates it. Therefore all Saleslogix services or processes that use the Provider or SLXSystem.exe must have local file system access (for example, SpeedSearch Service).
- The SLX Server Service user needs Read/Write permissions to the local file system to write the queue files it receives from the Client SLXSystem.exe. The SLX Server Service also runs the SLXLoggingServer.exe so the service must have Read/Write permissions to the location of the Workgroup Logs.
- The Sync Server, Synchronization Client, and SLXLoggingServer are the only applications that need access to the shared logging path. Network users do not need access to the shared logging path.

Understanding the Logging Folders

The following logging folders must be created and shared for a Saleslogix implementation. In an Express installation, the logging folders are created by Saleslogix.

Sync Logs Folder The Sync Logs folder is the root folder for synchronization files. The first time the Sync Server runs, sub folders are automatically created 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. This folder is also required for Reports in the Saleslogix Web Client.

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. This folder must be shared with the Administrative Workstation computer and with the computer on which the Synchronization Service is installed. If your implementation does not include Remote users or Remote Offices, you do not need this folder.

Remote Office Sync Logs Folder The Remote Office Sync Logs folder is necessary for implementations that contain a Remote Office. This is the root folder for Remote Office synchronization files. This folder must be shared to allow access by everyone (including the SLXService user).

Remote Office Library Folder The Remote Office Library folder contains all Library documents that Remote Office Network users have access to.

Remote Office Documents Folder The Remote Office Documents folder contains all documents that Remote Office Network users have access to.

Creating the Logging Folders

If your implementation does not include synchronization, the logging folder (Sync Logs) is usually located on the Administrative Workstation (the computer where you install the Administrator). In installations that use synchronization, the Sync Logs folder is best located on the Synchronization Server if it is a dedicated server. If you have a Document server, you can use it for the Library and Documents folders.

To create

1. In Windows Explorer, create the SyncService folder (for example, \\ServerName\SyncService).
   If your implementation does not include Remote users or offices, you do not need to create this folder.
2. In Windows Explorer, create the Sync Logs folder (for example, \\ServerName\Sync Logs).
   Ensure the Logging folder is shared and all Network and Remote users have network access to it. The path must also follow universal naming conventions (UNC), and you must be able to browse to it.
   If you are using synchronization, and more than one Sync Server is required, create separate folders for each sync server (for example, \\ServerName\Sync Logs1, \\ServerName\Sync Logs2).
3. In Windows Explorer, create the following folders:
   - Library (for example, \\ServerName\Library).
   - Documents (for example, \\ServerName\Documents).

The next step...

- If your implementation includes a Remote Office, create the Remote Office folders detailed in the following section.
- If your implementation does not include a Remote Office, share the logging folders as described in “Sharing Folders and Granting Access Rights” on page 23.

Creating the Remote Office Folders

A Remote Office contains a central set of shared folders used for synchronization, library files, and documents. If your implementation includes a Remote Office, you must create the Remote Office folders at the Remote Office site.

Typically, the synchronization folder (RemOffice Sync Logs) is located on the Remote Office Synchronization Client. However, you can create the synchronization folder on a separate file server. The Library and Documents folders can be created on the Remote Office Synchronization Client or a separate document server.

To create

1. In Windows Explorer, create the Remote Office Sync Logs folder (for example, \\ServerName\RemOffice Sync Logs) to store the synchronization sub folders.
2. In Windows Explorer, create the following.
   - Library (for example, \\ServerName\Library).
   - Documents (for example, \\ServerName\Documents).

Sharing Folders and Granting Access Rights

The Saleslogix folders must be shared before users can connect to them from the network.

When sharing folders, select one of the methods described in the following sections:

- “Granting Full Access Rights to All Users”
- “Sharing Folders and Granting Rights to User Groups”

Granting Full Access Rights to All Users

To share folders and assign access rights to everyone, you must:

- Enable file and print sharing.
- Assign the folders to be shared. This includes the SyncService, Documents, Library, Sync Logs, and Remote Office Sync Logs folder.

  This share includes the SLXService user. The SLXService user must have permissions set to Full Control for the Saleslogix folders.

Refer to Microsoft documentation for instructions to share folders and enable file and print sharing.

Sharing Folders and Granting Rights to User Groups

User groups allow you to manage permissions to the Saleslogix folders by group, rather than by individual users. For example, you can create a group of Remote users and assign access rights to the entire group. When a new user is created, you add that user to the group, and the permissions are already defined. This saves time when administering a large number of users.

Creating User Groups

Should you decide to grant access rights by group, you must create global groups on the Windows Server. A global group is available in its own domain, as well as any trusting domain you may have.

- Refer to Microsoft documentation for instructions to create user groups. The following user groups are recommended. r.

User Group	Represents
SlxAdmin	System Administrator and SLXService user
SlxNetwork	Saleslogix Network users
SlxSync	Synchronization Server
SlxRemote	Saleslogix Remote users

If Remote users need direct access to the main office database, include those users in both the SlxNetwork and SlxRemote user groups. For example, this would be necessary if users work remotely and also dock their laptop when in the office.

Sharing Folders by Group

After creating user groups, you must set the folder sharing rights and permissions for each group. Refer to Microsoft documentation for instructions to set folder permissions. The following user group access is recommended.

User Group	Type of Access
SlxAdmin	Full Control
SlxNetwork	Change

User Group	Type of Access
SlxSync	Change
SlxRemote	Change

Running Saleslogix as a Restricted User

To control security at a user level, you can create restricted users for Saleslogix. Since Admin rights to the local Windows computer are not required to run the Saleslogix Client, a restricted user with limited rights has full functionality.

Although Admin rights are not required to run Saleslogix, users need permissions to access specific directories on the local computer. You can set permissions using one of the following methods:

- Add the user to the local machine's Power User's group. Although this allows more than the minimum required rights, it requires less administration.
- Set permissions to specific directories. This grants the minimum required permissions but requires more administration. Set permissions to the following:
  - (Read/Write Access) Program Files\Microsoft SQL Server*instance name*\Data folder - this folder is only needed for Remote users running Saleslogix on a Microsoft SQL Express database.
- (Citrix users only) Copy the contents of the Business Objects folder to the Windows\System32 folder. r.

- Restricted users cannot register custom ActiveX objects contained in some Saleslogix Client views. A user with Admin rights must license and install the necessary components on each Saleslogix Client computer.
- In Microsoft Windows 2012, assign full control permissions for the local SpeedSearch Directory to users running Saleslogix as a restricted user.

Running Saleslogix on a 64-Bit System

When installing Saleslogix on 64-bit systems, be sure you have made the following adjustments to installation.

- The Web Host requires IIS. When Web Host is installed on a 64-bit server, IIS must be running in 32-bit mode. For the Web Host, this setting is applied as part of the installation.
- When creating an HTTP Synchronization profile on Microsoft Windows 2008, open IIS Service Manager and enable 32-bit applications. See "Creating an HTTP Synchronization Profile" on page 88 for more information.
- For Web installations running on 64-bit versions of Windows 2003, you must enable the 32-bit of ASP.NET 4.0. This setting is applied as part of the installation. If you manually set up your web site instead of using the Web Host install, see Appendix D, "Manually Configuring IIS for Web Host" on page 131 for more information on completing this task for IIS 6 and IIS 7.
- If you are running Saleslogix on a 64-bit system, you must run the Data Link Manager in 32-bit mode. See "Creating a 32-bit OLE DB UDL" on page 32.
- When setting permissions for the WebDLL user, read the steps under "The WebDLL User" on page 13 carefully to ensure you have enabled access to the locations required in a 64-bit system
- When your Microsoft Office installation is 64 bit, the Office Integration portion of Desktop Integration is not available.
- Although Export to File is supported in a 64-bit environment, in the Saleslogix Windows Client, Export to Excel requires integration with 32-bit Microsoft Office. In a 64 bit environment, it appears as unavailable.
- In the Saleslogix Windows Client, Mail Merge requires integration with 32-bit Microsoft Office.

After completing this chapter...

You have completed tasks 1-4 of the "Required Tasks" checklist. Proceed with Chapter 3, "Installing Saleslogix".

Chapter 3 | Installing Saleslogix

Before beginning this chapter...

Verify you have installed the prerequisites and created the logging folders as described in Chapter 2, “Preparing Your Environment”.

If you are installing Saleslogix on Oracle, ensure you have created the Saleslogix database as described in Appendix A, “Creating a Database for Oracle”.

Use the instructions in this chapter to...

Install the Saleslogix administration tools and server components. These components are required for all Saleslogix installations.

Selecting Your Installation

Saleslogix provides two installation options:

- **The Express Installation** is intended for a Saleslogix configuration of 5 to 25 users using the Microsoft SQL Server database platform. A supported version of Microsoft SQL Server or SQL Express must already be installed.

  The Express installation installs the following components on a single using system assigned default settings. It also creates and shares the default system folders.

  - Saleslogix Server
  - Saleslogix Blank and Evaluation Databases (Microsoft SQL Server)
  - Administration Workstation components:
    - Administrator
    - Architect
    - Application Architect
    - Saleslogix Utilities
    - SpeedSearch Service
    - Synchronization Server and Service

  The SData portal is not installed with the Express Installation. The Job Service, Windows Authentication, Outlook Sync, Saleslogix Mobile, SLX Address Book in Microsoft Outlook, insert VCard in Microsoft Outlook, insert ContactCard in Microsoft Outlook, and Insert Library doc in Microsoft Outlook all require the SData portal. If your implementation will use any of these modules, you must install using the Standard installation.

- **The Standard installation** allows you to choose what components you want to install and the location where you want to install them.

  The Standard Installation is intended for Saleslogix implementations that have more than 25 users, run on an Oracle database, access Saleslogix over the Web, or include a Remote Office(s).

For more information on system components, see the *Saleslogix Planning Guide*.

Understanding Saleslogix Databases

Your Saleslogix Implementation provides two databases: blank (for use as your production database), and evaluation (containing dummy data you can use for demonstrations and evaluations).

Do not use the evaluation database as your production database.

Microsoft SQL Server

Unless you have specified a different default data directory, the databases are installed to the same location as the Master.mdf (typically in the Microsoft SQL Server Data folder. The Data folder is a sub folder under your SQL instance name folder.) If the Saleslogix installation does not find SQL Server, or a Saleslogix database already exists, the databases are not installed.

SalesLogix.mdf This is your production database. The user name for this database is *admin*; the password is *password*.

SalesLogix_Eval.mdf This database contains accounts, contacts, tickets, defects, and so on, for demonstration or testing purposes. You can log on as admin, Lee, Dan, or any other regular user in the database. No password is required.

Creating a database on SQL Server with a name beginning with a number is not supported as a regular identifier, and therefore, not recommended. If you create a Host database using a name that begins with a number, you will receive errors when attempting to create a Remote user or Remote Office database.

The Saleslogix Express installation installs both the blank and evaluation Microsoft SQL Server databases and automatically creates two database connections named SalesLogix_Server (to the blank database) and SalesLogix_Eval (to the evaluation database).

The Standard installation installs the Microsoft SQL Server databases if Microsoft SQL Server is detected on the computer on which you are installing the Saleslogix Server.

Oracle

The SLX_Blank.dmp and SLX_Eval.dmp files are used to import data and the database structure to the Saleslogix database.

SLX_Blank.dmp This DMP file provides data that serves as your production database. The user name for the Saleslogix database created from the DMP file is *admin*; the password is *password*.

SLX_Eval.dmp This DMP file imports accounts, contacts, tickets, defects, etc., to your evaluation database for demonstration or testing purposes. You can log on to the Saleslogix database created from this DMP file as admin, Lee, Dan, or any other regular user in the database. No password is required.

If you have an Oracle database, you must create your database manually using the steps outlined in Appendix A, “Creating a Database for Oracle”.

Installing Saleslogix

Install Saleslogix directly from the Saleslogix DVD or from a network drive. To install from a network drive, copy the entire contents of the DVD to a shared network directory. The installation steps outlined in this guide assume the main installation browser is active. If the installation program does not start automatically, locate and double-click Setup.exe.

The Saleslogix installations create folders and apply permissions necessary for Saleslogix to function. To avoid unexpected results, Saleslogix recommends contacting Saleslogix Professional Services Group or your Business Partner before changing default settings on these folders.

Refer to one of the following sections as appropriate for your implementation:

- “Running the Express Installation” in the following section.
- “Running the Standard Installation” on page 28.

Running the Express Installation

To install

1. On the **Saleslogix Installation** screen, click **Express Server Installation**.

   Note If the installation does not detect the necessary prerequisites, you will be prompted to install them. Click Install to allow Saleslogix to install the required components or Cancel to stop the installation. Installing these prerequisites may require your computer to restart.

2. On the **Welcome** and **License Agreement** screens, read the information, accept the agreement, and then click **Next**.
3. Depending on your installation type, you will be prompted to enter some or all of the following information on the installation screens:
   - **SQL Server sa password** - If you have a password set for the sa account on the SQL Server, type your sa password. The installation requires this password to install and attach the Saleslogix databases.
   - **SQL Server sysdba password** - Type your Microsoft SQL Server sysdba password. The installation must validate the password of the sysdba user to create a valid connection string for the Saleslogix database.

   Note If you do not enter the sa and/or sysdba password, the databases are not installed.

4. On the remaining screens, click **Install** and **Finish** to complete the installation.
   To automatically open the Administrator after the installation, select Launch Administrator on the last screen.
5. If necessary, restart your computer.

The next step...

Depending on your installation and licenses, you may need to do the following after running the Express Installation:

- To enable SpeedSearch to function correctly, you must place all files and folders to be included in the default indexes in the ...\Program Files\Saleslogix\SpeedSearch\TextFile folder on the computer to which you installed Saleslogix. If you plan to customize the SpeedSearch indexes to include files located on another computer, you must change the Local System Account to a Network user such as the SLXService user. See “Permissions Required for the SLXService User (without Administrator rights)” on page 12 for more information about creating the SLXService user with the necessary access. See “Managing SpeedSearch Indexes” in the Administrator Help for more information on customizing SpeedSearch indexes.
- If you are installing on Windows 2003 Server, you must share the Sync Logs folder (created during the installation) and set security to Full Control. The Sync Logs folder is created in *My Server*\Sync Logs.
- Proceed with Chapter 4, “Configuring the Saleslogix System”.

Running the Standard Installation

Depending on your implementation, you may need to run the Standard Installation on multiple computers. Use the following instructions to install all components necessary for your implementation (for example, Saleslogix Server, Administrative Workstation, Sync Server, and so on).

Note If you are installing the Saleslogix database on a separate Database Server instead of the same computer as the Saleslogix Server, run the Standard Server Installation > Install SQL Databases installation on the Database Server before running the Standard Server Installation > Required Administrative Tools and Servers installation on the Saleslogix Server and other computers.

To install

1. On the **Saleslogix Installation** screen, click **Standard Server Installation**.
2. On the **Standard Server Installation** screen, click **Required Administrative Tools and Servers**.

Note If the installation does not detect the necessary prerequisites, you will be prompted to install them. Click Install to allow Saleslogix to install the required components or Cancel to stop the installation. Installing these prerequisites may require your computer to restart.

3. On the **Welcome** and **License Agreement** screens, read the information, accept the agreement, and then click **Next**.
4. On the **Setup Type** screen, select an installation type, and then click **Next**.

   Depending on your configuration, you may need to run the Administrative Tools and Servers installation on multiple computers. If you have not already done so, review the *Saleslogix Planning Guide* for more information on where to install Saleslogix components.

   - Select **Complete** to install all program features and the Microsoft SQL Server databases.

     Selecting this option installs Saleslogix using the Local System Account. To set a different user, particularly if SpeedSearch indexes include files located on another computer, select the Typical option.
   - Select **Custom** to install only certain components or to change the installation location. Use the **Custom Setup** screen to enable or disable items for installation.
     - **Saleslogix Server -** installs the components that primarily handle logging and licensing for Saleslogix. This is required for all installations.
     - **Administrator -** installs the Windows-based administration tool. This is required for all installations and is the only interface for entering Saleslogix licenses.
     - **Architect -** installs the component used to customize the Saleslogix Network Client.
     - **Application Architect** - required to configure and customize the Saleslogix Web components and portals.
     - **Saleslogix Job Server** - Installs the service used for scheduling tasks for immediate or delayed execution. You must install this service if your implementation includes any type of Saleslogix Web Client because it is required for features such as rolling over activities, updating support contracts, opportunities, and leads, reporting, and Export to Excel.
     - **Saleslogix Messaging Event Server** - enables communication between Saleslogix service components. This is required for all installations.
     - **Saleslogix Cache Server** - stores Web data which allows the cache to be real-time. This is required for all installations. Install on the machine that will accommodate the Web Host, or on the Application Server. Do no install on the SpeedSearch Server, and be sure to install only once per implementation.
     - **Saleslogix SData Synchronization Server** - installs the service used for Integration functionality.
     - **SpeedSearch Server -** installs the SpeedSearch Service.
     - **Synchronization Server** - required if your installation will include remote users or a remote office.
     - **.NET Extensions** - install if your Network Client customizers will want to distribute, license, release and deploy Network Client customizations written in the Microsoft .NET Framework.
     - **Utilities** - multiple applications to aid with customization and database maintenance.

5. Depending on your installation type, you will be prompted to enter some or all of the following information on the installation screens:
   - **Use Local System Account** - Select this option if the local user account has the correct security permissions to install Saleslogix. If you clear this option, set the information for the Saleslogix Service user you created as described in "Permissions Required for the SLXService User (without Administrator rights)" on page 12.

     If SpeedSearch indexes include files located on another computer, do not use the Local System Account. SpeedSearch requires a Network user to access information on other computers.
     - **Domain** - Type the network domain where you created the Saleslogix Service user.
     - **User Name** - Type the name of the Saleslogix Service user (for example, SLXService).
     - **Password** and **Confirm** - Type the Saleslogix Service user's password.
   - Port **Change** button - Changes the port number used for communication between the Clients and Saleslogix Server. In most implementations, the default port number does not need to be changed. However, if you have another application or service using port 1706, you should change the port number to an unused port.
   - **Install Blank and Eval databases if they don't already exist** (SQL Server Only) - This check box appears if you selected the option to install the Saleslogix Server, or the Complete installation. Unless you previously ran the Install SQL Databases installation, select this check box to ensure the databases are created.
     - **Password required for external read-only access** - If necessary, type a password used to allow third-party applications to import Saleslogix data but not allow changes to the Saleslogix database.
     - **Password required for external read/write access** - If necessary, type a password used to allow third-party applications to import Saleslogix data and make changes to the Saleslogix database.

     For more information on password settings for third-party applications, see the "Understanding Third-Party Access Scenarios" topic in the Connection Manager Help.

   - **SQL Server sa password** - If you have a password set on the sa account on the SQL Server, type the sa password. The installation requires this password to install and attach the Saleslogix databases.
   - **SQL Server sysdba password** - Type your Microsoft SQL Server sysdba password. The installation must validate the password of the sysdba user to create a valid connection string for the Saleslogix database.

     If you do not enter the sa and/or sysdba password, the databases are not installed.

6. On the remaining screens, click **Install** and **Finish** to complete the installation.

   If your database platform is Microsoft SQL Server and your database is installed on the same machine as the Saleslogix Server, select the Launch Administrator option and proceed with Chapter 4, "Configuring the Saleslogix System". Otherwise, do not select this option and continue with the following sections to create database connections.
7. If necessary, restart your computer.

Creating Database Connections

If you installed Saleslogix using the Express Installation or you ran the Standard Installation and installed the Saleslogix Server on the Database Server (Microsoft SQL Server only), Saleslogix automatically creates your database connections.

If your installation includes one of the following scenarios, you must create your database connection manually or modify the default connection. Generally you will create a connection to the blank and evaluation databases.

- If your database platform is Microsoft SQL Server 2008 or 2012, you must modify the default database connections.
- If your database platform is Microsoft SQL Server, and you are installing the Saleslogix Server and Saleslogix database on different computers, you must manually create database connections.
- If your database platform is Oracle, you must manually create database connections.
- If you are running Saleslogix on a 64-bit system, you must run the Data Link Manager in 32-bit mode. See "Creating a 32-bit OLE DB UDL" on page 32.

To create

1. On the **Start** menu, point to **Programs**, point to **Saleslogix**, and then click **Connection Manager**.
2. In the **Saleslogix Connection Manager**, do one of the following:
   - Click **Add** to create a new connection.
   - Select an existing connection and click **Edit**.
3. In the **Connection Name** box:
   a. In the **Name used to refer to this connection** box, type a name for the connection.
      The connection name can be a maximum of 32 characters and may include spaces. Duplicate names are not permitted.
   b. (Optional) To restrict third-party client access through this connection, set the **Read/Write password for this connection**, and if necessary, the **Read-Only password for this connection**. (Click the Change button next to the appropriate box to set the password.)
   c. Click **OK**.
4. On the **Provider** tab in the **Data Link Properties** dialog box, select the appropriate provider for your database platform, and then click **Next**.
   - *Microsoft SQL Server 2005*: select **SQL Native Client**
   - *Microsoft SQL Server 2008*: select **SQL Native Client 10**
   - *Microsoft SQL Server 2012*: select **SQL Native Client 11**
   - *Oracle*: select **Oracle Provider for OLE DB**
     If the Oracle Provider for OLE DB is not listed on the Provider tab, ensure you have installed the Oracle OLE DB Provider. See "Windows Authentication Requirements" on page 17 for more information.
5. On the **Connection** tab:
   a. For *Microsoft SQL Server 2005*: In the **Data Source** box, type the name of the Saleslogix Server.
      For *Microsoft SQL Server 2008* or *2012*: In the **Select or enter a server name** box, type the name of the Saleslogix Server.
      For *Oracle*: In the **Data Source** box, type the Net Service name for your database.
   b. Under **Enter information to log onto the server**, ensure **Use a specific user name and password** is selected.
   c. In the **User name** box, type the user name used to log on to the Database server (for example, sysdba).
   d. In the **Password** box, type the user password (for example, Ma$t3rk3y).
      Passwords are case-sensitive.
   e. Select the **Allow saving password** check box. You must select this option or the connection fails.
   f. For *Microsoft SQL Server*: specify the database to connect to:
      - For *Microsoft SQL Server 2005*, in the **Enter the Initial Catalog to Use** box, select the Saleslogix database from the list.
      - For *Microsoft SQL Server 2008* or *2012*, select the **Select a database** option, and then select the database from the list.
   g. Click **Test Connection** to verify the connection.
      If you cannot connect to the database, verify that the settings are correct (passwords are case-sensitive). Also verify that the database platform service is running on your Database Server.
6. **(Microsoft SQL Server 2008 and 2012)** On the **All** tab:
   a. Double-click **Persist Security Info**.
   b. In the **Property Value** drop-down list, select **True**.
   c. Click **OK**.
   d. Double-click **Integrated Security**.
   e. Click **Reset Value**.
      Data may exist that does not display in the Value field. This value must be reset to ensure that all data is removed.
   f. Click **OK**.
7. **(Oracle Only)** On the **All** tab:
   a. Double-click **Extended Properties**.

b. In the **Property Value** box, type chunksize=5000.

You must set the Property Value if you plan to create custom views that will be included when you create a remote database. If the value is not set, the SQL View is truncated on the remote database.

c. Click **OK**.

8. Click **OK** to save the information and close the **Data Link Properties** dialog box.

The next step...

- For installations running Saleslogix on a 64-bit system, proceed with "Creating a 32-bit OLE DB UDL" on page 32.
- For Microsoft SQL Server installations, proceed with Chapter 4, "Configuring the Saleslogix System".
- If your implementation included the Saleslogix Job Service and Saleslogix SData portals, you must install the Web Host, build and deploy the portals and modify the WebDll user permissions. See Chapter 5, "Installing the Web Components".
- For Oracle installations, create client database connections as detailed in the following section.

Creating Client Database Connections for Oracle

After installing a Client application (Administrator, Saleslogix Client, etc.) on Oracle, you must create a Net Service Name in the Oracle Net Configuration Assistant and a database connection in the Data Link Manager.

Creating a Net Service Name

You must create the Net Service Name (also called database alias) on the computer on which you installed a Client application. The Data Link Manager uses this alias to connect to the Saleslogix database.

Ensure that the database connection name is the same for every connection you create on all your Saleslogix Client computers. The names must match exactly for all connections to work.

Refer to the Oracle documentation for instructions to create a database alias.

Creating a Client Database Connection

The Data Link Manager is used to create a connection from the Client computer to the Saleslogix Server. This connection is configured automatically for Microsoft SQL Server installations. However, you must create a connection manually on each computer running Saleslogix on Oracle.

To create

1. Click **Start**, point to **Programs**, point to **Saleslogix**, and then click the application you want to log on to (for example, Administrator).
2. In the **Please log on** dialog box, click the ellipsis button in the **Log on to** box.
3. In the **Data Link Manager**, click **Add**.
4. On the **Provider** tab of the **Data Link Properties** dialog box, select the **Saleslogix OLE DB Provider** and then click **Next**.
5. In the **Select or enter the Saleslogix Server** box, select the computer on which you installed the Saleslogix Server.

   For Remote users, enter the computer name on which the Remote user's database is installed.
6. In the **Select Saleslogix database name** box, select the name of the connection configured for your database using the Connection Manager.

   See "Creating Database Connections" on page 29 for more information.

7. In the **Saleslogix User Name** and **Saleslogix Password** boxes, type the user name and password used to log on to Saleslogix.
   - When logging on to a third-party application using the Saleslogix OLE DB Provider, these fields allow you to log on using Saleslogix security.
   - If you are not using a third-party application, the user name and password are used to test the connection.
8. Select the **Allow Saving Password** check box. You must select this option or the connection fails.
9. Click **OK**.

Creating a 32-bit OLE DB UDL

If you are running Saleslogix on a 64-bit system and you have installed the provider extensions, you must run the Data Link Manager in 32-bit mode. Use the following steps to configure the Data Link Manager for a 64-bit system.

Both 32-bit and 64-bit machines must run the Data Link Manager and access the Saleslogix OLE DB Provider in 32-bit mode.

To create

1. Using Notepad create a blank UDL file named “test.udl”.
2. Save the UDL file to your C: drive.
3. Open the blank UDL file doing one of the following:
   - For a 64-bit machine, run the following command: C:\Windows\syswow64\rundll32.exe "C:\Program Files (x86)\Common Files\System\Ole DB\oledb32.dll",OpenDSLFile C:\test.udl
   - For a 32-bit machine, double-click the file in the file manager and run C:\Windows\system32\rundll32.exe "C:\Program Files\Common Files\System\OLE DB\oledb32.dll",OpenDSLFile <Saleslogix install folder>\’test’.udl
4. With the blank UDL open, open the Data Link Manager.

   To open the Data Link Manager, open a Saleslogix application and click the ellipsis button in the **Log on to** box.
5. In the Data Link Manager, create a new database connection and make sure you select the Saleslogix OLE DB Provider on the Provider tab.
6. Save the connection.
7. Move the UDL file to all computers that require a connection to Saleslogix.

   By default, the file should be stored in C:

After completing this chapter...

You have completed tasks 6-9 of the “Required Tasks” checklist.

Proceed with Chapter 4, “Configuring the Saleslogix System”.

Chapter 4 | Configuring the Saleslogix System

Before beginning this chapter...

Install Saleslogix as described in Chapter 3, “Installing Saleslogix”.

Use the instructions in this chapter to...

Configure the Saleslogix system components and set up your main office. These tasks are required for all Saleslogix installations.

Once you have installed the server components, you must log on to the Administrator and complete the following tasks:

- Add licenses.
- Enter Office information.
- (Oracle Only) Apply the Service Pack bundle.
- (Optional) Configure SpeedSearch.
- Configure Saleslogix options.
- Add Customer Service and/or Support information (if you are using the customer service and/or support features).

Logging On to the Administrator

The Administrator is used to manage users, servers, and offices. The following steps are also used when logging on to other Saleslogix Client applications.

To log on

1. On the **Start** menu, point to **Programs**, point to **Saleslogix**, and then click **Administrator**.
2. In the **Please log on** dialog box:
   a. In the **Username** box, type **admin**.
   b. In the **Password** box, type the corresponding password for the user name.
      The initial admin password for your production (blank) database is *password*. Passwords are case-sensitive and must be entered in lowercase characters, with no spaces.
   c. In the **Log on to** box, ensure the correct database connection name displays (for example, Saleslogix_Server).
      If necessary, you can add a new connection or change an existing connection using the Connection Manager.
3. Click **OK**.
   If you cannot connect to the database, ensure that the database path is correct in the Data Link Manager.

Understanding the Setup Assistant

The Setup Assistant is used to simplify the installation of licenses, to simplify the configuration of your office information, and to create users based on a Windows user list or pre-configured system templates.

Adding Licenses

Licenses determine the servers, offices, and users you can add to Saleslogix. See the *Saleslogix Planning Guide* for a description of each available license.

You can add licenses by typing the license number, using copy and paste from a text file, or by loading them directly from a file (right-click, and then click Load from file). The License Wizard filters extraneous text from the text file.

- All implementations require a Saleslogix license (Standard, Advanced, or Premier).
- The Web Host requires the Saleslogix Web Server license.
- To add Web Viewer users, you must add a WebViewer license. Users who access WebViewer require the same hardware, browser, and configuration as users who access the Web Client. See the “WebViewer User” topic in the Administrator Help for more information.

See the “Using the License Wizard to Add Licenses” topic in the Administrator Help for detailed steps.

Entering Office Information

After adding licenses, use the Setup Assistant to enter your main office information. This information includes your primary address, shipping address, and phone numbers.

To enter

1. In the Setup Assistant, select **Step 2 - Enter Office Information**, and then click **Run Selected Step**.
2. Type your company information such as division name (if applicable), primary and shipping addresses, and telephone numbers. Only the Company Name is a required field.
3. Click the **Sync Options** tab.

   In the **Shared Paths** section, make sure the **Sales Library** and **Attachments** paths are correctly mapped to the folders you created when configuring logging access. See “Creating the Logging Folders” on page 22 for details.

   If your implementation includes the Web Client, the Attachment path must be set correctly or your Web Client users will not be able to run reports.

4. Click **OK**.

The last step of the Setup Assistant simplifies the process of adding Saleslogix users. The process for adding users is detailed in Chapter 6, “Configuring Saleslogix Users”.

Configuring Saleslogix Options

You can configure the appearance of the Administrator and Saleslogix Client, set default password and Remote database options, and configure other custom options. The options required for a successful implementation are detailed in the following sections.

Refer to the “Configuring Saleslogix Options” topic in the Administrator Help for information on other options.

Setting Accounting Options

Accounting options contain system-level information that allows Saleslogix to communicate with external accounting applications. This information must be configured before database transfer between Saleslogix and the accounting application can take place.

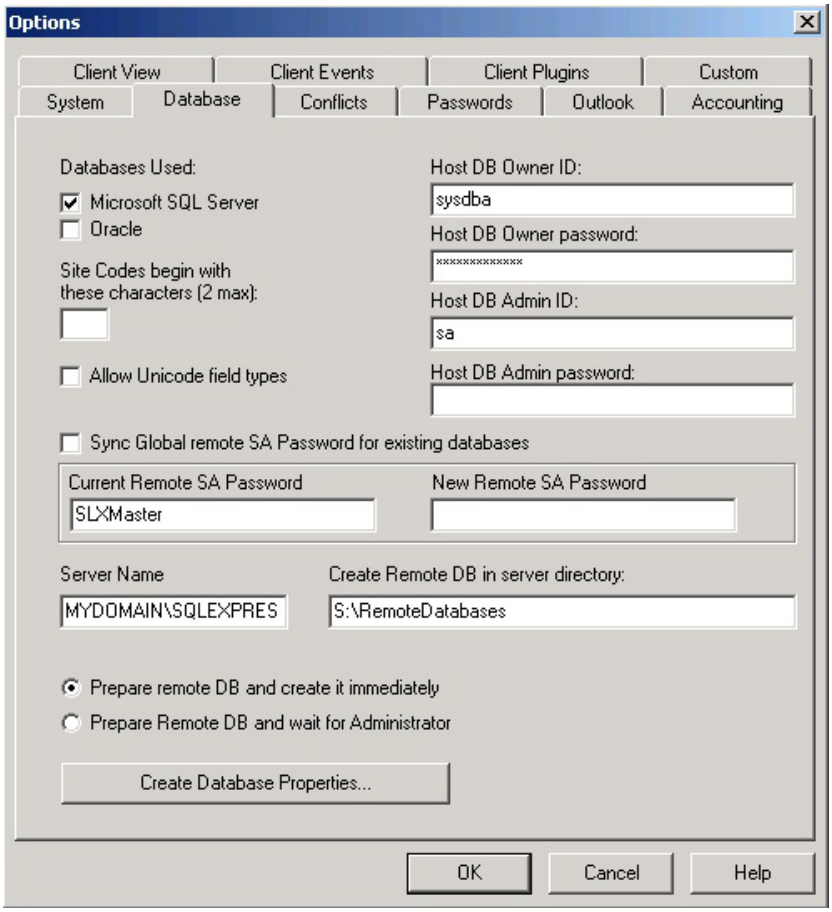
- See the “Setting Accounting Options” topic in the Administrator Help for details.
- When sharing accounting information using Accounting Integration, see Appendix B, “Configuring Accounting Integration” for configuration details.

Setting Database Options

Database options allow you to configure the default settings used when creating Remote user or Remote Office databases. If you have a Microsoft SQL Server database and your implementation does not include Remotes, you do not need to set database options.

To set

1. On the Administrator **Tools** menu, click **Options**, and then click the **Database** tab.



Option	Action
Databases Used	Select your database type(s) for the main office and Remotes. The database type defaults to Microsoft SQL Server. You must set your database type(s) before using DB Manager.
Site Codes begin with these characters	Type a one- or two-digit prefix for Remote site codes. If you do not use this feature, site codes are randomly generated. Forcing a prefix helps identify the source of a particular file, such as a Remote Office.
Allow Unicode field types	Select to enable field selectable Unicode support. Field selectable-Unicode is limited to specific feature areas. Extending the database for Unicode requires a strong knowledge of Saleslogix and its database schema. Before implementing this feature, you should carefully review the “Understanding Unicode” topic in the Administrator Help for details.
Host DB Owner ID	Type the user name of the Remote database owner. This must be set to sysdba.
Host DB Owner password	Type the sysdba password used by the host database. This is configured automatically when logging on to Saleslogix.
Host DB Admin ID	Type the user name of the database system administrator. This is usually sa, but may be any admin level SQL Server user identity. If the Host database is Oracle, then it must be set to sa.
Host DB Admin password	Type the password corresponding to the Host DB Admin ID user name. For Oracle, leave this field blank.
Sync Global Remote SA Password for existing databases	Select this option to send a new password to a remote database through synchronization. This check box is only available to users who have logged on as admin. During synchronization, if the password set in the Current Remote SA Password box matches the password on the Remote Microsoft SQL Express instance, then the password is changed to the password set in the New Remote SA Password box. The new password is sent to remotes during the next synchronization cycle. **Note** If the SQL Express instance was installed from the Saleslogix media, and you correctly set the SAPWD property, the default instance password is SLXMa$t3r.
Server Name	Displays the machine name of the server. This field is Read Only for a SQL Server host, and is blank for an Oracle host. For Oracle, set this value to a computer where Microsoft SQL Express is running (for example, the administrator's computer).
Create Remote DB in server directory	Type the path to the location where Remote databases will be created. The location of the folder can be on the Database Server, the Administrative Workstation’s Microsoft SQL Express instance, or any Microsoft SQL Server where the appropriate permissions have been provided (for the sa or similar user). Use the format drive letter:\shared_folder_path. Do not include the computer name. • The folder must be shared. • If you are creating remote databases on the Microsoft SQL Server Host, ensure the permissions for Creator Owner are set to a minimum of Change.
Prepare Remote DB and create it immediately	Creates and runs the DTS file. The DTS file creates the remote database. This is the recommended option.

Option	Action
Prepare Remote DB and wait for Administrator	Creates and saves the DTS file. This enables you to run the DTS file and create the database at a later time. This setting is not recommended unless you are an experienced Microsoft SQL DBA. This method requires a user interface and scheduler to connect to the database and run the DTS package.

2. Click **OK**.

Understanding E-Mail Integration

Saleslogix is integrated with Microsoft Outlook to allow users to share information between the two applications.

Feature and Availability	Allows users to:	Availability
Standard Outlook Integration	• Add Saleslogix Contacts to Outlook	Network only
	• Use the Send SLX button in Outlook to record information to Saleslogix	Network and Web
	• Save Outlook attachments to Saleslogix	Network and Web
	• Record to Saleslogix History from Outlook in one click	Network and Web
	• Drag and drop from the Outlook Inbox to Saleslogix History	Network and Web
	• Use the Saleslogix Address Book in Outlook	Network and Web
	• Attach documents from the Saleslogix Library to an Outlook e-mail	Network and Web
	• Attach a Saleslogix Contact vCard in Outlook	Network only
Advanced Outlook Integration	• Use Outlook Attendee availability in Saleslogix • Schedule meeting requests in Saleslogix and Outlook (even for non-Saleslogix users) • Use the Outlook Calendar in Saleslogix • Flag Outlook e-mail received from Saleslogix Contacts	Network only. Advanced Outlook Integration is not available for the Web.
Outlook Sync	• Synchronize contacts between Saleslogix and Outlook • Synchronize calendar items between Saleslogix and Outlook	Network and Web

Activating Advanced Outlook Integration

When Advanced Outlook Integration is activated, the following features are enabled. All other Advanced Outlook Integration features require no activation.

- The Attendee Availability tab appears when a user schedules a meeting or phone call in the Saleslogix Client, which automatically places the request on the users' Saleslogix and Outlook calendars.
- When a user accepts a meeting invitation in Outlook, the meeting is automatically placed on the user's Saleslogix and Outlook calendars.

Internet Only Mode is not recommended for Advanced Outlook Integration.

To activate

1. On the Administrator **Tools** menu, click **Options**, and then click the **Outlook** tab.

2. Select the **Activate Advanced Outlook Integration** check box.
3. Select how attachments using Send SLX are saved with a history record.
   - **Save attachments as individual files** - Attachments to e-mail are saved as individual files on the Attachments tab for the e-mail activity record (in History). If the user answers “Yes” to the prompt which asks if the user would like to save attachments to the account or contact that is associated to the e-mail, the individual files are saved as attachments.
   - **Bundle attachments with e-mail message (MSG format)** - The e-mail is attached as an MSG file to the history record. If the user answers “Yes” to the prompt which asks if the user would like to save attachments to the account or contact that is associated to the e-mail, the MSG file is saved as an attachment.
4. Configure Internet domains that should be excluded from some of the features of Advanced Outlook Integration.

   When you add a domain, e-mail messages are not recorded to history for users in that domain and e-mail messages from users in the domain do not contain the “Flag for Follow up.”

   a. Click **Add**.
   b. In the **New Domain Entry** dialog box, type the domain name.

      Use the format company.com or employee@company.com. Domain exclusion settings are case-sensitive.
   c. Click **OK**.

      After you add a domain exclusion, you can deactivate, edit, or delete it by selecting the domain and clearing the check box or clicking the appropriate button.

Additional configuration is required for Standard Outlook Integration. Configuration steps are detailed in Chapter 7, “Installing Network Clients”, and Chapter 8, “Configuring the Web Client”.

Activating Outlook Sync

When Outlook Sync is activated, contacts and calendar items synchronize between Saleslogix and Microsoft Outlook. The Administrator must enable Outlook Sync functionality before users can install it locally. Outlook Sync is enabled in the Saleslogix Web Client in Integrations. For more information, see “Activating Outlook Sync” on page 50.

Adding Address Lists to the Outlook Addressing Tab

Adding Saleslogix Address Lists to the Outlook Addressing tab allows users to perform contact name resolution. Contact name resolution occurs when a user types a contact name in the To, Cc, or Bcc fields in an e-mail message. Outlook then reconciles the contact name with the information in the Saleslogix Address List. In addition to contact names, you can add Account and/or Opportunity Address Lists to reconcile Saleslogix account, opportunity, ad-hoc groups, and user names.

This section applies to Standard Outlook Integration in a Network environment. The following steps are not required if you are implementing Advanced Outlook Integration or Standard Outlook Integration on the Web.

To add

1. In Microsoft Outlook, on the **Tools** menu, click **Address Book**.

   The Address Book dialog box appears.
2. On the **Tools** menu, click **Options**.
3. In the **Addressing** dialog box, click **Add**.
4. In the **Add Address List** dialog box, scroll to the Saleslogix Address Book listing, and select an address list (for example, Contacts).
5. Click **Add**.
6. Continue adding the appropriate Saleslogix address lists, and when finished, click **Close**.
7. In the **Addressing** dialog box, click **OK**.
8. Close the **Address Book** dialog box.

Adding Customer Service and Support Information

If you are using customer service and/or support features, you must complete the Service/Support tab on the Office Information dialog box. Use this tab to set the hours of operation for your business and to determine how tickets are assigned.

To add

1. On the Administrator Navigation Bar, click **Systems**.
2. Click the **Offices** tab, double-click your main office in the grid, and then click the **Service/Support** tab.
3. In the **Open** and **Close** boxes, select the time your normal business hours start and end.

   The Hours of Operation area defines the time used for certain reports and follow-up activities.
4. In the **Time units in minutes** box, type the smallest billable time unit to use for tracking the time spent on a ticket.
5. If your company includes the weekend as part of the regular work week, select the **Work weekends** check box.
6. In the **Ticket Assignment Options** area, select one of the following:
   - **Unassigned** - Tickets are left unassigned until a user views the call and assigns it.
   - **Logged-in user** - Tickets are assigned to the user that saves the ticket.
   - **Auto-assignment** - Tickets are assigned to the user or team associated with an Area. If an Area has no associated user or team, the ticket is left unassigned. Area values are configured in “Creating Area, Category, and Issue Lists” on page 61.
7. Select the **Default user or team assigned to account overrides Ticket Assignment Options** check box if you want the Default User/Team selected on the Saleslogix Client > Account > Notifications tab to override the Ticket Assignment Option.

   For example, if you set the Ticket Assignment Option to Logged-in user, and select this check box, any tickets created for an account that has a Default User/Team set in the Saleslogix Client will be assigned to the defined user/team. Any accounts that do not have a Default User/Team set, will be assigned to the logged-in user. If this check box is cleared, new tickets for an account are assigned to the logged-in user even if the account has a user/team selected as the default for new tickets.
8. Under **SpeedSearch**, choose whether or not to use an approval process to determine which new tickets and defects are added to SpeedSearch.

   Refer to the “Understanding the SpeedSearch Approval Process” topic in the Administrator Help for more information.
9. Click **OK**.

Understanding SpeedSearch

SpeedSearch allows users and external customers to search for information stored in the Saleslogix database, such as tickets, standard problems, procedures, attachments, Library documents, and external documents on your network. An index is a collection of files or records that a user can search against.

Note The Advanced SpeedSearch license is required to search the History and Activity indexes.

Typical implementations include only one SpeedSearch Service. However, if your implementation includes multiple Saleslogix Servers and databases, you should install additional instances of the SpeedSearch Service on separate machines. Then, you must use a configuration utility to match each SpeedSearch Service with the appropriate Saleslogix Server and database connections.

If you have more than one SpeedSearch Server or for more SpeedSearch information, see the following topics in the Administrator Help.

- To configure SpeedSearch for multiple databases, see "Updating the SpeedSearch Service Configuration".
- For a description of the default indexes, see “Standard SpeedSearch Indexes”.
- For detailed steps on creating new file system and database indexes, see “Managing SpeedSearch Indexes”.
- To change the default index schedules or create new schedules, see “Managing SpeedSearch Schedules”.
- To understand how SpeedSearch information synchronizes with Remotes, see “Understanding SpeedSearch and Remotes”.

Maintaining Database Security

After installing and configuring Administrator, you should change passwords to maintain maximum security. For security reasons:

- Change the administrator user password when you configure your users. See the “Changing a User’s Password” topic in Administrator Help for more information.
- Change your database password using SQL Server Management Studio or DBA Studio.

  After changing the sysdba password in SQL Server Management Studio or DBA Studio, you must change the password in the Connection Manager on the Saleslogix Server. See the Connection Manager Help for detailed instructions.

After completing this chapter...

You have completed tasks 10-14 in the “Required Tasks” checklist. If your implementation includes the Web components, Outlook Sync, or the Saleslogix Job Server, proceed with Chapter 5, “Installing the Web Components”.

If your implementation is Windows only but your users will require access to the SLX Address Book, insert VCard, insert ContactCard, and insert Library doc in Microsoft Outlook, you must install the Web Host and build and deploy portals. Proceed with Chapter 5, “Installing the Web Components”.

Otherwise, proceed with Chapter 6, “Configuring Saleslogix Users”.

Chapter 5 | Installing the Web Components

Before beginning this chapter...

Ensure the Admin Tools and Servers network components are installed, configured, and working correctly as detailed in Part I of this guide.

Use the instructions in this chapter to...

Install server components and deploy your Web site. These tasks are required for all Saleslogix Web installations, including Remote Offices and Offline Client Users.

The Saleslogix Web components provide the infrastructure supporting the portals needed for the following functionality:

- Saleslogix Web Client
- Outlook Sync
- Web Client reporting
- Job Service
- SData
- Saleslogix Mobile

The Saleslogix Web components are:

- Web Host: required for users to access Saleslogix functionality via the Web
- Saleslogix Cache Server: stores Web data which allows the cache to be real-time. Installation for this piece is located in the Admin Tools and Servers install. You can install it on the machine that will accommodate the Web Host, or on the Application Server. and it can be installed before the Web Host is installed. Do no install on the SpeedSearch Server, and be sure to install only once per implementation.

Configuring the Web Host

The Web Host enables users to access Saleslogix functionality via the Web. Larger implementations require additional Web Hosts and/or virtual servers. (For more information, see “Scaling the Web Implementation” on page 125.)

This installation:

- Installs the Web components and Web content files.
- Automatically creates a Web site if you select the Create Web Site check box during the installation.

To install

1. You must log on as the local administrator to install the Web components on each machine.
2. On the **Saleslogix Installation** screen, click **Standard Server Installation**.
3. On the **Standard Server Installation** screen, click **Web Host on IIS**.

   If the installation does not detect the necessary prerequisites, you will be prompted to install them. Click Install to allow Saleslogix to install the required components or Cancel to stop the installation.

4. On the **Welcome** and **License Agreement** screens, read the information, accept the agreement, and then click **Next**.
5. On the **Setup Type** screen, select an installation type, and then click **Next**.
   - Select **Complete** to install the Web Host.

- Select **Custom** to install only the Web Host. Use the **Custom Setup** screen to change the installation location.

The Saleslogix Cache Server is part of the Admin Tools and Servers installation, but is usually installed on the Web Host. If you install the Saleslogix Cache Server on a server other than the Web Host, you must manually configure the web.config file to access the Saleslogix Cache Server computer. See the "Configuring the Saleslogix Cache Server" topic in the Application Architect help for details.

6. Depending on your installation type, you will be prompted to enter some or all of the following information on the installation screens:
   - **Use an existing web site** - If you want the installation to use an existing Web site, click this button and select the Web site name.
   - **Create Web Site** – Select this check box if you want the installation to automatically create a Web Site. Selecting this check box creates a Web site you can use to deploy the Web portals.
     If you prefer to perform Web site configuration manually, clear the Create Web Site check box and follow the instructions in Appendix C, "Advanced Web Host Configuration".
   - **Enter a Web site name** – Type the name of the Web site that will appear in IIS. The default name is Saleslogix.
   - **Port** – Enter the port number that the Saleslogix Web site will use. Note the port number for future reference. You must use port number 1025 or greater. The default is 3333.
   - **Domain** – Enter the network domain where you created the WebDLL user as described in "The WebDLL User" on page 13.
   - **User Account** – Enter the name of the WebDLL user. The default value is *WebDLL*. If you used a different name, type it exactly as you did when you created it.
   - **Password** and **Confirm Password** – Type the WebDLL user's password.
   - **Configure Saleslogix Database** - Clear this check box if you do not want to connect to the Saleslogix database, but still want to create a Web site. When you clear this check box, the other options on this screen are disabled.
     - **Saleslogix Server** – Select or type the name of the computer on which you installed the Saleslogix Server.
     - **Saleslogix Database Alias** – Select or enter the name of the connection to the Saleslogix database.
     - **Search for servers on port** - Enter a port. By default, this is set to port number *1706*.
     - **User Name** – Enter a Saleslogix Server user name (such as Admin).
     - **Password** – Enter the Saleslogix Server password for the Saleslogix user.
7. On the remaining screens, click **Install** and **Finish** to complete the installation.

Building a Web Platform

You must build the Web platform before you configure or deploy Web application files.

To build

1. Open the Application Architect.
2. On the **View** menu, click **Project Workspace Manager**.
   The Project Workspaces window opens and the default Saleslogix Web project workspace appears (*VFS on server:saleslogixdb*).

   Note The server is the name of your Web server, and the Saleslogix DB is the name of your Saleslogix database.

3. Double-click the default project workspace.
   The Project Explorer window opens and the project you selected appears in a tree view.
4. Click the project, and then on the **Build** menu, click **Build Web Platform**.
   Failure to build the Web platform before deploying will result in errors.
5. If necessary, on the **View** menu, click **Output Window** to view the build status.

Deploying a Saleslogix Web Portal

The Application Architect Deployment Explorer allows you to create deployments that consist of Targets (destinations) and Portals (configurations). A deployment is used to configure a portal, or Web application, for deployment to a specific target or destination.

Typically, Web portals are deployed to localhost on IIS. However, you have the option of deploying the Web portals to a Web site you create during Web Host installation or to a Web site you create using IIS.

To deploy

1. On the Application Architect **View** menu, click **Deployment Explorer**.
2. Expand **Deployments**, and then double-click the appropriate deployment name. The following default portals are available:
   - **Core Portals** - contains the SlxClient, ProcessHost, SData, and SlxJobService portals. The ProcessHost and SlxClient portals are dependent on each other; although the Process Host is not necessary for the Web Client to function. The SlxJobService portal requires the SData portal.
   - **Saleslogix Customer Portal** - contains the Saleslogix Customer Portal portal.
   - **Saleslogix Mobile Client portal** - contains the Saleslogix Mobile Client portal. If this portal is not visible, select Core Portals, right-click IIS, select the Saleslogix Mobile Client portal and then click OK.
   - **Remote Sales Client** - contains the Saleslogix Client portal and the SData portal.
3. In the **Name** box, type a name for the deployment.
4. In the **Description** box, type a description for this deployment.
5. (Optional) Select the **Use this deployment for debugging** option to set this deployment as your default deployment.

   This option allows you to use the Run button on the toolbar to perform a one-click deployment of all portals you designate in a default deployment.
6. In the **Deployment Targets** tree view, click **IIS**.

   The IIS Target Settings appear.
   a. In the **Server** box, type the name of your Web Host server.

      By default, this is localhost; however, you can deploy to any Web Host server.
   b. In the **Base Directory** box, type the location where the files generated for the Web server will be saved.

      The default is ...\inetpub\wwwroot. If necessary, click the ellipsis button to browse for and select a different directory path.

      Note: The Saleslogix Job Server default Base Directory is %ALLUSERSPROFILE%\Sage\Scheduling\Tenants. If you change this default, you must change the tenantRoot key value in the SLXJobServer.exe.config file. Refer to *An Introduction to Job Server in Saleslogix.pdf* for details.

   c. In the **Port** box, type the port number for your Web Host server. It must match the port for the Web site. For example, if you used the default port 3333 during Web Host installation, the port is 3333.
   d. In the **App Pool** box, type the name of the application pool for your Web site.

      This name corresponds to the associated application pool for your Web site. For example, if you used the default Saleslogix Web site, the App Pool is Saleslogix. For the Process Host portal, you can use the same IIS application pool used by the Saleslogix Client portal.
   e. Ensure the **Deploy Target** check box is selected. This indicates the target is active and should be deployed.
   f. (Process Host and SData only) Ensure the **Restore Virtual Directory Settings on Update** option is cleared.
7. Click the **SlxClient** tab:
   a. In the **Virtual Directory** box, type the alias name for the virtual directory. The default Virtual Directory is the portal name. For example, SlxClient, SLXCustomerPortal, and so on.

      If you are configuring the SData portal, do not change the virtual directory value.

b. In the **Sub Directory** box, type the folder name where all portal files will be copied under the target's base directory.
c. Select the **Deploy Portal** option.
This indicates the portal is active and should be deployed.

Note When the Inherit from Target check box is selected, the deployment uses the port and application pool settings of the current target to deploy the portal (these settings are specified under IIS Target Settings). If necessary, clear this check box and set a different Port and App Pool for the portal.

8. When deploying the Core Portals, repeat step 7 for the ProcessHost and SData portal tabs.
9. In the **Deployment Targets** tree view, click **SlxJobService (File System)**.
   a. In the **Base Directory** box, type the location where the files generated for the Job Service will be saved.
   b. The default is ...%ALLUSERSPROFILE%\Sage\Scheduling\Tenants. If necessary, click the ellipsis button to browse for and select a different directory path.
10. On the **SlxJobService** tab:
    a. In the **Sub Directory** box, type the folder name where all portal files will be copied under the target's base directory.
    b. Select the **Deploy Portal** option.
    This indicates the portal is active and should be deployed.
11. Click **Save**.
12. Click **Deploy All**.

When the Output Window indicates the deployment is finished, define the default document for the Web site.

For more Process Orchestration information, refer to the "Implementing Process Orchestration" topic in the Application Architect help.

Configuring the WebDLL User for Windows Authentication

You must configure the WebDLL user for Windows Authentication to allow the Saleslogix Web Client to open a connection to the Saleslogix database. This task must be completed even in installations that do not include Windows Authentication for Saleslogix Network and Web Client users.

To configure

1. Open the Administrator.
2. On the Navigation Bar, click **Users**.
3. In the **Users** view, double-click the **Admin** user name, and then click the **General** tab.
4. Select the **Use Windows Authentication** check box.
5. In the **Windows ID** box, click the Find button.
   The Please select a Windows user to match the Saleslogix user dialog box appears.
6. In the **Add Name** box, type your server name and WebDLL user name, and then click **OK**.
   For example, servername\WebDLL.
7. In the **Import user data** box, click **No**, and then click **OK**.
8. Set permissions to allow the WebDLL user to alter the DNS on the domain.
   To configure Windows Authentication for Web Client users, setspn commands must be executed by a user that has rights to modify the active directory. This permission can be removed from the WebDLL user after running the setspn commands.
   If you have a DNS admin user with proper permissions, you can omit this step.

Modifying the Log On User for Saleslogix Job Service

The Saleslogix Job Service must be able to log on as a Saleslogix user, and that user must have access to Saleslogix Application Entities (such as Leads and Opportunities) and Activities. By default, the user assigned to the Saleslogix Job Service is the Local System Account user. After installation, you must set the Job Service to log on as the WebDLL user after making sure the WebDLL user is mapped to the Saleslogix Admin user. If your implementation includes Remote Office(s), ensure there is a trust relationship between the domain at the Main office and the domain at the Remote office.

If you are using the WebDLL user and have already completed “Configuring the WebDLL User for Windows Authentication” on page 44, begin at step 8.

To configure

1. Open the Administrator.
2. On the Navigation Bar, click **Users**.
3. In the **Users** view, double-click the **Admin** user name, and then click the **General** tab.
4. In the **Windows ID** box, click the Find button.
   The Please select a Windows user to match the Saleslogix user dialog box appears.
5. In the **Add Name** box, type your server name and user name, and then click **OK**.
   For example, servername\WebDLL.
6. In the **Import user data** box, click **No**, and then click **OK**.
7. Set permissions to allow the WebDLL user to alter the DNS on the domain.
8. Open Windows Services and right-click the **Saleslogix Job Service**.
9. Click **Properties**.
10. In the **Saleslogix Job Service properties** dialog box, click the **Log On** tab, and select the **This account** option button.
11. Click **Browse**.
12. Specify the Location.
    For example, the domain where you created the WebDLL user.
13. Type the name of the domain user credentials specified in step 5.
    In this example, the WebDLL user.
14. Restart the Job Service and verify that it started successfully.

Configuring the SData Portal

The SData portal provides RESTful data access to the Saleslogix database through SData feeds. It also provides a communication front-end to the synchronization service used to integrate with accounting systems and to the Saleslogix Job Server. The SData portal is also required for Desktop Integration functionality, Windows Authentication, and Saleslogix Mobile.

Refer to one of the following sections as appropriate for your Windows version:

- “Windows 2003” on page 45
- “Windows 2008 and 2012” on page 46

Windows 2003

After deploying the SData portal, you must configure authentication settings and configure handler mapping.

To configure

1. Open IIS Manager, expand **Web Sites**, and then expand the Saleslogix Web site.
2. Right-click the **SData** portal, and then click **Properties**.

3. Click the **Directory Security** tab, and then, under **Authentication and Access Control**.
4. Check **Enable anonymous access** and enter the **User name** and **Password** for the WebDLL user.
5. Under **Authenticated Access**, clear the **Integrated Windows Authentication** option.
6. Click **OK**.
7. On the **Virtual Directory** tab, in the **Application Settings** section, click **Configuration**.
   The Application Configuration dialog box opens.
8. On the **Mappings** tab, under **Application Extensions**, select the **.ashx** extension, and then click **Edit**.
   The Add/Edit Application Extension Mapping dialog box opens.
9. Select the entire entry in the **Executable** box, right-click, and then click **Copy**.
10. Select the **All verbs** option, and then click **OK**.
11. In the **Wildcard Application Maps** area, click **Insert**.
12. In the **Add/Edit Application Extension Mapping** dialog box, right-click the **Executable** box, and then click **Paste**.
    The file C:\WINDOWS\Microsoft.NET\Framework\v4.0.30319\aspnet_isapi.dll is pasted into the box.
13. Clear the **Verify that file exists** check box.
14. Click **OK**.
15. Click **OK** twice more.
16. Close IIS Manager.

If you are using Windows Authentication, see the topic "Enabling Windows Authentication Access for Web Client Users" in the Administrator Help for additional configuration steps.

Windows 2008 and 2012

No manual configuration steps are required. Integrated app pools (used in Saleslogix version 8 and later) do not require manual handler mapping setup. Any other settings are performed by the deployment.

If you are using Windows Authentication, see the topic "Enabling Windows Authentication Access for Web Client Users" in the Administrator Help for additional configuration steps.

Configuring for Performance

This section contains recommendations for optimizing your Web site performance.

Configuring IIS Settings for Performance

In order to cache, and therefore improve performance, use the following IIS settings for the css, images, and libraries subdirectories in each Saleslogix Client portal that you deploy.

To configure for IIS6

1. In IIS Manager, expand **Web Sites**, and then expand the Web site containing the Saleslogix Client portal you want to configure for performance.
2. Expand **SlxClient**, right-click the **css** subdirectory folder, and then click **Properties**.
3. Click the **HTTP Headers** tab.
4. Select the **Enable content expiration** check box.
5. Select **Expire after** and set the expiration for **365 days**.
   Sending a query more frequently will impact performance. If you often customize files in the css, images, and libraries directories, you can either set a shorter expiration period or else users may need to clear the browser cache to get changes.
6. When you are finished, click **Apply**.
7. Repeat steps 2-6 for the images, jscript, and libraries subdirectories, and then click **OK**.

To configure for IIS7.x

1. In IIS Manager, expand **Web Sites**, and then expand the Web site containing the Saleslogix Client portal you want to configure for performance.
2. Expand **SlxClient** and click the **css** subdirectory folder.
3. In the IIS section, open the **HTTP Response Headers** item.
4. In the Actions panel, select the **Set Common Headers**... link.
5. Select the **Expire Web Content** check box.
6. Select **Expire after** and set the expiration for 365 days.

   Sending a query more frequently will impact performance. If you often customize files in the css, images, and libraries directories, you can either set a shorter expiration period or else users may need to clear the browser cache to get changes.
7. When you are finished, click **OK**.
8. Repeat steps 2-6 for the images, jscript, and libraries subdirectories, and then click **OK**.

Enabling HTTP Compression

If your Web site(s) use large amounts of bandwidth, or if you would like to more effectively use bandwidth, you may want to consider enabling HTTP compression. HTTP compression provides faster transmission time between compression-enabled browsers and IIS. Compression has no one-size-fits-all solution that enables all users to achieve the same results in different environments. However, there are some guidelines that may increase performance in terms of lighter network bandwidth at the expense of CPU and memory used by the IIS server.

You must be a member of the Administrators group on the local computer to enable compression.

Refer to one of the following sections as appropriate for your implementation:

- "IIS 6" in the following section.
- "IIS 7 with IIS 6 Compatibility" on page 48.

IIS 6

Use the following steps to enable HTTP compression on IIS 6.

To enable

1. Open IIS Manager, double-click the local computer, right-click the **Web Sites** folder, and then click **Properties**.
2. Click the **Service** tab, and in the **HTTP compression** section:
   a. Select the **Compress application files** check box to enable compression for dynamic files.
   b. Select the **Compress static files** check box to enable compression for static files.
   c. In the **Temporary directory** box, type or browse the path to a local directory.

      Once a static file is compressed, it is cached in this directory until it expires, or the content changes. The directory must be on the local drive. The directory cannot be compressed or shared, and the directory must include Full Control access to the identity of the application pool or to the IIS_WPG group.
   d. Under **Maximum temporary directory size**, select **Unlimited**.

      If you specify a maximum size, then when the limit is reached, IIS automatically cleans up the temporary directory by applying the "least recently used" rule.
3. Click **Apply**, and then click **OK**.
4. On the **Start** menu, point to **Programs**, point to **IIS Resources**, point to **Metabase Explorer**, and then click **Metabase Explorer**.

   HTTP compression requires the Internet Information Services (IIS) 6.0 Resource Kit Tools. For download information, go to www.microsoft.com and search on 6.0 resource kit tools.

5. In IIS Metabase Explorer, expand your server, expand **LM**, expand **W3SVC**, expand **Filters**, and then expand **Compression**.
   a. Select **deflate** and set the following values:
      - **HcDoDynamicCompression** = 1
      - **HcDynamicCompressionLevel** = 10
      - **HcFileExtensions** = htm,html,txt,css,xml,js
      - **HcScriptFileExtensions** = asp,dll,exe,aspx,ashx,asmx
   b. Select **gzip** and set the following values:
      - **HcDynamicCompressionLevel** = 10
      - **HcFileExtensions** = htm,html,txt,css,xml,js
      - **HcScriptFileExtensions** = asp,dll,exe,aspx,ashx,asmx
   c. Select **Parameters** and set the following Data values:
      - **HcDoDynamicCompression** = 1
      - **HcDoStaticCompression** = 1
      - **HcNoCompressionForHttp10** = 0
      - **HcNoCompressionForProxies** = 0
6. Close IIS Metabase Explorer.

IIS 7 with IIS 6 Compatibility

Use the following steps to enable HTTP compression on IIS 7 with IIS 6 compatibility.

By default, only static compression is enabled in IIS 7. Enabling dynamic compression will provide significantly smaller files over the network. In addition, there are a number of configuration elements that may be modified to provide more benefits. You may need to try different settings to achieve optimum results.

The following information can be used as a guide to implement compression in your Saleslogix implementation. To help evaluate and test your specific compression settings, you may want to use a third-party HTTP compression debugging tool.

To enable

1. Open IIS Manager, and select your Saleslogix Web site.
2. Under **IIS**, double-click **Compression**.
3. Select the **Enable dynamic content compression** check box.
   If necessary, enable the dynamic content compression module in Server Manager (Roles) to enable the check box.
4. In the **Actions** pane, click **Apply**.
5. If necessary, modify the **ApplicationHost.config** file using the following example. This file is stored in %SystemRoot%\System32\inetsrv\config\ApplicationHost.config.
   In IIS 7 the configuration file replaces the Metabase Explorer compression values used in IIS 6. For more information, see the Microsoft IIS Web site at http://www.iis.net/ConfigReference.
   - Example Configuration Settings:

```
<httpCompression directory="%SystemDrive%\inetpub\temp\IIS Temporary Compressed Files"
maxDiskSpaceUsage="500" noCompressionForHttp10="false" noCompressionForProxies="false"
>
<scheme name="gzip" dll="%Windir%\system32\inetsrv\gzip.dll"
dynamicCompressionLevel="10" staticCompressionLevel="10"/>
<scheme name="deflate" dll="%Windir%\system32\inetsrv\gzip.dll"
dynamicCompressionLevel="10" staticCompressionLevel="10" />
<staticTypes>
<add mimeType="text/*" enabled="true" />
<add mimeType="message/*" enabled="true" />
<add mimeType="application/*" enabled="true" />
<add mimeType="*/*" enabled="false" />
</staticTypes>
<dynamicTypes>
```

```
<add mimeType="text/*" enabled="true" />
<add mimeType="message/*" enabled="true" />
<add mimeType="application/*" enabled="true" />
<add mimeType="*/*" enabled="false" />
</dynamicTypes>
</httpCompression>
```

Configuring ASP.NET

Microsoft .NET Framework with ASP.NET enabled is required on the Web server and the required version is installed as a prerequisite to your Saleslogix installation. The Application Architect automatically configures the necessary portal settings, so no manual configuration steps are necessary.

Configuring Application Pool Permissions

You must configure the Application Pool Permissions for your Web Site. The default Web site is Saleslogix, unless you change it during the Web Host installation.

The recommended Identity for the Application Pool is configured for the WebDLL user. The WebDLL user is typically associated to the Saleslogix admin user to run the process orchestration and SData service portals. This association is set up in the Saleslogix Administrator.

See one of the following sections as appropriate for your server version.

To configure on Windows 2003 Server

1. Open **Internet Information Services (IIS) Manager**.
2. Expand the local computer, and then expand **Application Pools**.
3. Right-click **Saleslogix** (or the name of your Saleslogix Web Site), and then click **Properties**.
   The properties dialog box for your Saleslogix Web site application pool appears.
4. On the **Identity** tab, select the **Configurable** option.
5. In the **User name** box, type the **WebDLL** user name.
6. In the **Password** box, type the password for the **WebDLL** user.
7. Click **Apply**, and then click **OK**.
8. Restart the machine to apply the local security policies.

To configure on Windows 2008 and 2012 Server

1. Open **Internet Information Services (IIS) Manager**.
2. Expand the local computer, and then click **Application Pools**.
3. Right-click **Saleslogix** (or the name of your Saleslogix Web site), and then click **Advanced Settings**.
4. Under **Process Model**, select **Identity**, and then click the ellipsis button.
   The Application Pool Identity dialog box opens.
5. Select **Custom account**, and then click **Set**.
   The Set Credentials dialog box opens.
6. In the **User name** box, type the **Domain\WebDLL** user name.
   Ensure you include Domain\ in the user name.
7. In the **Password** and **Confirm password** boxes, type the WebDLL user's password.
8. Click **OK**, and then click **OK** again.

Configuring Permissions for Desktop Integration

You must set permissions for the Saleslogix Web site Libraries folder to enable Web Client users to download the Desktop Integration Module installation.

To set permissions on IIS 6

1. On the Web Host, open IIS Manager.
2. Expand your server, expand **Web Sites**, expand your Saleslogix Web site, and then expand the **SlxClient** folder.
3. Right-click the **Libraries** folder, and then click **Properties**.
4. Click the **Directory** tab.
5. In the **Execute permissions** drop-down list, select **Scripts only**.
6. Click **OK**.

To set permissions on IIS 7

No manual steps are required as the configuration is automatically set by the deployment.

Activating Outlook Sync

When Outlook Sync is activated, contacts and calendar items synchronize between Saleslogix and Microsoft Outlook. The Administrator must enable Outlook Sync functionality before users can install and configure it locally.

To activate

1. Log on to the **Saleslogix Web Client** as Administrator.
2. In the Navigation bar, click **SData Sync Configuration**.
   The Saleslogix Feed data should be populated by default.
3. Set up the SData feed:
   a. **Saleslogix Feed**: This box auto-populates with the information you enter into the fields below.
   b. **Use SSL**: Select if your implementation uses SSL. Strongly recommended for security
   c. **Port**: Accept the default (80) unless you changed the port used for the SData portal.
   d. **Data Portal**: Auto-populates with SData. This is the default, unless the name was changed in Application Architect when deploying the portal.
   e. **User Name**; Admin
   f. **Password**: Password for the Administrator user.
   g. **Display Name:** Type a name to identify the Saleslogix Feed.
   h. Click **Test Link**.
      If the test fails, verify the information entered in steps a through g.
4. On the **Integrations** tab, locate **Outlook Sync** and select the **Enabled** check box.
5. Click the **Save** icon.

Defining the Default Document

Default documents can be a directory's home page or an index page containing a site document directory listing. You must be a member of the Administrators group on the local computer to define a default document.

To define

1. In IIS, expand the **Web Sites** directory, and then expand the Web site where you deployed the Web Client portal.
2. Right-click the appropriate virtual directory, and then click **Properties**.
   For example, the virtual directory for the Web Client is SlxClient.
3. Click the **Documents** tab.
4. Ensure the **Enable default content page** check box is selected.

5. Click **Add** to add a new document to the list.
   The Add Content Document dialog box appears.
6. In the **Default Content page:** box, type the page name, and then click **OK**.
   For example, the default content page for the Web Client is Default.aspx.
7. Click **Move Up** to move the document to the top of the list.
8. Click **Apply**, and then click **OK**.

After completing this chapter...

You have completed tasks 1-12 in the "Web Tasks" checklist. Proceed with Chapter 6, "Configuring Saleslogix Users".

Chapter 6 | Configuring Saleslogix Users

Before beginning this chapter...

Add licenses and configure the system as described in Chapter 4, “Configuring the Saleslogix System”.

Use the instructions in this chapter to...

Create and configure Saleslogix users. These tasks are required for all Saleslogix installations.

When creating Saleslogix users, you must add new users and modify the user profile.

Planning for Saleslogix Users

Before adding new users, you can create departments, administrative roles, and security profiles that can be assigned to individual users. Administrative roles and security profiles help define what information is available to the user and what tasks they can perform.

For detailed steps to create departments, administrative roles, and security profiles, see the following topics in the Administrator help.

- Managing Administrative Roles
- Creating a Department
- Security Profile Manager

The Web Client also contains administrative features that allow users with the appropriate security access to manage competitors, departments, lead sources, literature items, pick lists, products, packages, users, teams, and Web security (roles).

For more information on the administrative features available in the Web Client, see the following Web Client help topics:

- Adding a User
- Working with Teams
- What are Roles and Secured Actions?

Understanding the Admin User

Saleslogix contains an Administrator user type which is the default user profile created for the system administrator. The system administrator has full access to all features and functions in the system when logging on as admin.

The Administrator user profile cannot be modified in Administrator with the same access as other Saleslogix users (Network, Remote, and so on). Access on the General tab is restricted except for the E-mail and Use Windows Authentication boxes and the Change Password button. The following tabs are not visible and cannot be edited:

- Service / Support
- Teams
- Sync

Admin user access is restricted to ensure the system administrator is not included in your company’s security model.

Creating Users

Before creating users, determine the best method of configuring the user's profile for your company's size and structure.

If you plan to add several users with identical profiles (for example, the same department, division, manager, security settings, and so on), Saleslogix recommends you use a user template. Templates are recommended because they significantly reduce administration time.

When creating users, you can apply a Saleslogix user template, or a custom template you create, which applies the appropriate settings to each user. User templates do not consume a license and cannot log on to Saleslogix.

The following options are available for adding users. See the appropriate topic in the Administrator Help to add users to your implementation.

Creation Method	Description	Administrator Help Topic
Add new users based on an existing user template	You can add new users based on an existing user template or a custom user template you create.	Creating a User Template
Create Saleslogix users based on existing Windows' users	If you want your existing Windows' users to also be Saleslogix users, you can import your Windows' user information to Saleslogix. During this process, you can select an existing user template to configure user profile settings.	Importing Windows Users/Matching Saleslogix Users to Windows Users
Import users from a comma-delimited text file	If your company maintains user information in another application, you can export the information and import it to Saleslogix to add users. During this process, a user template can be applied to configure user settings not found in the import file.	Importing Users from a CSV File
Create users individually	If you have a small number of users, or each user requires a distinct profile with settings that differ substantially, you can add users individually and configure each profile as appropriate.	Adding a User

Configuring Users

If you create a user from a template, from an existing Windows' user, or import the user information from another application, you must complete additional configuration steps before the user can log on.

If your installation includes Remote users, additional options are configured in Chapter 12, "Configuring the Saleslogix Remote Client". Remote user options cannot be configured until you complete various synchronization configuration steps.).

Use caution when assigning the Integrations role as it enables users to edit and add integrations without limits. User access to Integrations should be limited to Authentication Services and Sync History.

To configure

1. On the Administrator Navigation Bar, click **Users**.
2. In the **Users** view, double-click a user to open the profile.
3. If necessary, select the **Use Windows Authentication** check box. In the **Windows ID** box, select the name the user enters to log on to Windows.

   With Windows Authentication, users are automatically logged on without entering their Saleslogix user names or passwords.

4. In the **Username** box, type the name the user will use when logging on to Saleslogix.

   The user name is required and cannot contain spaces or an apostrophe. For Remote users, the user name must also follow the Rules for Regular Identifiers specific to the version of Microsoft SQL Server that you are using to create Remote databases. The Remote user name must follow these rules as it is sent to the Microsoft SQL Server or Microsoft SQL Express instance to be used as part of a Remote database name.
5. In the **Name** box, enter the user's name.

   If you selected the Update Saleslogix user information with Windows information check box on the Import Windows Users dialog box, the Username and Name boxes are pre-filled with Windows information. This information does not need to be changed.
6. In the **E-Mail** box, enter the user's e-mail address.
7. Select the **User is a Manager** check box if the user is a manager whose name should appear in the Manager list.
8. In the **User Type** box, select the user type.
9. Click the **Employee** tab.
10. If necessary, in the **Accounting ID** field, type the user's accounting identification code. (This is the ID used by the accounting software.)
11. Click the **Teams** tab.

    The Teams tab allows you to create user teams and add or remove the user from system teams. User teams allow users to access accounts owned by another user. For example, if you want Lee to have access to all Dan's accounts, you can add Lee to Dan's user team. System teams group users together so that all team members have access to the same accounts.
12. In the **User Team** section, click **Add** to add other users to this user's team.

    Users you add to this user's profile can access all accounts owned by the main user (the user whose profile you are editing).
13. In the **Field Security of selected user** box, select a security profile for the user selected in the User Team section. This profile only applies when accessing accounts owned by the main user (the user whose profile you are editing).

    Note Field security never applies to accounts owned by an individual when that individual is the user accessing the accounts.
14. Click the **Calendar** tab.

    The Calendar tab sets permission rights for users to view and modify other user's calendars.
15. In the **Other Calendars** section, click **Add Users** to set access for this user to add, edit, delete, or sync activities for another user.
16. In the **This User's Calendar** section, click **Add Users** to set access for other users to add, edit, delete, or sync activities to this user's calendar.
17. Click **OK**.

Setting Access to Customer Service Management

If necessary, you can give users access to management functions in the Saleslogix Client. If you are using customer service, you may want to allow users to manage options for ticket entry, time tracking, setting auto-assignment, managing area, category, and issue lists, user defaults, and ticket rates.

The following steps detail the options that can be set for customer service management. For details on other functions, see the "User Profile Function Security Tab" topic in the Administrator Help.

To set function security options

1. On the Administrator Navigation Bar, click **Users**.
2. In the Users view, double-click the user that you want to give access to customer service management options.
3. Click the **Function Security** tab, expand the **Tools** menu, and then expand the **Manage** menu.

4. Double-click the appropriate options to give access to this user:
   - **Customer Service Defaults** - Allows the user to access the Manage Customer Service Defaults dialog box which contains options for ticket entry and time tracking.
   - **AreaCategoryIssue** - Allows the user to manage the Area, Category, and Issue lists. Area, Category, and Issue lists are used to classify tickets and defects.
   - **Customer Service Options** - Allows the user to access the Manage Customer Service Options dialog box, which contains options for setting auto-assignment, User Defaults, and Ticket Rate options.
5. Click **OK**.

Setting Permissions for Integrations

Integrations allow communication between Saleslogix and external systems and services. In some cases, a user with administrative privileges must implement an integration before it can be available to users.

The ability to view Sync History is part of the Standard User role. If users require access to other Integrations actions, for example the ability to authorize an integration, Saleslogix recommends adding those actions to the Standard User role or creating a new role that includes those actions.

The Integrations role is not recommended for standard users. Once a user is assigned to the integrations role it is possible for that user to edit and add integrations without limits. User access to Integrations should be limited to Authentication Services and Sync History.

After completing this chapter...

You have completed tasks 15-16 in the "Required Tasks" checklist. Proceed to Part II: "Installing Saleslogix Clients".

Part II
Installing Saleslogix Clients

Chapter 7 | Installing Network Clients

Before beginning this chapter...

Create and configure users as described in Chapter 6, “Configuring Saleslogix Users”.

Note Use the instructions in this chapter to...

Install the Saleslogix Client for Network users. These tasks are required for all Saleslogix Network installations.

You can install the Saleslogix Client using one of two methods.

Automated installation Automated installations create an executable file that allows the Saleslogix Client to be installed with no user intervention.

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 (Network and\or Remote) directly by performing the “Build Saleslogix Network Client Install” or “Build Saleslogix Remote Client Install” and install the new image files over the previously-installed files. For new installations, the shortcut stored in the Image folder can be distributed to each machine. For upgrades, users can click on the existing shortcut on their desktops.

Note Store these files on a network share that is accessible by all client machines.

Standard Saleslogix Client installation The Saleslogix Client can be installed on each user’s computer using the Client installation. The standard installation includes Typical and Custom options which allow you to install all components or choose the components necessary for your implementation.

Creating Automated Client Installations

You can create automated installations of the Saleslogix Network and Saleslogix Remote Clients.

Note If you want to customize the standard configuration file or create your own configuration file, see Appendix E, “Automating Client Installations” for instructions.

Before creating automated installations, ensure you have access to a shared network folder in which you want to create the installs.

To create

1. On the **Saleslogix Installation** screen, click **Saleslogix Client Installations**.
2. On the **Saleslogix Client Installation** screen, click **Build Saleslogix Network Client Install** or **Build Saleslogix Remote Client Install**.
3. On the **Welcome** screen, click **Next**.
4. On the **Administrative Install Options** screen, enter the information as appropriate for your installation type, and then click **Next**.
   - Click **Modify default feature set** to change any of the features included in the install.
   - Select or clear the **Pre-configure Saleslogix Server connection** check box.

     Selecting this option allows you to configure the port for all installations, as well as the server and database alias for Network Client installations.

In the **Saleslogix Server** box, select or type the name of the computer on which you installed the Saleslogix Server.

- This setting is not available if you are creating a Saleslogix Remote Client installation.
- In the **Saleslogix Database Alias** box, select or type the name of the database connection.
- This setting is not available if you are creating a Saleslogix Remote Client installation.
- If necessary, in the **Port** box, change the port number used for communication between the client and the Saleslogix Server.

  In most implementations, the default port number does not need to be changed. However, if you have another application or service using port 1706, you should change the port number to an unused port.

5. In the **Network Location** box, type or browse to the location where the automated installation should be created. This location must be a shared network path.

   If you move the automated installation from this location at a later time, ensure you do the following:
   - Modify the shortcut created on the desktop to reference the new installation location. Redistribute the shortcut as necessary.
   - Modify the UNC paths within the configuration file to reference the new installation location.
6. On the remaining screens, click **Install** and **Finish** to complete the installation.

   The automated installation is created in the specified shared network location and a shortcut to the installation is created on the desktop.
7. Distribute the shortcut or installation to users.

Installing the Saleslogix Network Client

If your company uses Outlook Integration, ensure you have completed the required steps under “Outlook Integration Requirements” on page 20 before you install the Saleslogix Network Client.

Network Clients are the computers running Saleslogix that access the main database through a direct connection or wide-area network. Depending on your installation type, see the following instructions:

- If you created an automated installation, see “Performing an Automated Installation”.
- If you plan to use the standard installation, see “Performing a Manual Installation”.

Performing an Automated Installation

Installing the Saleslogix Client using an automated installation configures the Client computer with the settings selected when the installation was built.

When installing Saleslogix using an automated installation, third-party (prerequisite) applications are not installed. Third-party applications must be installed separately. Installations for these applications can be found in the Redist folder on the Saleslogix media.

To run an automated installation, instruct the user to double-click the client installation shortcut or custom Saleslogix Network Client.msi file. Shortcuts are typically distributed via e-mail and open the installation from a shared network drive.

After installation, you must start the Saleslogix Client. See “Starting the Saleslogix Client” on page 61 for details.

Performing a Manual Installation

Run a manual installation if you do not want to install some components.

To run

1. On the **Saleslogix Installation** screen, click **Saleslogix Client Installations**.

2. On the **Saleslogix Client Installation** screen, click **Install Saleslogix Network Client**.

   Note If the installation does not detect the necessary prerequisites, you will be prompted to install them. Click Install to allow Saleslogix to install the required components or Cancel to stop the installation.

3. On the **Welcome** and **License Agreement** screens, read the information and accept the agreement, and then click **Next**.
4. On the **Setup Type** screen, select an installation type, and then click **Next**.
   - Click **Complete** to install the most common components.
   - Click **Custom** to install only certain components or to change the installation location. Use the **Custom Setup** screen to enable or disable items for installation.

   Note When installing the Saleslogix Client on a Microsoft Window 8 operating system, you must run the setup.exe as Administrator. On Setup.exe, right-click and select “Run as Administrator.”

5. On the remaining screens, click **Install** and **Finish** to complete the installation.
6. After installation, you must start the Saleslogix Client.

Starting the Saleslogix Client

Before starting the Saleslogix Client on Oracle, you may need to create a Client database connection on each Client computer. See “Creating Client Database Connections for Oracle” on page 31 for instructions.

After installation, the user who installed Saleslogix must log on to the Client computer(s) for the first time and launch each of the following applications. This process creates the necessary registry entries for each application.

- If the standard user has installation rights, he or she can log on and begin using the Saleslogix Client.
- If the standard user does not have rights to install Saleslogix, an admin user must start the Client application. This is because the Saleslogix Client must write to restricted areas of the registry. After an admin user has logged on and run the Client, a standard user can read from the registry’s restricted area.

Note The Saleslogix installation creates connection information in the Current User area of the registry. Therefore, if the user logging on to the Client is not the user who installed the Client, a new database connection must be created.

Creating Area, Category, and Issue Lists

Before users begin working with tickets and defects, you must create custom lists for the Area, Category, and Issue fields. The Area, Category, and Issue lists contain information specific to your company that is used to describe the problem or issue documented by a ticket or defect.

The Area, Category, and Issue lists are linked in a hierarchy. The Area you select determines the options available for the Category, and the Category you select determines the options available for the Issue.

The Area, Category, and Issue lists are used to reduce administration time when users are creating tickets and defects. If you are not using the customer service or support features, you do not need to create the Area, Category, and Issue lists.

To create

1. On the Saleslogix Client **Tools** menu, point to **Manage**, click **Customer Service Options**, and then click the **Area/Category/Issue** tab.
2. Click **Add**.
3. In the **Area** box, type a short description (limited to 64 characters) for an area value that is applicable to your company's business. For example, you could type "Software".

   The Area provides a high-level description of the customer’s problem (on a ticket) or the type of defect.
4. In the **Category** box, do one of the following:

- Select a category that is appropriate for the area.
- Type a short description (limited to 64 characters) for a category that is appropriate for the area. For example, in Step 3 you created the Area of Software, so the Category might be the name of the software manufacturer.

The Category value provides more detailed information about the cause of the customer's problem and is grouped with a specific Area value.

5. In the **Issue** box, do one of the following:
   - Select an issue value that is appropriate for the category.
   - Type a short description (limited to 64 characters) for an issue.

   The Issue value provides even more detailed information about the customer's problem and is grouped with a specific Category value.
6. Select the **Ticket** check box if you want the items to be available in the Saleslogix Client and Web Client Ticket views.
7. Select the **Defect** check box if you want the items to be available in the Defect view.
8. Select the **Customer Portal** check box if you want the items to be available in the Customer Portal Ticket view.
9. Click **OK**.
10. If necessary, select the **Issue text must match a list item** check box on the **Area/Category/Issue** dialog box.

    When this option is selected, the user must type or select an Issue that already exists. When cleared, a user can type a new value in the Issue box in the Saleslogix Client and Web Customer Portal.
11. Repeat steps 2-10 as necessary to create all area, category, and issue values for your company.
12. Click **OK**.

Creating the SyncSaleslogix Group

If your implementation includes Standard Outlook Integration or Outlook Sync, you must create an ad hoc group. Contacts in this group synchronize between Saleslogix and your Outlook. You can give the group any convenient name. The name used in these instructions is SyncSalesLogix.

To create

1. Open the Saleslogix Client.
2. Open the Contacts List view.
3. Select the contacts you want to synchronize with Microsoft Outlook.
4. Right-click the selected contacts, and then click **Add Selected Members to New Group**.
5. In the Query Builder **Name** box, type *SyncSaleslogix*.
6. In the **Display Name** box, type *SyncSaleslogix*.
7. Click **OK**.
8. Click **Close**.

Assigning the SyncSaleslogix Group

After creating the SyncSaleslogix group, you must specify that group to be used to transfer information between Microsoft Outlook and Saleslogix.

To assign

1. On the Saleslogix **Tools** menu, click **Options**.
2. Click the **Lookups and Groups** tab.
3. In the **Sync Configuration** section, click **New**.
4. In the **Contact Sync Group** dialog box, click **Choose Group**.
5. Select **SyncSaleslogix**, and then click **OK**.
6. Click **OK**.

Configuring Outlook Sync

If your implementation includes Outlook Sync, notify each Saleslogix Client user that they will be prompted to configure Outlook Sync using the Saleslogix Connector the first time they open Microsoft Outlook. See the Saleslogix Connector help for more information.

After completing this chapter...

You have completed tasks 17-22 in the "Required Tasks" checklist.

If your implementation includes the Web Client, proceed with Chapter 8, "Configuring the Web Client"

If your implementation does not include the Web Client but does include remotes, proceed with Chapter 11, "Configuring Synchronization".

Chapter 8 | Configuring the Web Client

Before beginning this chapter...

Install and configure the Web Host as described in Chapter 5, “Installing the Web Components”. In addition, restart all servers involved in the implementation.

Use the instructions in this chapter to...
Configure the Saleslogix Web Client. These tasks are required for all Saleslogix Web installations.

The Saleslogix Web Client is highly customizable using the Application Architect. You can rapidly build, customize, manage, and deploy coded and codeless Web application solutions. After building and deploying the Web Client, you must configure various settings on the Host and Client computers.

For more information, refer to the “Common Tasks in Application Architect” topic in the Application Architect help.

Configuring Windows Authentication

Windows Authentication allows Web users to automatically log on to the Web Client using their Microsoft Windows logon credentials. This method uses a cryptographic exchange with the user's Web browser to confirm the identity of the user.

When Windows Authentication is enabled:

- Users do not see a Saleslogix Web Client log on page.
- To enable users to log on as the administrator, you must configure a second Web Client implementation that does not include Windows Authentication.

Ensure the Use Windows Authentication check box is selected on the User Profile General tab for each Web Client user. For more information see “Configuring Users” on page 54.

To configure Windows Authentication you must:

- Configure the WebDLL user
- Configure your Web Server
- Configure your Web Client computers

The following instructions configure Windows Authentication for Web Client users to prevent logging on manually if the Windows user is not mapped to a user in Saleslogix. This method is referred to as “Forms”. It attempts to log the user on automatically but displays an error message if the user information is not found. For additional configuration scenarios, see the “Enabling Windows Authentication Access for Web Client Users” topic in the Administrator Help.

Configuring the WebDLL User for Windows Authentication

You must configure the WebDLL user for Windows Authentication to allow the Saleslogix Web Client to open a connection to the Saleslogix database. If you have not already completed this task, see the steps in Chapter 5, “Installing the Web Components”.

Configuring the Web Server

Use one of the following sections to configure Windows Authentication on your Web Server.

- “Windows 2003” in the following section.
- “Windows 2008 or 2012” on page 67.

Windows 2003

The following instructions configure Windows Authentication for Web Client users on Windows 2003.

Note Windows Authentication requires the setspn.exe. For download information, go to www.microsoft.com and search on Windows 2003 Support Tools.

To configure

1. On the Web Server computer, log on as a domain administrator or as a user with rights to modify the Active Directory.

   This user should be the Application Pool user.
2. Add permissions for Web Client users or groups.
   a. In IIS, right-click the **Application Pools** folder, and then click **Properties**.
   b. Click the **Identity** tab.
   c. Verify that the user indicated in the **User name:** box is the user logged in as the domain administrator or user with rights to modify the Active Directory.
3. Run setspn.exe to manually modify the service account's SPN information to run correctly with Windows Authentication.

   Service Principal Names (SPNs) are used to locate a target principal name for running a service. The setspn.exe is included in the Windows 2003 Support Tools.
   a. Open a Command Prompt window.

      Note Do not use a colon or second forward slash in the following setspn commands. Type the commands exactly as documented.

   b. At the command prompt, type the following command. setspn -A http/server.domain.com domain\username

      The server.domain.com is the fully qualified machine name, the domain is the Saleslogix domain, and the user name is the user that has rights to modify the active directory (this is the user specified in the application pool). Use the username created in “Configuring Application Pool Permissions” on page 49.
   c. At the command prompt, type the following command. setspn -A http/server domain\username

      The server is the machine name, the domain is the Saleslogix domain, and the user name is the user that has rights to modify the active directory. Use the username created in “Configuring Application Pool Permissions” on page 49.
   d. At the command prompt, type the following command. setspn -L username

      This step checks to ensure the SPN entries created in steps b and c have been registered correctly. If you do not see the two entries, repeat steps b and c.
4. On the Web Server computer, add IIS permissions for Web Client users or groups.
   a. Open **Internet Information Services (IIS) Manager**.
   b. Expand the Web Server computer name, expand **Web Sites**, and then expand the name of the Web site where you deployed the Saleslogix Web Client portal.
   c. Right-click **SlxClient**, and then click **Permissions**.
   d. On the **Security** tab, click **Add**.
   e. In the **Select Users or Groups** dialog box, add your Web Client domain users, and then click **OK**.
5. On the Web Server computer, enable Windows Authentication for the Web Client using the following method to restrict Web Client users from logging on if the Windows user is not mapped to a Saleslogix.
   a. Open **Internet Information Services (IIS) Manager**.

b. Expand the Web Server computer name, expand **Web Sites**, and then expand the name of the Saleslogix Web Client Web site.
c. Right-click **SlxClient**, and then click **Properties**.
d. In the **Properties** dialog box, click the **Directory Security** tab.
e. In the **Authentication and access control** section, click **Edit**.
f. Ensure the **Enable anonymous access** check box is selected.
g. Ensure the **Integrated Windows authentication** check box is selected.
h. Click **OK**.
i. Modify the Web.config file.
   - In Application Architect, make the following edits in the web.config file in the Saleslogix portal. For more information about editing the web.config file see the "Editing Configuration Files" topic in the Application Architect Help.
   - Modify the web.config file by commenting out the sections labeled **Windows Authentication – off** and removing the comment markup from the sections labeled **Windows Authentication – on**.
   - The three sections that must be modified are the **<authentication>**, **<httpModules>**, and **<modules>**.
     Comment markup begins with "<!--" and ends with "-->"
j. (Optional) Remove the Saleslogix Log on screen.
   When a user logs off from Saleslogix, a log on button displays that allows the user to log back on. To remove this button, you must edit the Logoff.aspx file.
   Change the line:

```
<div id="LogoffFormButtonPanel"><a href="~/Login.aspx" id="loginLink"
runat="server"><%= GetLocalResourceObject("ReturnToLoginMessage") %></a></div>
```

   To

```
<div id="LogoffFormButtonPanel"><a href="~/Default.aspx" id="loginLink"
runat="server"><%= GetLocalResourceObject("ReturnToLoginMessage") %></a></div>
```

6. Enable Integrated Authentication for SData Portal Configuration
   a. Open **Internet Information Services** (IIS) Manager.
   b. Expand the Web Server computer name, expand **Web Sites**, and then expand the name of the Saleslogix Web Client Web site.
   c. Right-click your SData virtual directory, and then click **Properties**.
   d. In the **Properties** dialog box, click the **Directory Security** tab.
   e. In the **Authentication and access control** section, click **Edit**.
   f. Clear the **Enable anonymous access** check box.
   g. Select the **Integrated Windows authentication** check box.
   h. Click **OK**.
   i. Under the **SData** folder, open and modify the **Web.config** file.

Windows 2008 or 2012

The following instructions configure Windows Authentication for Web Client users on Windows 2008.

To configure

1. On the Web Server computer, log on as a domain administrator or as a user with rights to modify the Active Directory.
   This user should be the Application Pool user.
2. Add the WebDLL user to the IIS_IUSRS group.
3. Make sure all Saleslogix Web Client users who will be using Windows Authentication have the following permissions to the SLXClient and SData folders:
   - Read
   - Write
   - Execute

4. Add Windows Authentication security.
   a. In the Server Manager, under **Web Server (IIS)**, click **Add Role Services**.
   b. In the tree view under **Security**, select **Windows Authentication**.
   c. Click **Install**.
5. Run setspn.exe to manually modify the service account's SPN information to run correctly with Windows Authentication.

   Service Principal Names (SPNs) are used to locate a target principal name for running a service. The setspn.exe is included in Windows 2008.
   a. Open a Command Prompt window.

      Note Do not use a colon or second forward slash in the following setspn commands. Type the commands exactly as documented.

   b. At the command prompt, type the following command. setspn -A http/server.domain.com domain\username

      The server.domain.com is the fully qualified machine name, the domain is the Saleslogix domain, and the user name is the user that has rights to modify the active directory. Use the username created in "Configuring Application Pool Permissions" on page 49.
   c. At the command prompt, type the following command. setspn -A http/server domain\username

      The server is the machine name, the domain is the Saleslogix domain, and the user name is the user that has rights to modify the active directory. Use the username created in "Configuring Application Pool Permissions" on page 49.
   d. At the command prompt, type the following command. setspn -L username

      This step checks to ensure the SPN entries created in steps b and c have been registered correctly. If you do not see the two entries, repeat steps b and c.
6. On the Web Server computer, enable Windows Authentication in IIS. This method restricts Web Client user from logging on if the user is not found in Saleslogix.
   a. Open IIS Manager, and click **Advanced Settings**.
   b. In the **Advanced Settings** dialog box, click the **Physical Path Credentials** ellipsis.
   c. In the **Connect As** dialog box, select **Application user (pass-through authentication)**, and then click **OK** twice.
   d. Double-click **Authentication** and verify that only **Windows Authentication** is enabled.

      By default, Saleslogix uses Basic Authentication.
   e. Right-click **Windows Authentication**, and then click **Edit**.
   f. Click **Advanced settings**.
   g. Ensure that the **Enable Kernel-mode authentication** check box is not selected.
   h. Click **OK.**
   i. Modify the Web.config file.
      - In Application Architect, make the following edits in the web.config file in the Saleslogix portal. For more information about editing the web.config file see the "Editing Configuration Files" topic in the Application Architect Help.
      - Modify the web.config file by commenting out the sections labeled **Windows Authentication – off** and removing the comment markup from the sections labeled **Windows Authentication – on.**
      - The three sections that must be modified are the **<authentication>**, **<httpModules>**, and **<modules>**.

        Comment markup begins with "<!--" and ends with "-->"
   j. (Optional) Remove the Saleslogix Log on screen.

      When a user logs off from Saleslogix, a log on button displays that allows the user to log back on. To remove this button, you must edit the Logoff.aspx file.

      Change the line:

      ```
      <div id="LogoffFormButtonPanel"><a href="~/Login.aspx" id="loginLink"
      runat="server"><%= GetLocalResourceObject("ReturnToLoginMessage") %></a></div>
      ```

      To

      ```
      <div id="LogoffFormButtonPanel"><a href="~/Default.aspx" id="loginLink"
      runat="server"><%= GetLocalResourceObject("ReturnToLoginMessage") %></a></div>
      ```

7. Enable Windows Authentication for the SData Portal.
   a. Open **Internet Information Services (IIS) Manager**.
   b. Select the **SData** virtual directory, and click **Advanced Settings**.
   c. In the **Advanced Settings** dialog box, click the **Physical Path Credentials** ellipsis button.
   d. In the **Connect As** dialog box, select **Application user (pass-through authentication)**, and then click **OK**.
   e. Click **OK** to close the Advanced Settings dialog box.
   f. Double-click **Authentication** and set the following:
      - Disable anonymous access.
      - Enable Windows Authentication.
      - Enable Basic Authentication

        By default, Saleslogix uses Basic Authentication.
   g. Right-click **Windows Authentication**, and then click **Advanced Settings**.
   h. In the **Advanced Settings** dialog box, verify that **Enable Kernel-mode authentication** is not selected, and then click **OK**.
   i. Under the **SData** folder, open and modify the **Web.config** file.

Configure the Web Client Machines

The following instructions configure Windows Authentication for Web Client users accessing Saleslogix. Use one of the following procedures as appropriate for your browser type.

To enable on Internet Explorer

1. On each Web Client computer, open your browser.
2. On the **Tools** menu, click **Internet Options**.
3. Click the **Security** tab, select **Trusted Sites**, and then click **Sites**.
4. In the **Add this Web site to the zone:** text box, enter either the Web Server name or the IP address to the Web Server (http://10.40.0.35).

   Note For users using Windows Authentication, the URL address must include the windows.aspx page (http://10.40.0.35/slxclient/windows.aspx).

To enable on Firefox

1. On each Web Client computer, open your browser.
2. In the **Location Bar**, type *about:config*, and then press **Enter**.
3. If a warranty message opens, click **I'll be careful, I promise!**.
4. Double-click the **network.automatic-ntlm-auth.trusted-uris** preference.
5. In the **Enter string value** box, type your Web Host URL using the format http://hostserver:port.
6. Click **OK**.

Configuring Roles

A role determines what functionality a user can access in the Web Client. Roles use secured actions to control access to user interface elements such as pages, menus, menu items, toolbars, and buttons. When you control access to individual user interface elements, you can control access to actions such as editing, deleting, or printing.

By default, users created in the Web Client are assigned the Standard User role. This role allows add, edit, and delete permissions to Web Client non-administrative entities such as accounts, contacts, and opportunities.

Users created in the Administrator are not assigned a role and role security cannot be set in the Administrator. If you create new Web Client users in the Administrator, you must assign users to the Standard User role.

To assign

1. Open the **Users List** view in the Web Client.
2. Select the users that should have add, edit, and delete permissions to non-administrative entities in the Web Client.
3. In the User Tasks pane, click **Add to Role**.
4. In the **Select Role** dialog box, lookup and select the **Standard User** role, and click **OK**.
5. Click **OK**.

Review the “What are Roles and Secured Actions?” topic in the Web Client help to understand the default roles and how you want to apply them to users.

Testing the Web Site

After you have deployed a Web portal and defined the default document, you are ready to test the Web site.

To test

1. Ensure the following services are running on the Web Host: Indexing Service, IIS Admin Service, and World Wide Web Publishing Service.
2. Reset IIS.
3. Depending on where you deployed the Saleslogix Client portal, use one of the following URLs to test the Web site. If you deployed the Saleslogix Client portal to:
   - *localhost (your Web server)*, the format is *http://localhost/SlxClient* or *http://server/SlxClient*.
   - *localhost (your Web server)* with Windows Authentication enabled, the format is *http://server:port/SlxClient/Windows.aspx*.
   - a Web site and port you designated during Web Host installation, or to another Web site you created manually in IIS, the format is *http://server:port/SlxClient*.

     The server is the Web Host server and port is the port number you designated during Web Host installation.
4. When the Saleslogix Web Client logon page appears, enter your **User Name** and **Password**.
5. (Optional) Saleslogix Web components provide optional extended features in the Web Client that may require additional components to be downloaded.
   - On the login screen, click **Enhance Saleslogix**.
   - In **Options**, click the **General/Search** tab and click **Enhance Saleslogix**.
   - If prompted to install Saleslogix Desktop Integration and you want to use this feature, click **Yes**.
6. Click **Log On**.
7. Log off the Saleslogix Web Client.
8. Send the Web Client URL to users or create a link from your company’s Web site (detailed in the following section).

Linking from Your Company’s Web Site

When you are ready to make the Web Client accessible to users, you can create a link on your company’s Web site (typically an intranet site) to provide access. For example, you may want to display a link that reads “Saleslogix” in a prominent location on your intranet site.

Create the link in the following format:

<A HREF=”*webservername/virtualdirectoryname*”>Saleslogix</A>

The server is the name of your Web Host machine. The virtual directory name is *SlxClient*, unless you specified a different name in the Saleslogix Web portal Deployment Properties in Application Architect.

Configuring Client Computers

To ensure the Web Client functions correctly, you must configure several options on each user's computer.

To configure

1. Ensure the user is a member of the local Power Users or Administrators group.
   This allows ActiveX controls to work correctly if this user enables and downloads extended features on the Web Client Log On page.
2. Ensure the Scrollbar Item setting is set to 17 or less.
   - (XP/2003) The Scrollbar option is set in the Control Panel > Appearance and Themes > Display properties Appearance tab > Advanced > Item drop-down menu.
   - (Vista/7/2008) The Scrollbar option is set in the Control Panel > Personalization > Window Color > Window Color and Appearance > Item drop-down menu.
3. The default browser settings should be used for the Saleslogix Web site. In addition to your browser defaults, the following options are required.

The option locations and wording may vary depending on your browser version. For more information on these options, refer to your browser's Help.

Browser Option	Setting
Internet Explorer	
Temporary Internet Files>Settings	Check for newer versions of stored pages **Automatically**.
Security>Trusted sites>Sites	• Add the Saleslogix Web site (SlxClient) to the trusted sites list. Type http:// followed by the Web Host server name for the Web Client site (for example, **http://server**). • Turn OFF protected mode for trusted sites (Vista/7/2008). • Enable **Script ActiveX controls marked safe for scripting**. • Enable (or set to prompt) **Initialize and script ActiveX controls not marked safe for scripting**.
Security tab	• Enable **Drag and drop or copy and paste files** (Allow access to the clipboard).

Enabling UTF-8 Support for Internet Protocols

(Microsoft Office 2007) If users export extended characters from Saleslogix to e-mail, UTF-8 support must be enabled.

To enable

1. Open Microsoft Outlook.
2. On the **Tools** menu, click **Options**.
3. Click the **Mail Format** tab, and then click **International Options**.
4. Under **Internet Protocols**, select **Enable UTF-8 Support**.
5. Click **OK**.

Installing Desktop Integration

Desktop Integration extends Saleslogix Web Client functionality by downloading client-side files for the following features:

- Office Integration encompasses Mail Merge and Drag and Drop functionality. Administrators can also drag-and-drop library files.
- Outlook Integration encompasses SendSLX, Record to History, SLX Address book, Insert Library item, Insert vCard, Insert Contact vCard, and Outlook Sync.

Note
- Office Integration is not supported if your installation of Microsoft Office is 64 bit.
- When installing Desktop Integration with Office 2007, the user must be logged on with Administrative rights.
- Available functionality may be restricted by the browser type or version. For full Desktop Integration support, use IE 9. 10 or 11. For limitations of other browsers see the Compatibility Guide.

Before users install and configure these features, ensure you configured SData as detailed in “Configuring the SData Portal” on page 45.

To install and configure

1. Open the Web Client login screen.
2. Click **Install Enhancements**.
3. Do one of the following:
   - Click **Run** to install Desktop Integration from it’s current location.
   - Click **Save** to save the install locally before running it.
4. Follow the steps in the Wizard.
5. At the **Setup** Type screen, select one or both of the following:
   - Office Integration
   - Outlook Integration.

   Both options are selected by default. In the Custom Setup screen, click the down arrow to the left of the feature you do not want to install and then click **This feature will not be available**.
6. Continue to follow the prompts in the wizard.
7. At the end of the installation, click **Finish**.
8. After installing, you must open the Desktop Manager and configure it with the appropriate portal information. Click the **Find out more** link to open the “Installing and Using Saleslogix Desktop Integration” help topic for browser specific configuration information.

Note Users can also install Desktop Integration from the link located in the Saleslogix Web Client, in User Options, on the General tab.

Creating the SyncSalesLogix Group

If your implementation includes Standard Outlook Integration or Outlook Sync, you must create an ad hoc group. Contacts in this group synchronize between Saleslogix and your mail application. You can give the group any convenient name. The name used in these instructions is SyncSalesLogix.

To create

1. Open the Web Client Contact List view.
2. Select the contacts you want to synchronize with Microsoft Outlook.
3. Right-click the selected contacts, and then click **Save Records as Group**.

   The Add Records to new Group dialog box opens.
4. In the **Group Name** box, type *SyncSalesLogix*.

5. Click **OK**.

Configuring Outlook Sync

If your implementation includes Outlook Sync, notify the Web Client users to install Desktop Integration and configure Outlook Sync.

Installing Desktop Integration is an option available to all Saleslogix Web Client users from the log on screen. Some features are browser-dependent, so review the Compatibility Guide available on the Support portals for full information.

After installing Desktop Integration, each user must configure Outlook Sync and will be prompted to do so using the Saleslogix Connector the first time he or she opens Microsoft Outlook. See the Saleslogix Connector help for more information.

When installing Desktop Integration with Office 2007, the user must be logged in with Administrative rights

.

After completing this chapter...

You have completed tasks 11-16 in the "Web Tasks" checklist. If your implementation includes:

- The Mobile Client: proceed with Chapter 9, "Configuring the Saleslogix Mobile Client".
- Customer Portal: proceed with Chapter 10, "Configuring Saleslogix Customer Portal".
- Remotes: proceed with Chapter 11, "Configuring Synchronization".

Otherwise, you can begin using Saleslogix.

Chapter 9 | Configuring the Saleslogix Mobile Client

Before beginning this chapter...

Install and configure the Web Host and the SData portal as described in Chapter 5, “Installing the Web Components”. In addition, restart all servers involved in the implementation.

Use the instructions in this chapter to...

Configure the Saleslogix Mobile Client. These tasks are required for all Saleslogix installations that include the Mobile Client.

Understanding the Mobile Client

Saleslogix Mobile provides secure, reliable mobile access to Saleslogix information when using mobile devices with internet browsers that support HTML5 and CSS3.

For data security, make sure your Saleslogix Web Server has a valid Secured Sockets Layer (SSL) security certificate installed. You can use the Web Server where you deployed your Saleslogix Client portal.

Deploying the Saleslogix Mobile Client Portal and the SData Portal

See “Deploying a Saleslogix Web Portal” on page 43 for detailed steps to deploy the SLX Mobile and SData portals.

Defining the Default Document

Default documents can be a directory’s home page or an index page containing a site document directory listing. The default document for the Saleslogix Mobile Client portal landing page is index.html, and should have been added to the documents list on the IIS Web site by the installation. If your URL <https://YourSlxWebServer/SlxMobile> is not defaulting to call the index.aspx, you may want to define it manually.

See “Defining the Default Document” on page 50 for detailed steps to define the default document.

Testing the Mobile Web Site

Use the same procedure to test the Web site as you did for the Web Client (as explained in “Testing the Web Site” on page 70); however, modify the URL as follows:

http://*localhost*/*SlxMobile*

If you deployed the Saleslogix Mobile Client portal to a different Web site in IIS, use the following format:

http://servername:port/SLXMobile

Before installing the Saleslogix Mobile Client portal, make sure your environment meets the following requirements:

- Saleslogix is installed and has a functioning Web environment.
- The Web Server has a valid Secured Sockets Layer (SSL) security certificate installed. You can use the Saleslogix Web Server where you deployed your Saleslogix Client portal.

- The SData portal has already been deployed successfully.

  To confirm that SData is set up correctly, type the following URL into your browser:

  http://<servername>/sdata/$system/adapters. Enter the user credentials of the Saleslogix user that SData is configured under (for example, Admin). The adapters page Saleslogix Mobile v1.2 Implementation Guide should load and list the available feeds.

Sending the Saleslogix Mobile Client Portal URL to Users

Send the Saleslogix Mobile Client portal URL to mobile users through email. Your users click the URL or type it into a compatible browser on a desktop computer, mobile device, or tablet computer. Any Saleslogix user can access Saleslogix information from his or her compatible mobile device by clicking the portal link. No specific user configuration is needed.

For security purposes, make sure you set up SSL encryption on the server and access the client using HTTPS. An example URL is: https://YourSlxWebServer/SlxMobile.

The browser may ask users if it is OK to store data on their computer for offline use. This is expected, as the mobile application is cached on the computer for improved performance. After the application has been cached, the user can quickly move from screen to screen because only data needs to be transferred over the wire from the SData portal.

For more information, refer to the “Common Tasks in Application Architect” topic in the Application Architect help.

Using Saleslogix Mobile with Windows Authentication

When Windows Authentication is implemented, users will still see a log on screen when they open the Saleslogix Mobile Client**.**

Remember you must enable Windows Authentication on the SData portal.

To configure Windows Authentication for Mobile:

1. After installing, building and deploying the Saleslogix Web Client and SData portals:
   a. Configure Windows Authentication for the Web Client:
      i. Configure the WebDLL user. See “Configuring the WebDLL User for Windows Authentication” on page 53.
      ii. Configure your Web Server for Windows Authentication. Be sure to complete the steps for the SData portal. See “Configuring the Web Server” on page 76.

      Alternatively, you can follow the instructions in the Administrator help. See the topic called ‘Configuring Windows Authentication for Windows Server (select either for 2008 or 2003).
   c. Deploy the Mobile and SData portals. See ““Deploying a Saleslogix Web Portal” on page 43.
   d. In the Administrator, open the User Profile General tab for each Saleslogix user who will also be a Mobile Client user. This could be a Network, Web, Remote, or Concurrent user. Make sure that the Use Windows Authentication check box is selected. See the topic called “User Profile General Tab” in the Administrator help for more information.
   e. Ensure that the Saleslogix user is associated to a Windows Domain user.

2. Instruct users to use the fully-qualified domain name when they log on to Saleslogix Mobile.
   To authenticate with Windows Active Directory when logging into the Mobile portal, you must supply the fully-qualified domain name and windows password in the logon dialog. For example:
   user name: testcorp\lee.hogan
   password: <Lee Hogan's windows password on testcorp domain>.

Note To mitigate the need to supply a fully-qualified domain name, change the IIS basic authentication settings for SData authentication to supply a default domain.

After completing this chapter...

You have completed steps 1 to 4 in the "Mobile Client Tasks" checklist. If your implementation includes:

- Customer Portal: proceed with Chapter 10, "Configuring Saleslogix Customer Portal".
- Remotes: proceed with Chapter 11, "Configuring Synchronization".

Otherwise, you can begin using Saleslogix.

Chapter 10 | Configuring Saleslogix Customer Portal

Before completing this chapter...

Install and configure the Web Client as described in Chapter 8, “Configuring the Web Client”.

Use the instructions in this chapter to...

Configure and deploy Saleslogix Customer Portal. These tasks are required for installations that include Saleslogix Customer Portal.

Customer Service and Saleslogix Customer Portal extend Saleslogix customer service features onto the Web for employees and customers.

Understanding Customer Service

Customer Service features in the Saleslogix Web Client allow employees to add or update tickets, track their time as ticket activities for processing and resolving tickets, create calendar activities for tickets, add related ticket information, access SpeedSearch to find solutions to customers’ problems, and run reports. Customer Service is enabled for all named users by default.

Understanding Saleslogix Customer Portal

Saleslogix Customer Portal enables you to provide customers with user names and passwords so that they can view information about existing tickets, create new tickets, and change the status of tickets. Customers can also access SpeedSearch to find solutions. Customers are granted permissions to Saleslogix Customer Portal by an internal Saleslogix user.

Saleslogix Customer Portal features require:

- Saleslogix Advanced License
- Saleslogix Customer Portal License
- Additional configuration in Administrator and Application Architect.

Before you configure Saleslogix Customer Portal, ensure:

- The Web Host is installed and configured according to Chapter 5, “Installing the Web Components”.
- SpeedSearch Server is installed and configured on the same server as the Web Host or on a separate server.
- Employees who use Customer Service are active Saleslogix users (not WebViewer users).
- Users who access Saleslogix Customer Portal have the same hardware, browser, and configuration as users who access the Web Client.

Adding the Saleslogix Customer Portal User

Saleslogix Customer Portal requires a generic, named Saleslogix user. This user may be set up as a Named Web User or Concurrent User. In addition, the user **must** be a member of every team, and every user's team, so that customers can access records owned by all teams.

Note The admin user can be used for Saleslogix Customer Portal if you do not want to create a separate named user.

To add

1. On the Administrator Navigation Bar, click **Users**.
2. Click the **Add** button on the toolbar.
3. In the **Add Users** dialog box:
   a. In the **Add** box, select **Named Web** or **Concurrent User.**
   b. In the **Quantity** box, ensure **1** appears.
   c. Ensure the **Create Profile From** check box is cleared.
   d. Click **OK**.
   The User Profile for <NewUser> dialog box appears.
4. On the **General** tab:
   a. In the **Username** box, type **customerportal** (one word).
   b. In the **Name** box, type **Customer Portal**.
   c. Ensure the **Login Active** check box is selected.
   d. In the **Department** box, select a department for this user.
   This can be any department.
   e. Verify the **User Type** is **Named Web** or **Concurrent User**.
5. On the **Teams** tab:
   a. In the **Teams** area, click **Manage**.
   b. In the **Teams** dialog box, select each team. Ensure you have selected all teams.
   c. Click **OK**.
6. Click **OK**.
   The new Saleslogix Customer Portal user appears in the Users grid.

Setting User Security

Saleslogix Customer Portal requires a Web access user, which permits users who are not named Saleslogix users to access parts of Saleslogix functionality. The Web access user uses the permissions of the named Saleslogix Customer Portal user (customerportal) to perform certain actions, and records any history, logs, and so on to that user name.

To set

1. On the Application Architect **Tools** menu, click **Web User Security**.
2. In the **Select a Web Access User** list, select *Portal, Customer*.
   If you are using a different user name for the Saleslogix Customer Portal user, set the value to that name; however, make sure that user name has been configured as instructed in "Adding the Saleslogix Customer Portal User" on page 80.
3. Click **OK**.
4. On the **Build** menu, click **Build Web Platform**.

Deploying the Saleslogix Customer Portal

See "Deploying a Saleslogix Web Portal" on page 43 for detailed steps to deploy Saleslogix Customer Portal.

Configuring the Saleslogix Customer Portal

Additional configuration for SpeedSearch indexes and Web access is required for Saleslogix Customer Portal.

Configuring SpeedSearch Indexes for Customer Access

To make SpeedSearch indexes available to customers so that they can search for information, ensure you have given Customer access to each index under the Public Access setting. If you have already assigned Customer access to indexes when you originally set them up, disregard this section.

To configure

1. On the Administrator **Manage** menu, click **SpeedSearch Indexes**.
2. In the **Manage SpeedSearch Indexes** dialog box, select an item under **Index Name** that you want to allow customers to access, and then click **Edit**.
3. In the **SpeedSearch Index Definition** dialog box, under **Public Access**, select **1- Customer**.

   Internal employees can still access this index when Public Access is selected.
4. Click **OK**.
5. If necessary, continue selecting indexes and editing the Public Access for each one.

Enabling the Contact Web Access Tab

By default, only the system administrator can grant contacts access to Saleslogix Customer Portal. However, you can give certain employees who use Customer Service this ability as well. When employees have this access, they can see the Web Access tab in the Contact Detail view within Saleslogix Network Clientand Saleslogix Web Client.

To enable

1. Make a list of employees who should be able to grant contacts access to Saleslogix Customer Portal.
2. On the Administrator Navigation Bar, click **Users**.
3. In the **Users** grid, double-click the first user in your list to open the user's profile.
4. On the **Service/Support** tab, select **User may grant access to Customer Portal**.

   This enables the employee to use Saleslogix with Customer Service or Saleslogix Web Client with Customer Service to open a contact record, click the Web Access tab, and set up a user name and password for the contact so the user can log on using Saleslogix Customer Portal.
5. Click **OK**.
6. Repeat steps 3-5 for each employee on your list.
7. Inform the employees that when they log on to the Saleslogix Network Client or the Saleslogix Web Client with Customer Service, and open a contact record, the Web Access tab appears so that they can set up a user name and password for the contact.

   Once this is set up, the contact can log on to Saleslogix Customer Portal to view tickets, create new tickets, close and re-open tickets, and access SpeedSearch. For more information, see the Saleslogix Customer Portal Help.

Testing the Saleslogix Customer Portal Web Site

Use the same procedure to test the Web site as you did for the Web Client (as explained in “Testing the Web Site” on page 70); however, modify the URL as follows:

http://localhost/SlxCustomerPortal

The localhost is the name of your Web Host server.

Note If you deployed the Saleslogix Customer Portal to a Web site you created during the Web Host installation, or to another Web site you created manually in IIS, the format is: *http://servername:portnumber/SlxCustomerPortal.*

The server is the name of your Web Host server. The port is the port number you specified during the Web Host installation.

Linking from Your Company’s Web Site

After Saleslogix Customer Portal configuration is complete, you must create a link to it from your company’s Web site.

Create the link in the following format:

http://*servername*/*SlxCustomerPortal*

For example:

```
<a href=“http://servername/SlxCustomerPortal
“> Report a Problem/Check for a Response</a>
```

If you deployed the Saleslogix Customer Portal to a different Web site in IIS, create the link in the following format:

```
<A HREF=”http://servername:portnumber/SlxCustomerPortal”
“> Report a Problem/Check for a Response</a>
```

The server is the name of your Web Host machine. The port is the name of the port the Web site is using. The Web site name is *SlxCustomerPortal*, unless you specified a different name when deploying Saleslogix Customer Portal.

Configuring Client Computers

To ensure the Saleslogix Customer Portal functions correctly, configure settings in each user’s browser as described in the following table.

Note The option locations and wording may vary depending on your browser version. For more information on these options, refer to your browser’s Help.

Internet Explorer Option	Setting
Temporary Internet Files>Settings	Check for newer versions of stored pages **Automatically**.
Privacy tab	**Medium** or lower (cookies must be enabled).

After completing this chapter...

You have completed steps 2 to 8 in the checklist. If your implementation includes Remotes, proceed with Part III: “Remote Offices, Users, and the Offline Web”.

Part III
Remote Offices, Users, and the Offline Web

Chapter 11 | Configuring Synchronization

Before beginning this chapter...

Add licenses and configure the system as described in Chapter 4, “Configuring the Saleslogix System”.

Use the instructions in this chapter to...

Configure synchronization. These tasks are required for all Saleslogix installations that include remotes.

Synchronization Server refers to both the software that runs synchronization and the hardware on which the server is installed. A Sync Server is only necessary if you have Remote users (including Offline Web Client users) or Remote Offices, or you plan to run agents.

Use the *Saleslogix Planning Guide* to understand the synchronization process in detail and to make decisions regarding your synchronization requirements.

Creating Synchronization Transfer Profiles

Saleslogix supports three methods of synchronization. Each synchronization method is defined by one or more Sync Transfer Profiles. To create a Sync Transfer Profile, refer to one of the following:

- “Creating a Network Synchronization Profile” in the following section.
- “Creating an FTP Synchronization Profile” on page 85.
- “Creating an HTTP Synchronization Profile” on page 88.

Creating a Network Synchronization Profile

One way to synchronize with the main office is through a VPN (Virtual Private Network) connection. Using VPN, Remote users or offices connect to the Saleslogix network via the internet to send and receive transactions from the main office database.

This is the default method of synchronization. Unless you want to change the Sync Transfer Profile settings, Remotes can synchronize via network synchronization without additional configuration.

The next step...

Proceed to “Creating a Synchronization Service Profile” on page 92.

Creating an FTP Synchronization Profile

FTP support is built into both the Sync Server and Sync Client. When the Sync Server cycles, it connects to the FTP site and searches the FTP Infiles directory for any transaction exchange files that were sent by Remote users. Likewise, when the Sync Client cycles, it connects to the FTP site and searches the FTP Outfiles directory for transaction exchange files placed there by the main office. Essentially, all transaction exchange files, library files, and documents are delivered to and received from the FTP site.

Logging on to an FTP site can be accomplished in one of two ways:

- **Global login** - Using a global login, the Sync Server and all Remote users share the same login and password.
- **Personal logins** - Using personal logins, the Sync Server and each Remote user is assigned a different login to the FTP site.

Setting Up a Saleslogix FTP Site

An FTP site is a collection of files on an FTP server. The FTP server allows users to upload or download files through the Internet or other TCP/IP network using a File Transfer Protocol (FTP). By default, IIS uses Passive FTP connections.

When setting up an FTP site, 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.

- For FTP performance tips, see the “Improving FTP Synchronization Performance” topic in the Administrator Help.
- To configure FTP synchronization to use Active FTP connections, see the “Configuring FTP Sync to Run in Active or Passive Mode” topic in the Administrator Help.

If your implementation includes multiple Sync Servers, note the following:

- You can only have one /Infiles, /Outfiles, and /FailedTrans folder per Sync Server.
- You can have multiple FTP virtual folders per Sync Server. However, Saleslogix recommends approximately 50 Remote users per FTP virtual folder.
- Saleslogix recommends that your FTP Server is on the corresponding Sync Server (if possible).

Creating an FTP Sync Profile

The Sync Transfer Profile identifies the DLL file used for FTP synchronization.

To create

1. On the Administrator **Manage** menu, click **Sync Transfer Profiles**.
2. In the **Sync Transfer Profiles** dialog box, click **Add**.
3. In the **DLL** box, select **FTP Sync Transport v1.2 (SSftp.dll)**.
   If FTP Sync Transport is not available in the DLL list, verify the SSftp.dll file is located in the SalesLogix folder.
4. In the **Description** box, type a description of the synchronization method.
5. Click **Setup**.
6. In the **FTP Site** box, type the address of the primary FTP site to which the Sync Client connects (for example, ftp.yourcompany.com).
   You can use a named FTP site (for example, yourcompany.com), or an IP address (for example, ftp.123.45.67.8).
7. In the **Port** box, type the primary site’s port number on the FTP server.
   Port numbers allow IP packets to be sent to the FTP site.
8. In the **Alternate Site** box, type an alternate address that connects to your FTP site.
   If the Sync Client cannot connect using the primary address, it attempts to use the alternate address. For example, you can use the named FTP site as the primary site and the IP address as the alternate site.
9. In the **Port** box, type the alternate site’s port number on the FTP server.
10. In the **File Names** box, select **Uppercase**, **Lowercase**, or **Unspecified**.
    Response time improves considerably if this setting matches the way file names are stored on your FTP server. The default is Unspecified.

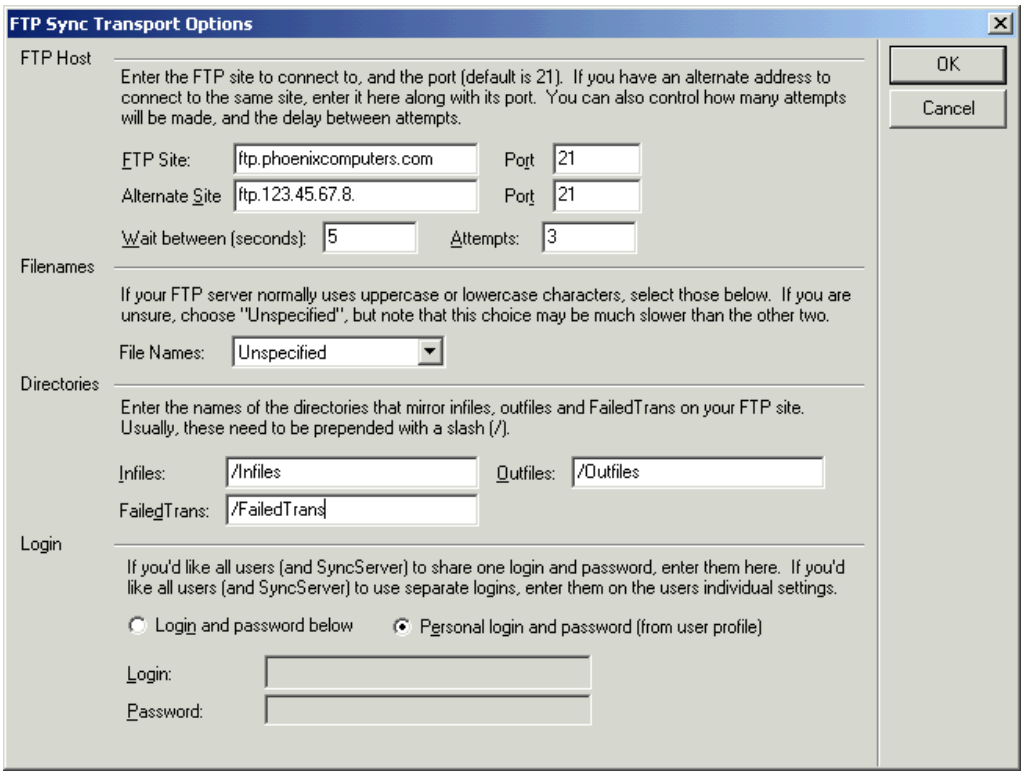
11. In the **Infiles**, **Outfiles**, and **FailedTrans** boxes, type the Infiles, Outfiles, and FailedTrans folder names on your FTP server (for example, /Infiles, /Outfiles, and /FailedTrans).

    Creating the folders is outlined in "Setting Up a Saleslogix FTP Site" on page 86.

12. Under **Login**:
    - Click **Login and password below** to assign the same login and password to the Sync Server and all Remote users. Then in the **Login** box, type the general login that is shared by all Remote users and Sync Server(s) when logging on to the FTP site. In the **Password** box, type the corresponding password. Then, click **OK**.

      If you choose to use a global login, you can use the default anonymous user that comes with FTP. This user is already configured with the necessary permissions. This user has a Login of anonymous, and the corresponding Password is your domain name.
    - Click **Personal login and password** to assign a different login and password to each Sync Server and Remote user. Then, click **OK**.

      Use the FTP Sync Transport Local Options dialog box to set the login for the sync server. Personal logins for Remote users are set in the individual's user profile. The instructions for configuring the user login are in Chapter 12, "Configuring the Saleslogix Remote Client".



13. If you selected the **Personal login and password** option, in the **Edit Sync Transfer Profile** dialog box, click **Server Settings**. In the **Login** and **Password** boxes, type the Sync Server's login and corresponding password to the FTP site.
14. Click **OK**.
15. Proceed to "Creating a Synchronization Service Profile" on page 92.

Creating an HTTP Synchronization Profile

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 transaction exchange files (TEFs) that were uploaded by Remote users. Likewise, when the Sync Client cycles, it connects to the HTTP Server and searches the Outfiles folder for any transaction exchange files placed there by the main office. All transaction exchange files, library files, and documents are uploaded to and downloaded from the HTTP Server.

Note If you are creating an HTTP site on Windows 2008, IIS 6 compatibility is required. Ensure you enable IIS 6 compatibility on the HTTP Server. See "Web Requirements" on page 15 for details.

Setting Up a Saleslogix HTTP Site

An HTTP site is a collection of files on an HTTP Server that allow users to upload or download files via the Internet. HTTP synchronization requires Internet Information Services (IIS) with World Wide Web Service installed.

When synchronizing using HTTP, you must set up IIS and configure the necessary folders for file transfer.

Note Before creating the HTTP Site, ensure you have IIS with HTTP Support installed and running.

See one of the following sections as appropriate for your server version.

- "To create an HTTP site on Windows 2003" in the following section.
- "To create an HTTP site on Windows 2008 or 2012" on page 89.

To create an HTTP site on Windows 2003

1. On the HTTP Server, create a folder where you want the Saleslogix Web site you create to point. For example, SLXHTTPSync.
2. In the folder you created in the Step 1, create the following three sub folders:
   - Infiles
   - Outfiles
   - FailedTrans
3. Open **Internet Information Services (IIS) Manager**.

   Ensure that WebDAV (Web-based Distributed Authoring and Versioning) is enabled.

   Note Although WebDav has been determined to impact SData, you can enable it here without issues. It is automatically disabled in the SLXClient, SData and ProcessHost portals at deployment. This will not affect HTTP sync.

4. In the **Internet Information Services** tree view, expand your HTTP Server, and then expand **Web Sites**.
5. Right-click the **Web Sites** folder, point to **New**, and then click **Web Site**.
6. On the Web Site Creation Wizard **Welcome** screen, click **Next**.
7. On the **Web Site Description** screen, type a name for the Web site. For example, SalesLogix HTTPSync.
8. Click **Next**.
9. On the **IP Address and Port Settings** screen, complete the following (the screen may vary depending on your implementation):
   a. In the **Enter the IP address to use for this Web site** box, leave the default setting of **All Unassigned**.
   b. In the **TCP Port this Web site should use** box, change the port number to port 1024 or higher. Record the port number you are using.
   c. In the **Host header for this Web site** box, leave the field blank.
   d. Click **Next**.

10. On the **Web Site Home Directory** screen:
    a. In the **Path** box, click **Browse** and navigate to the folder you created in Step 1. DO NOT point to the network logging path.
    b. Clear the **Allow anonymous access to this Web site** check box.
    c. Click **Next**.
11. On the **Web Site Access Permissions** screen:
    a. Enable only the following Permissions: **Read**, **Write**, and **Browse**.
    b. Click **Next**.
12. Click **Finish**.
13. In the **Internet Information Services** tree view, right-click your new Web site, and then click **Properties**.
14. In the ***Web Site*** **Properties** dialog box, click the **Directory Security** tab.
15. In the **Authentication and access control** section, click **Edit**.
16. In the **Authenticated access** section, select **Digest authentication for Windows domain servers**.
17. In the **IIS Manager** information dialog box, click **Yes** to continue.
18. In the **Authentication Methods** dialog box, click the Realm **Select** button, browse to and select the domain of your HTTP Server, and then click **OK**.
19. In the **Authentication Methods** dialog box, click **OK**.
20. In the ***Web Site*** **Properties** dialog box, click the **HTTP Headers** tab.
21. Click the **MIME Types** button.
22. In the **MIME Types** dialog box, click **New**.
23. In the **MIME Type** dialog box:
    a. In the **Extension** box, type **SLXT**.
    b. In the **MIME type** box, type **Text/Plain**.
    c. Click **OK**.
24. In the **MIME Types** dialog box, click **OK**.
25. In the ***Web Site*** **Properties** dialog box, click **OK**.
26. Reset IIS.

After setting up IIS, you must create a Sync Transfer Profile in the Administrator. Proceed to “Creating an HTTP Sync Transfer Profile” on page 91.

To create an HTTP site on Windows 2008 or 2012

1. On the HTTP Server, create a folder where you want the Saleslogix Web site you create to point. For example, SLXHTTPSync.
2. In the folder you created in the step 1, create the following three sub folders. Set folder permissions to Read, Write, and Modify.
    - Infiles
    - Outfiles
    - FailedTrans
3. Open **Internet Information Services (IIS) Manager**.
    a. Create or use an existing Saleslogix application pool.
    b. Ensure the identity of the application pool is set to log on with a user that has Read, Write, and Modify permissions to the HTTP sync folders you created in step 2.
    c. For 64-bit operating systems, enable 32-bit applications.
4. In the **Connections** tree view, expand your HTTP Server, and then expand **Sites**.

5. Right-click the **Sites** folder, and then click **Add Web Site**.
   The Add Web Site dialog box opens.
   a. In the **Site name** box, type a name for the Web site. For example, SalesLogix HTTPSync.
   b. In the **Physical path** box, browse to the folder you created in Step 1. DO NOT point to the network logging path.
   c. Click **Connect as**, verify **Application user (pass-through authentication)** is selected, and click **OK**.
   d. Click **Test Settings** to verify the connection.
   e. In the **Type** box, ensure http is selected.
   f. In the **IP address** box, select **All Unassigned**.
   g. In the **Port** box, change the port number to port 1024 or higher. Record the port number you are using. If necessary, port 80 can be used.
   h. Leave the **Host name** box blank.
   i. Click **OK**.
6. In the **Connections** tree view, select your Saleslogix HTTP Web site.
7. In the Features View under **IIS**, double-click **Authentication**.
8. In the **Authentication** list, select **Anonymous Authentication**, and in the **Actions** pane click **Disable**.
9. Enable Windows Authentication.
   a. In the **Authentication** list, select **Windows Authentication**, and in the **Actions** pane click **Enable**.
   b. In the **Actions** pane, click **Advanced Settings**.
      The Advanced Setting dialog box appears.
   c. In the **Extended Protection** drop-down, select **Off** or **Accept** (either option works), and then click **OK**.
   d. In the **Actions** pane, click the **Providers** link.
   e. In the **Enabled Providers** list, select **NTLM** and move it to the top of the list.
   f. Click **OK**.
10. In the Features View under **IIS**, double-click **MIME Types**.
    a. In the **Actions** pane, click **Add**.
    b. In the **File name extension** box, type **SLXT**.
    c. In the **MIME type** box, type **text/plain**.
    d. Click **OK**.
11. In the Features View under **IIS**, double-click **Directory Browsing**.
12. In the **Actions** pane, click **Enable**.
13. Enable and configure WebDAV (Web-based Distributed Authoring and Versioning).

    Note: Although WebDav has been determined to impact SData, you can enable it here without issues. It is automatically disabled in the SLXClient, SData and ProcessHost portals at deployment. This will not affect HTTP sync.

    a. In the Features View under **IIS**, double-click **WebDAV Authoring Rules**.
       If WebDAV Authoring Rules is unavailable, download the WebDAV Extensions for IIS from Microsoft.
    b. In the **Actions** pane, click **Enable WebDav**.
    c. In the **Actions** pane, click **Add Authoring Rule**.
    d. In the **Add Authoring Rule** dialog box, set the following options, and then click **OK**.
       - Under **Allow access to**, select **All Content**.
       - Under **Allow access to this content to**, select **All users**.
       - Under **Permissions**, select the **Read**, **Source**, and **Write** options.
14. Reset IIS.

After setting up IIS, you must create a Sync Transfer Profile in the Administrator. .

Note WebDav has a default upload limit of 30 MB which can cause HTTP sync to fail to sync portals to Offline users. You can edit the HTTPSync web.config file as follows to increase this:

```
<security>
 <requestFiltering>
  <requestLimits maxAllowedContentLength=”2000000000” />
 </requestFiltering>
</security>
```

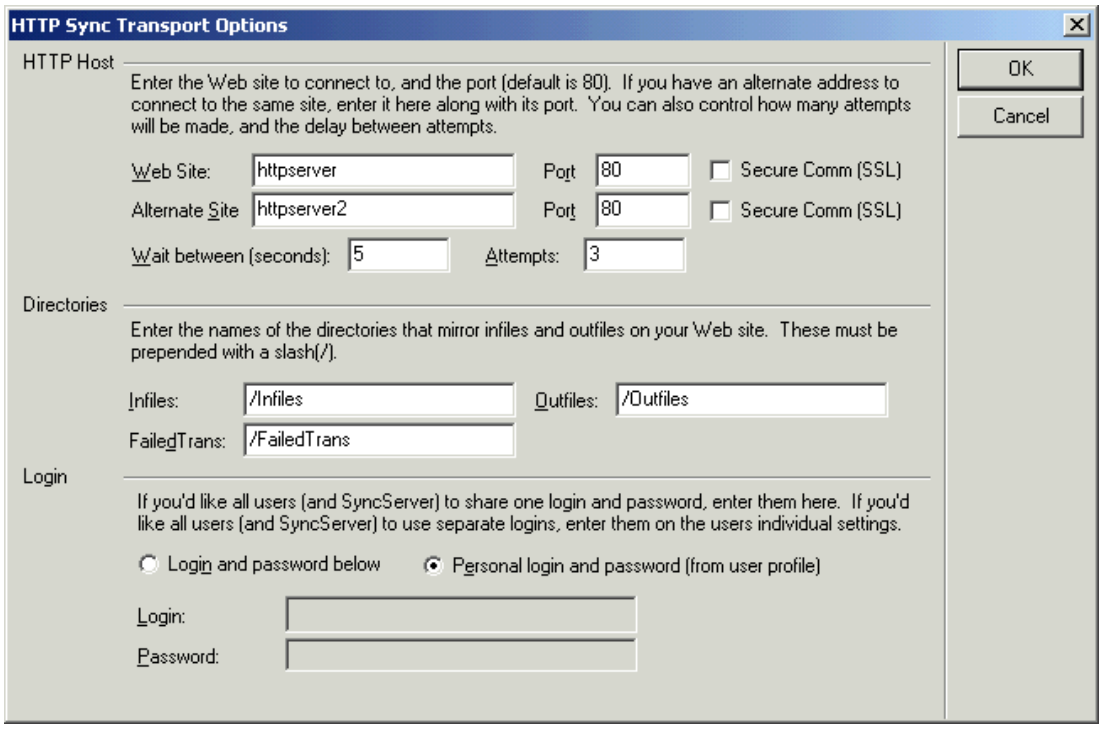
Creating an HTTP Sync Transfer Profile

The Sync Transfer Profile identifies the DLL file used for HTTP synchronization.

To create

1. On the Administrator **Manage** menu, click **Sync Transfer Profiles**.
2. In the **Sync Transfer Profiles** dialog box, click **Add**.
3. In the **DLL** box, select **HTTP Sync Transport v1.2 (SShttp.dll)**.
   If HTTP Sync Transport is not available in the DLL list, verify the SShttp.dll file is located in the SalesLogix folder.
4. In the **Description** box, type a description of the synchronization method.
5. Click **Setup**.
6. In the **Web Site** box, type the name of the HTTP Server to which the Sync Client connects for file transfer (for example, httpserver). This is the name of the server the Sync Client connects to, not the URL.
   Use the format: Servername or Servername.DomainName. Do not include http:// before the server name.
7. In the **Port** box, type the port number of your HTTP Server.
   This is the port number you defined in Step 9 of the previous section.
8. Select the **Secure Comm (SSL) check box** if you are using a secure connection to transfer files between the HTTP Host and Saleslogix.
9. In the **Alternate Site** box, type an alternate HTTP Server for file transfer.
   If the Sync Client cannot connect using the primary Web Site, it attempts to use the alternate site.
10. In the **Port** box, type the alternate site’s port number on the HTTP Server.
11. If necessary, select the **Secure Comm (SSL) check box** if you are using a secure connection for your alternate site.
12. In the **Infiles**, **Outfiles**, and **FailedTrans** boxes, type the Infiles, Outfiles, and FailedTrans folder names on your HTTP server (for example, /Infiles, /Outfiles, and /FailedTrans).
    Creating the folders is outlined in “Setting Up a Saleslogix HTTP Site” on page 88.
13. Under **Login**:
    - Click **Login and password below** to assign the same login and password to the Sync Server and all Remote users. Then in the **Login** box, type the general login that is shared by all Remote users and Sync Server(s) when logging on to the HTTP Server. In the **Password** box, type the corresponding password. Then, click **OK**.
    - Click **Personal login and password** to assign a different login and password to each Sync Server and Remote user. Then, click **OK**.

Use the HTTP Sync Transport Local Options dialog box to set the login for the Sync Server. Personal logins for Remote users are set in the individual's user profile. The instructions for configuring the user login are in Chapter 12, "Configuring the Saleslogix Remote Client".



14. If you selected the **Personal login and password** option, in the **Edit Sync Transfer Profile** dialog box, click **Server Settings**. In the **Login** and **Password** boxes, type the Sync Server's login and corresponding password to the HTTP Server.
15. Click **OK**.

Creating a Synchronization Service Profile

Since synchronization can require a lot of system resources, it is recommended that you run synchronization during off-peak times, such as before or after normal business hours. To implement a synchronization schedule, you can use the Synchronization Service. Running the Sync Server from a Windows service allows synchronization to process without an administrator logged on to the server. In addition, the Monitor Console allows you to remotely view the status of the Sync Server and its scheduled jobs.

To create a Synchronization Service Profile, see the "Configuring Synchronization Server Automated Services" topic in the Administrator Help.

Starting the Synchronization Server

After installation and configuration, run a synchronization cycle to create the synchronization folders. This manual cycle also creates a registry entry that is used by Agent Runner to build a connection string.

Note: You must log on to the Synchronization Service computer as a Domain user. You cannot log on using the Local System account to cycle the Sync Server the first time. The Local System account does not have the correct privileges for running Agents.

To start

1. Click **Start**, point to **Programs**, point to **Saleslogix**, and then click **Synchronization Server**.
2. In the **Please log on** dialog box:
   a. In the **Username** box, type **admin**.
   b. In the **Password** box, type the admin user's password.
   c. In the **Log on to** box, ensure the correct database connection name displays.
   This is the connection name established in the Connection Manager.
3. Click **OK**.
4. If necessary, click **Yes** to register this computer to the database.
5. If the **Verify Administrator Password** dialog box appears, retype the administrator password, and then click **OK**.
6. Click **Sync Now** to cycle the Sync Server.
7. On the **File** menu, click **Exit** when the process is complete.

The first time you cycle the Sync Server, a sub folder is created in Documents and Settings\All Users\Application Data\Saleslogix\Sync. The folder name is server_name-alias_name. In addition, the Sync Server creates the ConfTran.stm file used for conflict resolution.

Modifying Virus-Checking Software for the Synchronization Server

If you have virus-checking software scanning the synchronization folders at the same time that the Sync Server tries to use a file within the folders, you may receive an "Error deleting file or folder" error. This occurs when the virus checking software checks the file at the same moment that the Sync Server tries to use that file.

To avoid errors, set your virus-checking software to modify scans to skip the following folders during real-time scans and/or scans scheduled to run at the same time the Sync Server is scheduled to run. If anti-virus programs are scanning the following folders in real time during a synchronization cycle, it may cause problems with synchronization to Remotes.

- WriteCache
- Infiles
- Outfiles
- FailedTrans
- WGLogs
- SharedLogs
- Archives

After completing this chapter...

You have completed the "Synchronization Tasks" checklist. If your implementation includes:

- Remote users: proceed with Chapter 12, "Configuring the Saleslogix Remote Client".
- Remote Offices: proceed with Chapter 13, "Configuring a Remote Office"
- Offline Web Client: proceed with Chapter 14, "Configuring Offline Web Clients".

Chapter 12 | Configuring the Saleslogix Remote Client

Before beginning this chapter...

Configure the Sync Server as described in Chapter 11, “Configuring Synchronization”.

Use the instructions in this chapter to...

Install and configure Saleslogix Remote Clients. These tasks are required for installations that include Remote users.

Remote Clients keep a subset of the main office database on their local computer (a laptop, for example) and use synchronization to transfer changes between their system and the main office. To synchronize data, the main office and each Remote client must have a set of synchronization folders on their computers and have the ability to transfer files. Remote users can also connect directly to the main office database using a LAN or WAN connection.

Planning for Remote Users

The computer used for creating remote databases must have SQL 2005 Native client installed.

Before adding Remote users, consider creating subscription rules to limit the number of account records stored on the Remote user’s database. Subscription gives Remote users access only to accounts that they use on a regular basis. This maintains the Remote user’s database at a manageable level and improves overall system performance. The use of subscription and subscription rules for Remote users is strongly recommended.

For more information, refer to the “What is Subscription?” and “Subscription Recommendations” topics in the Administrator Help.

Configuring Remote User Profiles

The Administrator is used to manage user profiles. In addition to the settings for Network users, Remote user profiles must contain synchronization and subscription information.

If you have not created your Remote users, refer to “Creating Users” on page 54. Then, configure the synchronization options as described in the following section.

Setting Synchronization Options

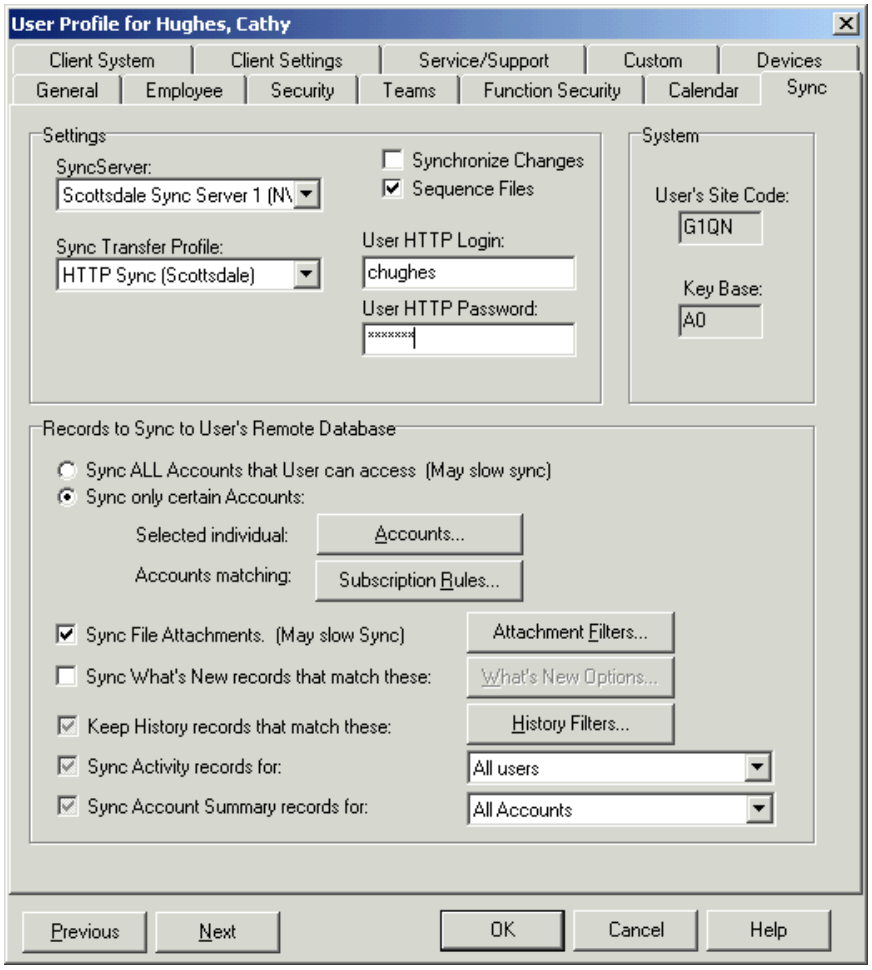
Synchronization options assign the Remote user to a Sync Server, and determine how the user synchronizes with the main office.

You must create system Sync Transfer Profiles before setting the Remote user’s Sync Transfer Options. If you have not created your system profiles, see “Creating Synchronization Transfer Profiles” on page 85 for instructions.

To set

1. On the Administrator Navigation Bar, click **Users**.
2. In the **Users** view, click the **Remote Users** tab, and then double-click a user name.

3. In the **User Profile** dialog box, click the **Sync** tab.



4. In the **SyncServer** box, select the Sync Server to which this user is assigned.

   If your implementation includes multiple Sync Servers, review the recommendations in the *Saleslogix Planning Guide* for assigning users to Sync Servers.

5. In the **Sync Transfer Profile** box, select the Remote user's method of synchronization.

   Your choices depend on the system sync transfer profiles configured in "Creating Synchronization Transfer Profiles" on page 85.

   If FTP or HTTP is your synchronization method, and you are using individual logins and passwords for each user and the Sync Server, type the user's login and password in the appropriate boxes.

6. To set subscription rules for the user, click **Subscription Rules**.
   a. In the **Subscription Rules** dialog box, select the rule(s) you want to apply to this user. Click **Copy**.
   b. Click **OK**.

7. To configure how attachments are sent to this Remote user, click **Attachment Filters**. In the **Attachment Filter Options** dialog box:
   a. To set a size limit, select **File Size Less Than**, and then type in a size limit.

      When this value is set, any attachments larger than the specified value will not automatically synchronize to the Remote. The Remote user can request the attachment, but it will not be sent when creating a Remote database or during the normal synchronization process.
   b. To set a date limit, select **Files Added Within Last**, and then type in a number of days.

      When this value is set, any attachments older than the specified value will not automatically synchronize to the Remote. The Remote user can request the attachment, but it will not be sent when creating a Remote database or during the normal synchronization process.

c. To apply these options to all Remote users, click **All Users**.
d. Click **OK**.

8. In the **User Profile** dialog box, click **OK**.

Creating a Remote User Database

Remote databases can be created using a Microsoft SQL Server Express instance.

Note When a remote database is created, it uses the host server collation settings. When the database is sent to the remote it will use the SQL Express installation collation settings.

When you install the Remote Client and use the SalesLogix media to install SQL Express the installation will automatically have the correct collation regardless of the Windows System Locale settings.

However, if you install SQL Express using a standalone install prior to installing SalesLogix then you must ensure that the collation is set correctly as per the Host Database, otherwise where the Windows System Locale is anything other than English (US), SQL Express will use the Windows System Locale settings to determine your collation and it will be incorrect.

For more information, see the Saleslogix Knowledgebase article called *Understanding Collation and Remote Databases*.

To create

1. On the Administrator **Tools** menu, click **Create Remote User Databases**.
2. In the **Create Databases** dialog box, under **Available Users**, select the user(s) for whom the database(s) will be created, and click the arrow to move them to the **Selected Users** box.

   Configuring the default database settings is explained in "Setting Database Options" on page 35. To change the settings for this user only, click Options or Properties and configure the changes.
3. Each database is placed in the folder specified in the **Create Remote DB in server directory box** on the Database tab of the Options dialog box. To create the database(s), do one of the following.
   - To create the database(s) immediately, click **Now**.
   - To create the database(s) at a later time, click **Later**.
     - In the calendar, select a date and time, and then click **OK**.
       The Administrator is unavailable when the timer is active.
     - The **Create Databases** dialog box displays a countdown to the scheduled date and time.

   A test is performed to ensure the settings are configured and that the database can be created in the chosen location.

   The database is created with the file name *SLX_userid_dat*.sxd.
4. Click **OK** to confirm successful completion.

If the Remote user's computer is connected to the network, create a folder on the Administrative Workstation and copy the database to the folder. Share this folder so that the Remote user's computer has access to it.

If the Remote user is not connected to the network, copy the database to the user's computer using some form of removable media. Another option is to zip the database, e-mail it to the Remote user, and instruct the user to copy it to his or her computer and unzip it.

Installing the Saleslogix Remote Client

Note If your company uses Outlook Integration, ensure you have completed the required steps under "Outlook Integration Requirements" on page 20 before you install the Saleslogix Remote Client.

Install the Saleslogix Remote Client on every Remote user's computer. The Saleslogix Remote Client cannot be installed on the same computer as the Administrative Workstation.

- If you created an automated installation using the instructions in “Creating Automated Client Installations” on page 59, see “Performing an Automated Installation” in the following section.
- If you did not create an automated installation, see “Performing a Manual Installation”.

Performing an Automated Installation

Installing the Saleslogix Client using an automated installation configures the Client computer with the settings selected when the installation was built.

When installing Saleslogix using an automated installation, third-party (prerequisite) applications are not installed. Third-party applications must be installed separately. Installations for these applications can be found in the Redist folder on the Saleslogix media.

To run

1. Distribute the entire folder structure created during the automated installation to the remote computer.
2. Instruct the Remote user to double-click **Saleslogix Remote Client.msi** in the root folder.
3. Install the Remote user database as detailed in “Installing the Remote User Database” on page 98.

Performing a Manual Installation

Run a manual installation if you do not want to install some components or if you want to change the installation location.

To run

1. On the **Saleslogix Installation** screen, click **Saleslogix Client Installations**.
2. On the **Saleslogix Client Installation** screen, click **Install Saleslogix Remote Client**.

If the installation does not detect the necessary prerequisites, you will be prompted to install them. Click Install to allow Saleslogix to install the required components or Cancel to stop the installation.

3. On the **Welcome** and **License Agreement** screens, read the information and accept the agreement, and then click **Next**.
4. On the **Setup Type** screen, select an installation type, and then click **Next**.
   - Click **Complete** to install the most common components.
   - Click **Custom** to install only certain components or to change the installation location. Use the **Custom Setup** screen to enable or disable items for installation.
5. On the remaining screens, click **Install** and **Finish** to complete the installation.

After installation, you must install the Remote user database as outlined in the following section.

Installing the Remote User Database

Before logging on to the Remote Client, you must attach the Remote database using the Remote Database Setup dialog box.

The connection contains the following values:

- The Database Name is set to SLXRemote.
- The Server Name is set to the name of the Remote user’s computer.
  To change this value, right-click **My Computer** on your desktop, and click **Properties**. The computer name appears on the **Computer Name** tab.
- The **User** name is set to sa.
- The sysdba password is set to Ma$t3rk3y.

When attaching the remote database, if the sysdba user does not exist, the user is created with a password set to Ma$t3rk3y. If the sysdba user already exists in the remote Microsoft SQL instance, then the sysdba user's password remains unchanged. However, the database installation sets the sysdba password in the Connection Manager to Ma$t3rk3y. Therefore, if the sysdba password on the remote database is set to a value other than Ma$t3rk3y, the Remote user must open the Connection Manager and change the sysdba password to the value in their database.

To install

1. Browse to the location of the Remote user database. The database file name is *SLX_userid_dat*.sxd.
2. Double-click the Remote database.
3. In the **Saleslogix Attach Remote** dialog box click **OK** to confirm a successful installation.

   If more than one Microsoft SQL Server instance is detected, you must select the instance you want to use in the Select the name of the SQL instance to use dialog box.

   The Attach Remote utility assumes the sa password is SLXMa$t3r. If you did not install Microsoft SQL Express using the Saleslogix installation, you may have to change the sa password in the Remote Database Setup dialog box before the database can be successfully attached.

Creating the Database Login

If you manually attach the SQL databases instead of using Attach Remote, you must enable the sysdba user or the Saleslogix database will not be listed in the Connection Manager. This task is only necessary if attaching the database manually.

To configure the sysdba user

1. In the **SQL Server Management Studio** dialog box, on the **Tools** menu, click **SQL Server Query Analyzer**.
2. If you are not connected to the server, the Connect to SQL Server dialog box opens. In the **Connect to SQL Server** dialog box:
   a. In the **SQL Server** box, select your server.
   b. Type the system administrator (sa) password.
   c. Click **OK**.
3. On the **File** menu, click **Open**, and browse to **sysdbafix_script.sql**.

   This script is located in the Database folder on the DVD.
4. In the **Query** dialog box:
   a. In the **DB** box, select your new database.
   b. Click **Execute Query** (the green arrow) to start the script.

      The number of orphaned users fixed with this statement should be 1.
5. Exit the **Query** dialog box and the **SQL Server Management Studio**.

After running the sysdbafix_script.sql, refresh the SQL Server Management Studio to display the sysdba user in the database.

Starting the Saleslogix Remote Client

After installation, the user who installed Saleslogix must log on to the Client computer(s) for the first time and launch various applications. This process creates the necessary registry entries for each application and creates a connection to the Remote database.

If the standard user does not have rights to install Saleslogix, an admin user must start the Client application. If the standard user has installation rights, he/she can simply log on and begin using Saleslogix. The Saleslogix Client must write to restricted areas of the registry. Therefore, once an admin user has logged on to the Client, a standard user can read from the registry's restricted area.

To start

1. On the **Start** menu, point to **Programs**, point to **Saleslogix**, and then click **Saleslogix Client**.
2. In the **Please log on** dialog box:
   a. Type your **Username** and **Password**.
   b. In the **Log on to** box, ensure the correct database connection name displays (for example, SLXRemote).
   c. Click **OK**.
3. Open the SLMailClient.exe.
   By default, the Mail Client is installed in ...\Program Files\Saleslogix\SLMail.
4. (Optional) Configure synchronization of the Remote user's database to run automatically when the user is logged on to the main office database.

   For more information on automated synchronization, see the "Saleslogix Synchronization Client" topic in the Saleslogix Client Help.

Configuring Outlook Sync

5. If your implementation includes Outlook Sync, notify each Saleslogix Client user that they will be prompted to configure Outlook Sync using the Saleslogix Connector the first time they open Microsoft Outlook. .

   For more information on configuring the Saleslogix Connector, see the Saleslogix Connector Help.

Creating a SpeedSearch Schedule

You can set a schedule on the Remote user's computer to determine when SpeedSearch indexes are run. If a schedule is not set and your Host updates indexes when the Remote computer is turned off, the indexes on the Remote are updated when the user starts their computer. This update may delay the user as he/she cannot immediately start their work.

To create

1. On the Saleslogix Client **Tools** menu, click **SpeedSearch Options**.
2. In the **Index** list, select the index(es) for which you want to set a schedule.
3. In the **Full Update** section, select the date and time you want the index(es) to complete a full update.
4. In the **Daily Update** section, select how you want to schedule daily incremental updates.
   - **When Saleslogix Opens** - All enabled indexes are updated when you open the Saleslogix Client.
   - **When Saleslogix Closes** - All enabled indexes are updated when you close the Saleslogix Client.
   - **Once at** - Select the time of day that you want to update all enabled indexes.
   - **Repeat Every** - Select or type how often you want all enabled indexes to be updated.
5. Click **OK** .

After completing this chapter...

You have completed the "Remote User Tasks" checklist. If your implementation includes:

- Remote Offices: proceed with Chapter 13, "Configuring a Remote Office"
- Offline Web Client: proceed with Chapter 14, "Configuring Offline Web Clients".

If your implementation does not include additional components, you can now begin using Saleslogix.

Chapter 13 | Configuring a Remote Office

Before beginning this chapter...

Configure the Sync Server as described in Chapter 11, “Configuring Synchronization”.

Use the instructions in this chapter to...

Install and configure a Remote Office. These tasks are required for installations that include a Remote Office(s).

A Remote Office consists of a group of users who access a Remote Office database. Unlike Remote users, these users do not individually synchronize with the main office. Instead, synchronization occurs when the Remote Office database synchronizes with the main office. A Remote Office may support any combination of Network and Web Client users.

The main office’s Administrator manages the Remote Office and Remote Office users.

Remember that SQL 2005 Native client is required on the computer that creates Remote databases.

Configuring the Remote Office Profile

Before configuring the Remote Office profile, you must have a Remote Office license(s) installed. One license is required for each Remote Office.

To configure

1. On the Administrator Navigation Bar, click **Systems**, click the **Offices** tab, and then double-click the **Remote Office** name.
2. On the **Sync Options** tab in the **Office Description** box, type the Remote Office name.
3. Under **Remote Office Options**:
   a. Use the **Synchronize Changes** check box to activate or deactivate synchronization for this remote office.
      Select this option only after you install and configure the Remote Office Sync Client, and the database is ready to accept synchronization files.
   b. Ensure the **Sequence Files Before Apply** check box is selected to check for missing, duplicate, or incorrect index numbers in Transaction Exchange Files (TEFs) before changes are made to the main office database.
      If this option is selected, the Archives folder stores a copy of all files sent to the main office. Once a confirmation is received from the main office that all files were successfully transferred, the archives are deleted.
   c. Click **Transfer Options**. In the **Transfer Options** dialog box:
      - In the **Sync Transfer Profile** box, select the Remote Office’s method of synchronization.
        Your choices depend on the system sync transfer profiles configured in “Creating Synchronization Transfer Profiles” on page 85.
      - Click **Custom Settings** to enter a login and password for the Remote Office.
      - Click **OK**.

4. Under **Shared Paths**:
   a. In the **Logging** box, type the location of the Remote Office logging folder using UNC conventions and the shared names.
      For example, \\MyServer\RemOffice Sync Logs, ***not*** \\MyServer\C:\RemOffice Sync Logs.

      Note It is not possible to use a logging path on a different (trusted) domain if the SLX Service is using the local system account. To use a logging path on a different domain, you must change the SLX Service from the local system account to a domain user with rights on both domains.

   b. In the **Library** box, type the location of the Remote Office Library folder using UNC conventions and the shared names.
      For example, \\MyServer\Library, ***not*** \C:\RemOffice Sync Logs\Library.
   c. In the **Attachments** box, type the location of the Remote Office Documents folder using UNC conventions and the shared names.
      For example, \\MyServer\Documents, ***not*** \\MyServer\C:\RemOffice Sync Logs\Documents.
      If you are connected to the network, browse to the Remote Office folders.
5. Click **OK**.

Adding Users to a Remote Office

After configuring the Remote Office profile, assign Network and/or Web Users to the Remote Office.

To add

1. If necessary, use Administrator to create users as described in "Creating Users" on page 54.
2. In the **User Profile** dialog box, click the **Sync** tab.
3. Under **General**, in the **Location** box, select the remote office to which you want to assign the Network user.
4. Click **OK**.
5. Repeat this procedure for all Remote Office Network users.

Creating a Remote Office Database

Create Remote Office databases using Administrator.

Note When a remote database is created, it uses the host server collation settings. When the database is sent to the remote it will use the SQL Express installation collation settings.

When you install the Remote Client and use the SalesLogix media to install SQL Express the installation will automatically have the correct collation regardless of the Windows System Locale settings.

However, if you install SQL Express using a standalone install prior to installing SalesLogix then you must ensure that the collation is set correctly as per the Host Database, otherwise where the Windows System Locale is anything other than English (US), SQL Express will use the Windows System Locale settings to determine your collation and it will be incorrect.

For more information, see the Saleslogix Knowledgebase article called *Understanding Collation and Remote Databases*.

To create

1. On the Administrator **Tools** menu, click **Create Remote Office Databases**.
2. In the **Create Databases** dialog box, under **Available Remote Offices**, select the office(s) for which the database(s) will be created, and click the arrow to move them to the **Selected Remote Offices** box.
   The default database settings were configured in "Setting Database Options" on page 35. To change the settings for this office only, click Options and make the changes.

3. Each database is placed in the folder specified in the **Create Remote DB in server directory box** on the Tools > Options > Database tab. To create the database(s), do one of the following.
   - To create the database(s) immediately, click **Now**.
   - To create the database(s) at a later time, click **Later**.
     - In the calendar, select a date and time, and then click **OK**.
       The Administrator is unavailable when the timer is active.
     - The **Create Databases** dialog box displays a countdown to the scheduled date and time.

   A test is performed to ensure that the settings are configured and that the database can be created in the chosen location.

   The database is created with the file name *SLX_sitecode_dat*.sxd.
4. Click **OK** to confirm successful completion.

Transfer the database to the remote office database computer. If the computer is connected to the network, create a folder on the Administrative Workstation and copy the database to the folder. Share this folder so the remote office's computer has access to it.

If the Remote Office computer is not connected to the network, copy the database to the office's computer using some form of removable media. Another option is to zip the database, e-mail it to the Remote Office, and then copy it to the Remote Office's computer and unzip it.

Installing the Web Host

If the Remote Office will be using the Saleslogix Web Client, you must install the Web Host. Follow the instructions detailed in "Configuring the Web Host" on page 41.

Installing a Remote Office

The Remote Office is the computer that processes synchronization files and ensures that the main office and Remote Office database contain the same information. Because the synchronization process is resource intensive, do not install the Remote Office on the same computer as the Remote Office database. Rather, install the Remote Office on a dedicated computer with direct access to your network.

To install

1. On the **Saleslogix Installation** screen, click **Standard Server Installation**.
2. On the **Standard Server Installation** screen, click **Remote Office Server**.

   Note: If the installation does not detect the necessary prerequisites, you will be prompted to install them. Click Install to allow Saleslogix to install the required components or Cancel to stop the installation.

3. On the **Welcome** and **License Agreement** screens, read the information and accept the agreement, and then click **Next**.
4. On the **Setup Type** screen, select an installation type, and then click **Next**.
   - Select **Complete** to install all components on this computer.
   - Select **Custom** to install only certain components or to change the installation location. Use the **Custom Setup** screen to enable or disable items for installation.
5. Depending on your installation type, you will be prompted to enter some or all of the following information on the installation screens:
   - **Use Local System Account** - Select this option if the local user account has the correct security permissions to install Saleslogix.

     If you do not select this option, set the information for the Saleslogix Service user you created as described in "Permissions Required for the SLXService User (without Administrator rights)" on page 12.
   - **Domain** - Type the network domain where you created the Saleslogix Service user.
   - **User Name** - Type the name of the Saleslogix Service user (for example, SLXService).
   - **Password** and **Confirm** - Type the Saleslogix Service user's password.

- Port **Change** button - Changes the port number used for communication between the Clients and Saleslogix Server. In most implementations, the default port number does not need to be changed. However, if you have another application or service using port 1706, you should change the port number to an unused port.
- **Configure IIS for the Web Server -** Select this check box if your installation includes the Saleslogix Client and\or SData portals. This makes necessary modifications to IIS.

6. On the remaining screens, click **Install** and **Finish** to complete the installation.

Installing the Remote Office Database

Note the following when using SpeedSearch at your remote office:

- If the SpeedSearch Service is started before you install the Remote Office database, no SpeedSearch indexes are created.
- If the SpeedSearch Service is started after the Remote Office database is installed, but before the first Sync Client cycle, the SpeedSearch indexes are created but there are no documents in either the Library or Documents folder. A search will not find anything until the first schedule for those indexes is run.
- If you rename the database in the Attach Remote utility, you must complete additional steps to ensure the SpeedSearch indexes are created. See the “SpeedSearch Indexes Not Built For New Database” troubleshooting topic in the Administrator Help for more information.

To install

1. Browse to the location of the Remote Office database. The database file name is *SLX_sitecode_dat*.sxd.
2. Double-click the remote database.
3. In the **Remote Database Setup** dialog box, click **OK**.
4. In the **Saleslogix Attach Remote** dialog box click **OK**.

   If more than one Microsoft SQL Server instance is detected, you must select the instance you want to use in the Select the name of the SQL Server instance to use dialog box.

After installing the Remote Office database, you are ready to start the Remote Office Synchronization Client.

Creating the Database Login

If you manually attach the SQL databases instead of using Attach Remote, you must enable the sysdba user or the Saleslogix database will not be listed in the Connection Manager. This task is only necessary if attaching the database manually.

To configure the sysdba user

1. In the **SQL Server Management Studio** dialog box, on the **Tools** menu, click **SQL Server Query Analyzer**.
2. If you are not connected to the server, the Connect to SQL Server dialog box opens. In the **Connect to SQL Server** dialog box:
   a. In the **SQL Server** box, select your server.
   b. Type the system administrator (sa) password.
   c. Click **OK**.
3. On the **File** menu, click **Open**, and browse to **sysdbafix_script.sql**.

   This script is located in the Database folder on the DVD.
4. In the **Query** dialog box:
   a. In the **DB** box, select your new database.
   b. Click **Execute Query** (the green arrow) to start the script.

      The number of orphaned users fixed with this statement should be 1.
5. Exit the **Query** dialog box and the **SQL Server Management Studio**.

After running the sysdbafix_script.sql, refresh the SQL Server Management Studio to display the sysdba user in the database.

Deploying Web Portals for the Remote Office

The Web Portals are:

- Saleslogix Client
- SData
- Saleslogix Job Service

If the Remote Office will include these features, you must use the Application Architect installed at the main office to deploy the relevant portal(s).

Note Ensure you run a synchronization cycle on the Host before deploying the Web site (see "Starting the Synchronization Server" on page 92). The sync cycle creates the PortalDeployments folder required for the Web site deployment.

To deploy

1. On the Application Architect **View** menu, click **Deployment Explorer**.
2. In the **Deployments** tree view, double-click **Remote Sales Client**.
3. In the **Name** box, type a name for the deployment.
4. In the **Description** box, type a description for this deployment.
5. In the **Deployment Targets** tree view, do one of the following:
6. Click **Remote Office(s)**.

   The Remote Office Target Settings appear.

   a. In the **Server** box, type the name of your Web Host server.

      If you did not install the Web Host, and you are deploying to a separate Web server, type the name of your Web server.

   b. Ensure the **Deploy Target** check box is selected.

      This indicates the target is active and should be deployed.

   c. In the **Port** box, type the port number for your Web Host server. It must match the port for the Web site.

   d. In the **App Pool** box, type the name of the application pool for your Web site.

      For example, if you used the *Saleslogix* Web site, the App Pool is *Saleslogix*.
7. In the **Company Name** list, select the Remote Office(s) to which you want to deploy the Web Client.
8. Select the tab for each portal you want to deploy (SlxClient, SData, and\or SlxJobService):

   a. In the **Virtual Directory** box, type the alias name for the virtual directory.

   b. In the **Sub Directory** box, type the folder name where all portal files will be copied under the target's base directory.

   c. Ensure the **Deploy Portal** check box is selected.

      This indicates the portal is active and should be deployed.

      Note When the Inherit from Target check box is selected, the deployment uses the port and application pool settings of the current target to deploy the portal (these settings are specified under IIS Target Settings). If necessary, clear this check box and set a different Port and App Pool for the portal.
9. Click **Save**.
10. Do one of the following:
    - Click **Deploy** to deploy portals individually.
    - Click **Deploy All** to deploy all portals in the Remote Office.

    The RemoteManifest.xml file is created which contains the settings used by the remote registration services to add an existing IIS Web site or register the site with a server instance. When the Synchronization Server at the main office cycles, the portals are deployed to the remote.

Deploying an SData Portal

If your Remote Office users (Network or Web) will use Outlook Sync, you must deploy an SData portal. If you have not already done so, follow the steps outlined in “Deploying Web Portals for the Remote Office” on page 105.

Starting the Remote Office Synchronization Client

The first time the Remote Office Synchronization Client runs, the synchronization folders are created under the root RemOffice Sync Logs folder. This process only occurs if you configured the shared paths to the Remote Office (“Configuring the Remote Office Profile” on page 101) and shared the RemOffice Sync Logs folder.

The synchronization cycle processes the portal(s) deployed from the main office and allows access to the Web site.

The following files are created under the main RemOffice Sync Logs folder.

- Archives
- Infiles
- WGLogs
- What’s New.tlg

To start

1. Click **Start**, point to **Programs**, point to **Saleslogix**, and then click **Synchronization Client**.
2. In the **Log on to** dialog box:
   a. In the **Database** box, select the Remote Office database to which you want to log on.
   b. Click **OK**.
   The Remote Office Sync Client assumes you are logging on as the system administrator.
3. In the **Synchronization Client** dialog box, click **Execute**.
   The Remote Office Server creates the synchronization folders under the main RemOffice Sync Logs folder.
4. Click **Close** when the “Sync Process Completed” message appears.

Remember to select the Synchronize Changes option on the Administrator > Systems > Offices > Remote Office > Sync Options tab to activate synchronization for this remote office.

You can choose to run the Remote Office Synchronization Client as a service. For more information, see the Saleslogix Client Help topic called “Running the Remote Office Synchronization Client as a Service”.

Installing Remote Office Network Clients

To install Saleslogix Network Clients in the Remote Office, refer to “Installing Network Clients” on page 59.

Configuring Remote Office Web Clients

After installing and configuring the Web Remote Office, you must provide access to the Remote Office for Web Client users. Use the following URL format:

http://servername:port/<virtual directory name>. For example, http://servername:8086/SlxClient.

Configuring Outlook Sync

If your implementation includes Outlook Sync:

- Notify each Saleslogix Client user that they will be prompted to configure Outlook Sync using the Saleslogix Connector the first time they open Microsoft Outlook.
- Notify Web Client users that installing Desktop Integration is an option available to all Saleslogix Web Client users from the log on screen. Some features are browser-dependent, so review the Compatibility Guide available on the Support portals for full information.

  After installing Desktop Integration, each user must configure Outlook Sync and will be prompted to do so using the Saleslogix Connector the first time he or she opens Microsoft Outlook. See the Saleslogix Connector help for more information.

When installing Desktop Integration with Office 2007, the user must be logged in with Administrative rights

For more information on configuring the Saleslogix Connector, see the Saleslogix Connector Help.

.

After completing this chapter...

You have completed the “Remote Office Tasks” checklist. If your implementation includes Offline Web Clients, proceed with Chapter 14, “Configuring Offline Web Clients”. If not, you can begin using Saleslogix.

Chapter 14 | Configuring Offline Web Clients

Before beginning this chapter...

Configure the Sync Server as described in Chapter 11, “Configuring Synchronization”.

Use the instructions in this chapter to...

Install and configure Offline Web Clients. These tasks are required for installations that include Offline Web Client users.

Offline Web Client users are remote users that connect to their local database using the Web Client. Synchronization is used to transfer changes between the Offline Web Client user’s database and the main office database.

- Offline Web Client users cannot request attachments.
- Offline Web Clients cannot set a SpeedSearch schedule.

.Configuring the Offline Web Client User

Offline Web Client users must be created as Remote users in the Administrator. Remote user profiles must contain synchronization and subscription information.

To create Remote users that will access Saleslogix using the Web Client, refer to the following sections:

- “Planning for Remote Users” on page 95 - to determine subscription rules.
- “Creating Users” on page 54 - to add Remote users. Offline Web Clients users are added in the Administrator as Remote users.
- “Setting Synchronization Options” on page 95 - to configure how the Offline Web Client user synchronizes with the main office.
- “Configuring Roles” on page 69 - to configure Web Client access for Offline Web Client users.
- “Creating a Remote User Database” on page 97 - to create the remote database.

After adding Remote users, setting synchronization options, and creating remote databases, install the Offline Web Client.

Deploying the Web Site to Offline Web Clients

Use the Application Architect to deploy the Saleslogix Web site to Remotes. You must add the SData portal to this deployment for the Desktop Integration Module to support the Offline Web Client.

Ensure you run a synchronization cycle on the Host before deploying the Web site (see “Starting the Synchronization Server” on page 92). The sync cycle creates the PortalDeployments folder required for the Web site deployment.

Offline Web Clients must be deployed using the Virtual File System (VFS). Deployments created from a local file system are not supported and will not function correctly.

To deploy

1. On the Application Architect **View** menu, click **Deployment Explorer**.
2. In the **Deployments** tree view, double-click **Remote Sales Client**.

3. (Optional) In the **Name** box, type a deployment name. For example, Offline Web Clients.
4. In the **Description** box, type a description for this deployment.
5. In the **Deployment Targets** tree view, click **Remote Users**.
   The Remote User Target Settings appear.
6. In the **Deployment Targets** tree view, right-click **Remote Users** and then click **Add Portal(s)**.
7. In the **Select Portal(s)** dialog box, select **SData**, and then click **OK**.
8. Select the remote users who will receive the Web Client deployment.
9. On the **SlxClient** tab:
   a. In the **Virtual Directory** box, type the alias name for the virtual directory.
      By default, the Virtual Directory is SlxClient.
   b. In the **Port** box, type the port number for the Web site.
      The Saleslogix Web Server requires its own port for each portal instance. The port for each portal must be unique.
   c. Ensure the **Deploy Portal** check box is selected.
      This indicates the portal is active and should be deployed.
10. Click **Save**.
11. Click **Deploy**.
    The RemoteManifest.xml file is created which contains the settings used by the remote registration services to add an existing IIS Web site or register the site with a personal server instance.

Running a Synchronization Cycle

After deploying the Web site, a synchronization cycle must run to deploy the portal to remotes. Synchronization is set to run automatically every 30 minutes. You can run a manual synchronization cycle immediately or wait for an automated cycle to complete.

Understanding the Offline Web Client Installation

Users do not need administrator rights to install or run the Offline Web Client. However, the Offline Web Client installation installs third-party prerequisites if they are not detected on the user's computer. Administrator rights are required to install the following:

- Windows Installer 4.5
- Windows Powershell 1.o for Windows 2003 (x86)
- Microsoft SQL Express 2008 R2

If Microsoft SQL Express 2008 R2 is not detected, Saleslogix will install it. If a previous version of Microsoft SQL Express with a Saleslogix instance is detected during the Saleslogix installation, the Saleslogix instance will be upgraded and 2008 R2 will be installed in addition to the earlier version.

- .Net Framework 4.5.1 installed in Integrated mode
- Microsoft SQL 2005 Backwards Compatibility
- .Net AJAX Extensions
- Internet access to Microsoft.com

You can grant the user installing the Offline Web Client administrator rights or install all the required prerequisites before running the Saleslogix installation.

Installing Without Administrator Rights

To install the Offline Web Client without administrator rights, ensure you have installed all the prerequisites listed in the previous section. If the Offline Web Client installation does not detect the necessary prerequisites and the user running the installation does not have administrator rights, the Offline Web Client installation will not complete.

Installing With Administrator Rights

To install the Offline Web Client and the required prerequisites, you must grant the user administrator rights for the computer on which you are installing Saleslogix. See your Microsoft documentation for instructions on granting administrator rights using one of the following options:

- Add each user to the local machine's Admin group for the duration of the implementation.
- Use a domain user account that is a member of the domain admin group for the duration of the implementation.

Installing the Offline Web Client

The Saleslogix Personal Web Server is installed with the Offline Web Client to host the Saleslogix portals on the Remote computer. Therefore, IIS is not required on the Remote Client computer.

To install

1. On the **Saleslogix Installation** screen, click **Saleslogix ClientInstallations**.
2. On the **Saleslogix Client Installation** screen, click **Install Saleslogix Offline Web Client**.
3. On the **Welcome** and **License Agreement** screens, read the information and accept the agreement, and then click **Next**.
4. On the remaining screens, click **Install** and **Finish** to complete the installation.

Installing the Remote User Database

Install the Offline Web Client database using the steps outlined in "Installing the Remote User Database" on page 98.

Running a Synchronization Cycle

Users must run a synchronization cycle before they can log on to the Web Client. The synchronization cycle processes the portal(s) deployed from the main office and allows access to the Web site.

To run

1. On the **Start** menu, point to **Programs**, point to **Saleslogix**, and then click **Synchronization Client**.
2. Log on using your Saleslogix user name and password.
3. Click **Sync Now**.

Logging on to the Web Client

After running a synchronization cycle to set up the portal, you can log on to the Web Client using the system tray icon.

To log on

1. Right-click the system tray icon, and then click **Open Site**.
2. Log on using the standard Web Client log on screen.

Installing Desktop Integration

Offline Web Client users must download and configure the Desktop Integration Module to use SendSLX, Record to History and so forth. See “Installing Desktop Integration” on page 72 for details.

Configuring Outlook Sync

If your implementation includes Outlook Sync, notify the Offline Web Client users to install Desktop Integration and configure Outlook Sync.

Installing Desktop Integration is an option available to all Saleslogix Web Client users from the log on screen. Some features are browser-dependent, so review the Compatibility Guide available on the Support portals for full information.

After installing Desktop Integration, each user must configure Outlook Sync and will be prompted to do so using the Saleslogix Connector the first time he or she opens Microsoft Outlook. See the Saleslogix Connector help for more information.

When installing Desktop Integration with Office 2007, the user must be logged in with Administrative rights

.

After completing this chapter...

You have completed the “Remote User Tasks” checklist. You can now begin using Saleslogix.

Part IV
Appendices

Appendix A | Creating a Database for Oracle

Before beginning this chapter...

Verify you have installed the prerequisites and created and shared the logging folders as described in Chapter 2, "Preparing Your Environment".

Saleslogix recommends having an experienced Oracle database administrator (DBA) to properly administer, tune, and maintain the Saleslogix database, especially in a UNIX environment. The *Saleslogix Planning Guide* provides a discussion of the Oracle database platform and implementation considerations.

Note The instructions in this chapter are provided as an example of creating an Oracle database for Saleslogix. This information can be safely used in a demonstration environment. For production systems, your Oracle DBA may use the information in the Saleslogix scripts as an example, but the database should be created by your DBA specifically for your environment.

To create a database for Oracle, you must do the following:

1. Create an Oracle database instance
2. Create a Net Service Name
3. Configure the Oracle database
4. Import the database structure
5. Index the database
6. Add database views

Creating an Oracle Database Instance

Refer to your Oracle documentation to create a database on UNIX. In a demonstration environment, you can accept the Oracle defaults for the Saleslogix database.

Ensure the Saleslogix database is placed in its own instance.

Creating a Net Service Name

After creating the database instance, you must create a Net Service Name (also called database alias).

Refer to the Oracle documentation for instructions to create a database alias.

Configuring the Oracle Database

After creating the database instance and Net Service Name, you must configure the database for Saleslogix. This process is automated using scripts provided by Saleslogix. Depending on your Oracle version, use SQL *Plus Worksheet or SQL Developer to perform the following tasks:

- Create permanent, temporary, and index tablespace and data files.
- Create an Oracle database login.

Note You must run the scripts used to complete these tasks in a specific order. If you do not run the scripts in the order outlined in the following sections, they do not work.

When running the scripts, you must log on with the Oracle sysdba option. Log on as “sys” with the Connect as option set to sysdba.

Note Due to legacy requirements of an earlier database platform, the name of the Saleslogix schema owner is sysdba.

Creating Tablespaces and Data Files

A tablespace logically organizes data in an Oracle database, while physically storing the data in one or more associated data files. To use Oracle with Saleslogix, you must create the permanent (SLX_DATA), temporary (SLX_TEMP), and index (SLX_INDEX) data files.

Note The CreateOracleSpace.sql script must be run as the sys user using the sysdba role.

To create

1. Open the **CreateOracleSpace.sql** script.
   The script is located in the Database\Oracle folder on the Saleslogix DVD.
2. Modify the Tempfile and Datafile paths as appropriate for your environment.
   If necessary, you can also modify the script to ensure that tablespace and data files are sized correctly.
3. Log on to SQL *Plus Worksheet or SQL Developer.
4. In the **Login Information** dialog box:
   a. In the **Username** box, type **sys**.
   b. In the **Password** box, type the corresponding system password.
   c. In the **Service** box, type the name of the database instance.
   d. Verify that **Connect As** is set to **sysdba**.
   e. Click **OK**.
5. On the **File** menu, click **Open**.
6. Browse to the **CreateOracleSpace.sql** script.
7. To load the script into the Query section, click **Open**.
8. To run the script, click **Execute**.
9. Run the script as described in the following section to create the database login.

Creating the Database Login

To connect to an Oracle database, a user must have a login name in the database and privileges to perform specific database operations. Since Saleslogix uses sysdba to log on to the Oracle database, you must create a new login for the sysdba user and grant the appropriate privileges.

Note The CreateOracleUser.sql script must be run as the sys user using the sysdba role.

To create

1. Open Oracle SQL *Plus Worksheet or SQL Developer.
2. On the **File** menu, click **Open**.
3. Browse to the **CreateOracleUser.sql** script.
   The script is located in the Database\Oracle folder on the Saleslogix DVD.
4. To load the script into the Query section, click **Open**.
5. To run the script, click **Execute**.

After creating the database login, you must import the database structure. Do not change the sysdba password before importing the database structure. If you change the password prior to importing the database structure, the import fails.

Importing the Database Structure

Saleslogix uses a DMP file to import the database structure into the Oracle database. The DMP file copies the default views, pick lists, reports, plugins, and other system information to the Oracle database. The DMP files are located in the Database\Oracle folder on the Saleslogix DVD.

The SLX_Blank.dmp file creates the blank Saleslogix database. To create an evaluation database, run the SLX_Eval.dmp file.

Before importing the database structure, do the following:

- If running Oracle on UNIX, FTP the DMP file(s) to the Oracle Server.
- If running Oracle on Windows, copy the DMP file(s) to the Oracle Server.

To import

1. On the Oracle Server, open a command window.
2. Type imp USERID='sys/sys_password@database_instance_name AS SYSDBA' fromuser=sysdba touser=sysdba grants=n statistics=none ignore=y file=absolute path to the location of the .dmp file\SLX_Blank.dmp.

   For example, if the database instance name is SLX, and it is located in the C:\Oracle\Databases folder, the command line would be

```
imp USERID=’sys/sys_password@SLX AS SYSDBA’ fromuser=sysdba touser=sysdba grants=n
statistics=none ignore=y:

     FILE=C:\Oracle\Databases\SLX_Blank.dmp
```

Indexing the Database

After importing the database using the DMP file, you must create Oracle-centric indexes in the appropriate tablespace. The CreateOracleIndexes file used to create the indexes can be modified as your database changes to drop or rebuild indexes as necessary.

Note The CreateOracleIndexes.sql script can be run as the sys user or the Saleslogix user “sysdba”.

To index

1. Open Oracle SQL *Plus Worksheet or SQL Developer.
2. On the **File** menu, click **Open**.
3. Browse to the **CreateOracleIndexes.sql** script.

   The script is located in the Database\Oracle folder on the Saleslogix DVD.
4. To load the script into the Query section, click **Open**.
5. To run the script, click **Execute**

Adding Database Views

After indexing the database, you must add database views for Saleslogix. The CreateOracleViews script creates new views to improve performance. Running this script allows you to create the necessary Saleslogix views without extra permissions for the sysdba user.

Note The CreateOracleViews.sql script must be run as the sys user using the sysdba role.

To add

1. Open Oracle SQL *Plus Worksheet or SQL Developer.
2. On the **File** menu, click **Open**.
3. Browse to the **CreateOracleViews.sql** script.
   The script is located in the Database\Oracle folder on the Saleslogix DVD.
4. To load the script into the Query section, click **Open**.
5. To run the script, click **Execute.**

The next step...

If you are completing task 5 of the "Required Tasks" checklist, refer to Chapter 3, "Installing Saleslogix" to install Saleslogix.

Appendix B | Configuring Accounting Integration

Before beginning this chapter...

Install and configure Web components as described in Chapter 5, “Installing the Web Components” and Chapter 8, “Configuring the Web Client”.

Accounting Integration allows you to share information between Saleslogix and any accounting system that supports the Sage CRM ERP Contract. Saleslogix Web Client users can view open sales orders, customer invoices, customer payments, open invoices, and their corresponding details. This feature is not available to Saleslogix Windows or Mobile Client users.

Saleslogix supports the synchronization of information between Saleslogix and supported accounting applications. However, depending on your accounting system, some of this information may not be available. Each accounting system determines the record types they will synchronize with Saleslogix. Depending on your integration, you may be able to synchronize all or some of the following:

- Accounts/Trading Accounts
- Addresses
- Contacts
- Contracts/Invoices
- Opportunities/Sales Quotes
- Prospects/Customers
- Sales Orders

Synchronization of information in real-time requires an internet connection. When using Accounting Integration on the Offline Web Client, data in real-time data views will be current as of the last time the Client connected with the host database.

Accounting Integration Features

When you integrate Saleslogix with an accounting system, you can transfer information between systems so that your front-office and back-office systems work together and contain the same data. Users can:

- View current pricing and discounts in Saleslogix with information pulled from the accounting system.
- Use price lists and products that originate in the accounting system.
- Submit sales orders from Saleslogix to the accounting system and receive confirmation when the order has posted.
- View warehouse information and product availability from Saleslogix.
- View order information such as price, discounts, shipping dates, and more in real-time.

Configuring Accounting Integration

To configure Accounting Integration you must enable endpoints, start the service, import records, and configure users and roles.

Configuring Accounting Integration modifies the connection to the Saleslogix product table so it is no longer possible to add products to an open opportunity. If you are using these instructions to add Accounting Integration to an existing Saleslogix 8.0 installation, make any necessary modifications to open opportunities first.

Running the SLX Integration Utility to Updated Phone and E-mail

Before setting up your Accounting Integration endpoints, you must run the SLXConversion utility to update Account Phone Number and E-mail records. This utility supports integration by adding columns to the Saleslogix database to enable a 1:many relationship for phone numbers and email addresses in Accounts and Contacts.

This creates a record in the ERPPHONENUMBER or ERPEMAILADDRESS table for each phone number and email column in either of the ACCOUNT or CONTACT tables. Those records are mapped back to the original entity column where they originated.

To run

1. On your Administrative Workstation, browse to the **SLXConversionUtility.exe** and **SLXConversionUtility.exe.config** files.
   By default the configuration files are in ...\Program Files\Saleslogix.
2. Double-click **SLXConversionUtility.exe.config** to open the file in a text editor of your choice.
3. Scroll to the <**connectionStrings**> section and change the **Initial Catalog** value from **SALESLOGIX_EVAL** to your database alias.
   For example:<connectionStrings> <clear/> <add name="Default" connectionString="Provider=SLXOLEDB.1;Persist Security Info=True;Initial Catalog=MyDatabaseAlias;Data Source=localhost;Extended Properties="PORT=1706;LOG=ON;CASEINSENSITIVEFIND=ON;AUTOINCBATCHSIZE=1;SVRCERT=12345;ACTIVITYSECURITY=OFF;TIMEZONE=NONE""/> </connectionStrings>
4. Double-click **SLXConversionUtility.exe** to open the utility.
5. Select all check boxes.
6. Click **Update.**
7. Click **Close**.

Configuring Endpoints

Accounting Integration is enabled when the Saleslogix endpoint and at least one target endpoint is configured and enabled. At least one endpoint must be active to share data between Saleslogix and your accounting system.

To set

1. On the Saleslogix Web Client **Administration** menu, click **Integration Setup**.
2. In the **Saleslogix Feed** box, type the SData URL that Saleslogix uses to share information between systems. Do one of the following:
   - If your implementation does not use the default port (port 80), use format http://server:port/sdatavirtualdir/*application*/*contract*/*operatingcompany*/-/
   - If your implementation uses port 80, omit the port number from the URL. The Sync Service automatically strips the default port from the URL which causes matching issues and errors. Avoid this by using format http://server/sdatavirutaldir/application/contract/operatingcompany/-/
   - Set *application* to slx.
   - Set *contract* to gcrm.

- Set *operatingcompany* to - (Saleslogix does not have an operating company).

3. In the **User Name** box, type the user name for the Saleslogix database that the accounting system connects to.
4. In the **Password** box, type the password for the user name.
5. In the **Display Name** box, type the display name for the feed.
6. Click **Save**.
7. If necessary, select the **Restrict account promotion to single accounting system** option to limit your integration to Saleslogix and one accounting system.
8. Click the **Accounting Systems** tab to configure the feed details for your accounting system(s).
9. Click **Add**.
10. Set the following values in the **Setup Accounting Integration** dialog box.

Box	Description/Action
Accounting Feed	Type the SData URL to the accounting system. 1. Do one of the following: • For implementations that do not use the default port (port 80), use format http://server:port/sdatavirtualdir/*application*/*contract*/*operatingcompany/-/* • For implementations that use port 80, omit the port number from the URL. The Sync Service automatically strips the default port from the URL which will cause matching issues and errors. Avoid this by using format http://server/sdatavirutaldir/appliation/contract/operatingcompany/-/ 2. Set *application* to your accounting application name. For example, Sage1000. 3. Set *contract* to gcrm. 4. Set *operatingcompany* to the operating company in your accounting application that you are integrating with.
User Name	Type the user name used to log on to the account system.
Password	Type the password for the corresponding user name.
Test Feed	Click to test and display the connection status.
Display Name	Type a display name for the accounting system. This name displays in the Web Client when users are linking records between Saleslogix and the accounting system.
Enables Synchronization, Linking and Transacting	Select to enable this feed.
Filter By Resource	Select a resource type and click the Execute button to display schema differences in the grid. This feature compares the schema for the selected resource in the two integrated systems and returns any differences in string lengths. If string values do not match, use the Database Manager or other application to modify the schema in one of the systems.

11. Click **OK**.

Comparing and Configuring Schema Differences

Saleslogix recommends comparing the database schema in Saleslogix with your accounting application schema to ensure data integrity. You can compare data for various resources to determine if differences in string lengths exist between systems.

This feature compares the schema for the selected resource in the two integrated systems and returns any differences in string lengths.

To compare

1. On the Web Client **Administration** menu, click **Integration Setup**.
2. On the **Accounting Systems** tab, click **Edit** for the enabled accounting system.
3. In the **Setup Accounting Integration** dialog box, use the Schema Differences section to find differences between systems.
   a. In the **Filter By Resource** box, select the resource type.
   b. Click **Execute**.
   c. Review the differences in the grid.
   d. Note any information that may cause data integrity issues. For example, an accounting system field may only accept three characters when the same field in Saleslogix accepts free text.
4. Repeat step 3 for all resource types.
5. Use the Database Manager or other application to modify the schema in one of the systems.

Configuring Matching Criteria

Use the Matching tab to set global default matching criteria for users creating links. These settings will apply to all users as they link accounts between Saleslogix and your accounting system.

Saleslogix has defined default matching criteria for accounts. To modify the criteria specific for your company, see the “Matching Tab” topic in the Web Client help.

Configuring the Accounting Integration Synchronization Service

The Accounting Integration Synchronization Service (Saleslogix SData Sync Service) allows data transfer between Saleslogix and your accounting system. The service must be started and set to run as automatic.

To configure

1. Make sure you configure and enable endpoints as detailed in “Configuring Endpoints” on page 120 before starting the service.
2. Review the **SLXSDataSyncServer.exe.config** file to ensure the connection is defined correctly at the end of the file. The connection information should match the **connection.config** deployed to your Web site.
   By default the configuration file is in ...\Program Files\Saleslogix\SLXSDataSyncServer.exe.config and the connection file is deployed to ...\inetpub\wwwroot\slxclient
3. On the Administrative Workstation, open **Services**.
4. Right-click the **Saleslogix SData Sync Service**, and then click **Properties**.
   a. In the **Startup type** box, select **Automatic**.
   b. Set the service to log on and run as the WebDLL user.
      Ensure you have enabled Windows Authentication for the WebDLL user. See “Configuring the WebDLL User for Windows Authentication” on page 65 for details.
   c. Click **Start**.
5. Click **OK**.

Exporting and Merging Records from your Accounting System

After configuring the integration endpoints and starting the synchronization service, you can export records from your accounting system to Saleslogix. Any records imported into Saleslogix will be linked to the corresponding record in your accounting system. After exporting records, you should check for duplicate records.

The Check for Duplicates wizard compares records in Saleslogix to determine if your data contains duplicates. The wizard creates a job containing possible duplicate data. You can use the job results to merge or remove duplicates.

To export and merge

1. Use the export tool provided by your accounting system to export the appropriate data into Saleslogix.
2. On the Web Client **Tools** menu, click **Check for Duplicates**.
3. On the **Select a Source** screen:
   a. In the **Select type of Job drop**-down list, select the entity type for which you want to check for duplicates.
   b. In the **Group** drop-down list, select the group of records within the selected entity type.
   c. Click **Next**.
4. On the **Search Options** screen, select the filters you want the wizard to use when matching data.
   If you select a value, the data in both records must be an exact match to be considered a duplicate.
5. (Optional) Click **Advanced Match** to set additional match options.
6. Click **Next**.
7. On the **Review** screen, verify your selections for this job.
8. Click **Submit**.
9. Click the **Job Number** link to open the Check for Duplicates History Detail view and view any potential duplicates.
10. On the **Potential Duplicates** tab, click the **Resolve** link.
11. In the **Duplicate Search Results** section:
    - Click the **Merge** link for the account with which you want to merge this record. Then, use the **Merge Data** dialog box to select the data you want to keep.
    - Click **Not a Duplicate** if the record is not a duplicate and should be left as a separate record.
12. Return to the **Check for Duplicates History Detail** view and merge or mark records as not a duplicate for all records in the job.

Configuring User Roles

By default, users created in the Web Client are granted the Standard User role which allows access to accounts, contacts, opportunities, and other Saleslogix records. When enabling Accounting Integration, you should assess the roles required for each user depending on the tasks they will perform.

Review the “What are Roles and Secured Actions?” topic in the Web Client help to determine what access is required for each of your Saleslogix Accounting Integration users and use the Roles view to assign and remove your user’s roles as appropriate.

After completing this chapter...
You have completed task 17 in the “Web Tasks” checklist.

Appendix C | Advanced Web Host Configuration

To maximize performance, you may need to scale your Web implementation. The Web components can be scaled at any time after your initial implementation. This appendix explains how to scale the implementation and includes instructions for completing a manual configuration.

Scaling the Web Implementation

If many users access the client(s) simultaneously, you may need to add virtual servers or secondary Web Hosts to improve performance. A virtual server uses all of the same components as the Web Host, but exists on a different port (for example, a different Web site) on the same machine. Secondary Web Hosts are separate, physical Web servers.

In addition to the number of concurrent users, other factors, including database size, Server hardware, and Web Host hardware, influence performance. The need for additional virtual servers or Web Hosts must be individually evaluated for each implementation.

To add a virtual server

1. Manually configure the Web site using an available port. See one of the following as appropriate.
   - “Configuring Web Hosts/Virtual Servers: Windows 2003 Server” on page 126
   - “Configuring Web Hosts/Virtual Servers: Windows 2008 Server” on page 127

To install a secondary Web Host

1. Follow the instructions in “The WebDLL User” on page 13.
2. Install the Web Host as detailed in “Configuring the Web Host” on page 41.
3. Ensure that the secondary Web Host has network access to the primary Web Host so that the necessary HTML and JavaScript files are available.
4. In each user’s browser, make the Web site a Trusted site with the Default Level of security (Low).

Monitoring Active Thread Count

The recommended default thread setting is 32, and in most cases, it should not be necessary to modify this setting.

Saleslogix does not recommend lowering the default thread setting unless server responses are slow because of processing demands, and does not recommend raising the default thread setting, except in rare cases.

For example, it may be helpful to raise the default thread setting if you are experiencing random 500 errors from IIS. It may also be helpful to raise the default thread setting in situations where many long-running, low-intensity actions are being performed by a user.

For best performance, create another Web site (virtual server) on the same machine or on a different machine rather than raising the default thread setting.

To monitor active thread count (ISAPI connections) on your Web Host after you complete the implementation, use the Saleslogix counters in Microsoft System Monitor.

For more information, refer to “Monitoring Web Host Performance” on page 129.

Configuring Web Hosts/Virtual Servers: Windows 2003 Server

If you use Windows 2003 Server, and you would prefer to manually create a Web site and virtual directories, follow the instructions in this section.

Creating the Web Site(s)

To enable users to access the Web Client, create a Web site in IIS for each Web Host and virtual server.

To create

1. Use the IIS wizard to create each Web site with the following settings:
   a. **TCP port** - Any available port greater than 1024.
      Port numbers 1024 and less are reserved by Microsoft.
   b. **Path to your home directory** - C:\inetpub\wwwroot.
      This is the default setting. You have the option to change the default path.
   c. **Access Permissions**:
      - Select **Read access**.
      - Clear **Run scripts**.

   All other default settings in the wizard are acceptable.
2. Right-click the name of each site, and then click **Properties**. Set the following options:

Tab	Step(s)	Notes
Web Site	Select the **Enable HTTP Keep-Alives** check box.	May improve performance slightly.
Home Directory	Clear the **Index this resource** check box.	May improve performance slightly.
Directory Security	Next to **Authentication and access control**, click **Edit**. Select the **Enable anonymous access** check box, and set anonymous access to the WebDLL user.	The anonymous user is the user name IIS uses to verify that the Web server has the appropriate security to access all necessary directories. Ensure you select the WebDLL user from your company's domain and enter the correct password for the user.

Enabling the Active Server Pages Web Service Extension

To ensure the Saleslogix Web components run correctly, you **must** enable the Active Server Pages Web service extension. By default, this extension is disabled when it is installed.

To enable

1. In **IIS,** click the **Web Service Extensions** folder.
2. In the details view, select **Active Server Pages**, and then click **Allow**.

Configuring ASP.NET

Microsoft .NET Framework with ASP.NET enabled is required on the Web server. If a previous version of Microsoft .NET Framework with ASP.NET has been installed, ensure that ASP.NET is selected in IIS after you install the Web components. Select ASP.NET in the ASP.NET tab.

If you install Microsoft .NET Framework before you install IIS, ASP.NET is not installed.

See “The WebDLL User” on page 13for the steps to configure ASP.NET.

Configuring Application Pool Permissions

You must configure the Application Pool for your Saleslogix Web site to ensure you have sufficient permissions to start the Saleslogix OLE DB Provider. The Web site is named Saleslogix, unless you changed it during Web Host installation.

See “Configuring Application Pool Permissions” on page 49 for detailed configuration steps.

Using Application Pools (Optional)

An application pool is a configuration that links one or more applications to a set of one or more work processes. Because each application in an application pool is separate from other applications by work process boundaries, an application in one application pool is not affected by problems caused by applications in other application pools. This means that each pool can be restarted without affecting other applications.

By default, an application pool named Saleslogix is created when you install the Saleslogix Web Host. Moving Saleslogix to an application pool is optional; it is not required to run Saleslogix Web components.

Configuring Web Hosts/Virtual Servers: Windows 2008 Server

If you use Windows 2008 Server, and you would prefer to manually create a Web site and virtual directories, follow the instructions in this section.

Creating the Web Site(s)

To enable users to access the Web Client, create a Web site in IIS for each Web Host and virtual server.

To create

1. Use the IIS wizard to create each Web site with the following settings:
   a. **TCP port** - Any available port greater than 1024.
      Port numbers 1024 and less are reserved by Microsoft.
   b. **Path to your home directory** - For example, C:\inetpub\wwwroot.
   c. **Pass-through Authentication**:
      - Click **Connect As**, and then click **Specific User**. Enter the credentials for your WebDLL user. For example, domain\WebDLL.

   All other default settings in the wizard are acceptable.
2. Right-click the name of each site, and then click **Properties**. Set the following options:

Tab	Step(s)	Notes
Web Site	In the **Features View** pane > **HTTP Response Header** > under **Set Common Headers**. Select the **Enable HTTP Keep-Alives** check box.	May improve performance slightly.
Directory Security	In the **Features** view, under **Authentication**, click **Edit**. Select the **Enable anonymous access** check box, and set anonymous access to the WebDLL user.	The anonymous user is the user name IIS uses to verify that the Web server has the appropriate security to access all necessary directories. Ensure you select the WebDLL user from your company’s domain and enter the correct password for the user.

Configuring Application Pool Permissions

You must configure the Application Pool for your Saleslogix Web site to ensure you have sufficient permissions to start the Saleslogix OLE DB Provider. The Web site is named Saleslogix, unless you changed it during Web Host installation.

See "Configuring Application Pool Permissions" on page 49 for detailed configuration steps.

Using Application Pools (Optional)

An application pool is a configuration that links one or more applications to a set of one or more work processes. Because each application in an application pool is separate from other applications by work process boundaries, an application in one application pool is not affected by problems caused by applications in other application pools. This means that each pool can be restarted without affecting other applications.

By default, an application pool named Saleslogix is created when you install the Saleslogix Web Host. Moving Saleslogix to an application pool is optional; it is not required to run Saleslogix Web components.

Using Firewalls

If your company uses firewalls, you must open certain ports to enable the Web components to function correctly. You can set up your Web Host(s) Server in a Demilitarized Zone (DMZ) as long as the ports for the Web sites are open to the outside. Internally, the Web Host(s) must be able to access the appropriate ports on the Database Server, Saleslogix Server, and the server where the Documents and Library folders reside (typically the Synchronization Server). .

Assuming your Saleslogix Web servers sit between two firewalls (one connecting to the outside and the other to your LAN), use the following table as a guideline.

Server	Port	Open on
Database Server	1433 (MS SQL)	Inside firewall
Web Host	1706 (OLEDB)	Inside firewall
	1025 and/or other higher (HTTP port configured for each Web site)	Outside firewall
	11211 (required for the Saleslogix Cache Server)	Inside firewall
Synchronization Server* (Shared Documents & Library folders)	NetBIOS 138 (UDP) 139 (TCP)	Inside firewall Inside firewall
	If using Domain Name Service (DNS), also open these: 135 (TCP/UDP - Remote Procedure Calls) 137 (TCP - DNS) 445 (TCP/UDP - DS)	Inside firewall Inside firewall Inside firewall

*The Documents and Library folders may be located on another machine, such as the Administrative Workstation (for example, if your organization does not use synchronization). Be sure to open the ports on the correct machine.

RPC Communication

When deploying the VFS from a Saleslogix server (running Application Architect) to a separate Web Host, the Windows Firewall must be configured to ensure the proper Remote Procedure Call (RPC) communication.

To configure

1. Open **Windows Firewall** and click **Advance Settings**.
2. Create a new inbound rule and select “Remote Administration”
3. Click **Next**
4. Select the check boxes for all the of the available rules.
5. Click **Next.**
6. Select **Allow the Connection** and then click **Finish**.

Monitoring Web Host Performance

You can install the Saleslogix counters for Microsoft System Monitor to measure the performance of your Web Host(s). The monitor can help you identify peak times, shortcomings, and bottle necks.

To monitor

1. Open the Performance Monitor:
   - (Windows 2003 Server) From the **Start** menu, point to **Programs**, point to **Administrative Tools**, and click **Performance**. Then, select **System Monitor**.
   - (Windows 2008 Server) From the **Start** menu, point to **Programs**, point to **Administrative Tools**, and click **Reliability and Performance**. Then, select **Performance Monitor**.

   The Performance snap-in appears in the Microsoft Management Console.
2. Click the **Add** button.

   The Add Counters dialog box appears.
3. Select the **Use local computer counters** option.
4. In the **Performance object** box, select **Web Service**.
5. Select the **All counters** option.

   -or-

   Select the **Select counters from list** option. Then, press CTRL and click each counter you want to use.

   For more information on the function of each counter, select the counter and click **Explain**. A counter definition appears.
6. Select the **Select instances from list** option, and then click **Saleslogix**.
7. Click **Add**, and then click **Close**.

   The Performance Monitor Chart appears, and you can view the activity of your server.

   For more information on using Performance Monitor, refer to the Performance Monitor Help or the Microsoft MDSN Web site.

Appendix D | Manually Configuring IIS for Web Host

The Web Host installation automatically sets up IIS configuration. If you prefer to manually set up your web site instead of using the Web Host install, you must address the following system prerequisites before continuing with your Saleslogix installation.

Note You do not need to apply these manual settings if you created your web site using the Saleslogix Web Host install.

- ASP.NET 4.0, 32-bit version. For Web installations running on 64-bit versions of Windows 2003, you must enable the 32-bit mode.
  - **IIS 6** - To enable the 32-bit version of ASP.NET 4.0, open a command prompt (Start > Run > cmd) and type the following commands:
    - cscript %SYSTEMDRIVE%\inetpub\adminscripts\adsutil.vbs SET W3SVC/AppPools/Enable32bitAppOnWin64 TRUE
    - %SYSTEMROOT%\Windows\Microsoft.NET\Framework\v4.0.30319\aspnet_regiis -i
    - cscript %SYSTEMROOT%\Windows\System32\iisext.vbs /EnFile C:\WINDOWS\Microsoft.NET\Framework\v4.0.30319\aspnet_isapi.dll
    - %SYSTEMROOT%\Windows\Microsoft.NET\Framework\v4.0.30319\aspnet_regiis -s W3SVC/2/root/slxclient
    - %SYSTEMROOT%\Windows\Microsoft.NET\Framework\v4.0.30319\aspnet_regiis -s W3SVC/2/root/sdata
    - %SYSTEMROOT%\Windows\Microsoft.NET\Framework\v4.0.30319\aspnet_regiis -s W3SVC/2/root/processhost

    After running the commands, make sure the status of ASP.NET version 4.0.30319(32-bit) is set to “Allowed” in the Web service extension list in IIS Manager.

    Note If the ASP.NET version 4.0.30319(32-bit) is not visible, restart your computer to refresh the service extension list.

  - **IIS 7** - Use IIS Manager to enable 32-bit applications in the Saleslogix Application pool.
    - In IIS Manager, open the Saleslogix Application Pool Basic Settings. In the .NET Framework version box, select .NET Framework version 4.0.30319.
    - In the Managed pipeline mode box, select Integrated.
    - Open the Application Pool Advanced Settings. Set “Enable 32-Bit Applications” to True.

Appendix E | Automating Client Installations

Automating Client installations allows you to deploy customized installations of the Saleslogix Client to Network and Remote users. Using automated installations, the system administrator can create a configuration file containing all the desired Saleslogix settings and send it to users. Once received, the user can bypass the steps in the Installation Wizard and use the custom configuration file to install Saleslogix.

There are several advantages to using automated installations. You can:

- Enforce the use of specific settings for all users.
- Specify different configurations for different users.
- Install Saleslogix with minimal user input.

When installing Saleslogix using an automated installation, third-party (prerequisite) applications are not installed. Third-party applications must be installed separately. Installations for these applications can be found in the Redist folder on the Saleslogix media.

Customizing the Saleslogix Configuration File

You can modify the standard configuration file created using the Build Network Client Install or Build Remote Client Install on the Saleslogix DVD or create your own configuration file. Creating the standard configuration file is detailed on page 59.

The configuration file has an .ini file format and contains the following sections:

Features Contains name/value pairs in the format “<FeatureName>=<Value>”. Valid values are “YES” and “NO”. If a feature is not listed, the default value is YES.

Properties Contains name/value pairs for any Windows Installer property that you want to set. Standard Windows Installer properties and values can be found in the Microsoft Platform SDK documentation.

To customize

1. Open the standard configuration file or create a new configuration file. The standard configuration file name is the same as the corresponding .msi file. For example, SalesLogix Network Client.cfg.
2. Customize the configuration file features and properties as appropriate using the information in the “Understanding Features and Properties” section.
3. To deploy the configuration file to users, copy the entire directory structure of the Saleslogix Client installation to a shared network folder.

   Ensure the .cfg file is in the same folder as the .msi file.
4. Instruct users to run the Saleslogix Network Client.msi file on their computer.

   The .msi file reads the configuration file and installs Saleslogix according to your custom settings.

Understanding Features and Properties

Use the following settings to customize the Saleslogix Network Client or Saleslogix Remote Client configuration file.

Features

Use the Features section to determine the components you want to install on the Client computer. The following are the Saleslogix Client install features:

Feature Name	Descriptive Name
MailMerge	MailMerge
ImportWizard	Import Wizard
MailClient	Mail Client
NetForm	.Net Extensions
ClientHelp	Client Help
ImportWizHelp	Import Wizard Help
SpeedSearchHelp	SpeedSearch Client Help
Documentation	Documentation

Properties

The following properties can be set in the configuration file:

Property	Description	Values
BROWSER	Determines whether the install was launched from the browser.	• "Yes" if the installation was launched from the browser (or you want it to think that it was). • "No" if the installation was launched by some other means. This is the default.
Database Connection Properties		
The installation can set a default database connection if the appropriate properties are set.		
SLXDBSERVERPORT	The port number that the Saleslogix Server is listening on.	"1706". This is the default value.
SLXDBSERVER	The name or TCP/IP Address of the Saleslogix Server.	
SLXDBSERVERALIAS	The Alias that will be used for this connection.	
Install Helper Files Path Properties		
RTFFILEPATH	The String value containing the fully qualified path of the License File.	
MSDEPATH	The String value containing the fully qualified path of the Microsoft SQL Express installation path.	
READMEFILE	The String value containing the fully qualified path of the readme file.	
Microsoft SQL Express Related Properties		

Property	Description	Values
The following properties can be set in the configuration file and are passed to the Microsoft SQL Express installation:		
INSTANCENAME	A string containing the desired name of the Microsoft SQL Express instance that is being installed.	
SAPWD	A string containing the password for this Microsoft SQL Express instance. The default value is “SLXMa$t3r”.	

Example Configuration File

The following is an example of the Features section in the SalesLogix Network Client.cfg file:

```
[Features]
NetForm=NO
```

The following is an example of the Properties section in the SalesLogix Network Client.cfg file:

```
[Properties]
BROWSER=Yes
SLXDBSERVERPORT=1706
SLXDBSERVER=SalesLogix
SLXDBSERVERALIAS=SalesLogix_Eval
RTFFILEPATH=\\<SomeServer>\<SharedFolder>\
MSDEPATH=\\<SomeServer>\<SharedFolder>\SQLExpress\Setup.exe
INSTANCENAME=SalesLogix
SECURITYMODE=SQL
DISABLENETWORKPROTOCOLS=0
READMEFILE=\\<SomeServer>\<SharedFolder>\
```

Customizing the Administrative Tools and Servers Configuration File

The following Feature names can be used to customize the Administrative Tools and Servers installation. This may be necessary if you have multiple Administrative users and you want to deploy only specific applications to designated Administrative users.

Feature Name	Descriptive Name
SaleslogixServer	Saleslogix Server
SyncServer	Synchronization Server
SpeedsearchServer	SpeedSearch Server
Administrator	Saleslogix Administrator
ApplicationArchitect	Application Architect
Architect	Architect

Feature Name	Descriptive Name
Utilities	Administrative Utilities
NetForm	.Net Extensions
MailMerge	MailMerge
SyncEngineService	Saleslogix SData Sync Server

Appendix F | Silent Installs

Silent installs allow you to install Saleslogix components without any visible interface interaction, using command line prompts.

Commands and Options

The following table shows the basic MSIEXEC commands and options to use to install the Saleslogix components from the command prompt.

Note For a complete list of MSI options, run the following at the command prompt:
> msiexec /?

Feature Name	Command Line Script
OLEDB Provider	> msiexec /i "Saleslogix OLE DB Provider.msi" ALLUSERSPROFILE="%ALLUSERSPROFILE%" /qb+
Administrative Tools and Servers	> msiexec /i "Saleslogix Admin Tools and Servers.msi" ALLUSERSPROFILE="%ALLUSERSPROFILE%" SLXDBSERVER=<YOUR_SERVER_NAME> /L*v <PATH><LOG FILE> /qb+
Web Host	> msiexec /i "Saleslogix Web Host.msi" ALLUSERSPROFILE="%ALLUSERSPROFILE%" SLXDBSERVER=<YOUR_SERVER_NAME> /L*v <PATH><LOG FILE> /qb+
Remote Office Server	> msiexec /i "Saleslogix Remote Office.msi" ALLUSERSPROFILE="%ALLUSERSPROFILE%" /L*v <PATH><LOG FILE> /qb+
Network Client	> msiexec /i "Saleslogix Network Client.msi" ALLUSERSPROFILE="%ALLUSERSPROFILE%" /L*v <PATH><LOG FILE> /qb+
Network Remote Client	> msiexec /i "Saleslogix Remote Client.msi" ALLUSERSPROFILE="%ALLUSERSPROFILE%" /L*v <PATH><LOG FILE> /qb+
Offline Client	> SlxOfflineClientSetup.exe /s /v"/qn /L*v <PATH><LOG FILE>"
Custom - Outlook Integration	SlxDesktopIntegrationSetup.exe /s /v"/qn INSTALLDIR=\"C:\SLXDESKTOP\" ADDLOCAL=OutlookIntegration

Setting Properties on the Command Line

Power users can set certain properties on the command line.

For the installs that setup a database connection

CONFIGSLXDB="YES" ("YES" is the default. Flag to determine whether or not we update the Saleslogix database.)

SLXDBUSER

SLXDBPSWD

SLXDBSERVER

SLXDBSERVERALIAS

SLXDBSERVERPORT

For the installs that can create a web site (for Web Host installs)

CREATEWEBSITE= "Yes" ("Yes" is the default. Flag to create a website.)

WEBSITENAME

WEBSITEDOMAIN

WEBSITEPORT

WEBSITEUSERNAME

WEBSITEUSERPSWD

For installs that pre-configure the Desktop Manager (Desktop Integration)

Using the INI file allows you to preconfigure the Desktop Manager settings for the user. This includes settings for the SData portal.

```
SlxDesktopIntegrationSetup.exe /s /v"/qn INIFILEPATH=<path_to_ini_file>
INSTALLDIR=\"C:\Program Files\<installationfolder>\""
```

Sample DesktopIntegrationModule.INI file:

[Settings]

SDataServer=http://MyTLDATASdataServer:80

PromptDuplicates=1

PromptContacts=0

PromptUnresolved=1

ShowHistoryDetails=0

ShowTrayNotifications=1

UseWindowsAuthentication=0

Glossary

Account 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.

Administrative User A user who can perform tasks in the Administrator normally reserved for the system administrator.

Administrative Workstation The primary computer for administering and customizing Saleslogix. Usually, this is either the system administrator's personal computer or a separate computer dedicated to Saleslogix. The Administrator, Architect, Application Architect and Saleslogix Client are usually installed on this computer.

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

Application Architect A development environment containing the tools that allow developers to rapidly build, customize, manage, and deploy coded and codeless Web application solutions with one-click functionality.

Architect A development environment for creating customized views, menus, toolbars, and scripts for Saleslogix.

Bundle A bundle is a group of plugins or other customizable components that are packaged together for installation as a unit, rather than having to move them one by one, or re-create them on every database. Bundles containing Network plugins (.sxb files) are installed using the Administrator. Bundles containing Web customizations (.zip files) are installed using the Application Architect.

Concurrent Users The number of users accessing the database at any one time. In Saleslogix, a license type that enables multiple Saleslogix users to share the same license. For example, if you have 40 users and 30 Concurrent User licenses, all 40 users can log on to Saleslogix but only 30 can be logged on at the same time.

Contacts The prospects or customers in a company (account) that users interact with. Each account can contain one or more contacts.

Contract An agreement between your company and the customer to provide support services, either for free or for a specified fee.

Customer Service Customer Service allows designated users to track, qualify, and resolve customer questions and issues.

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

Defect A record describing a problem in a product or process, or a feature request for a product or process.

Entity A business object, such as account or product that contains business rule methods and events, relationships, properties, and forms. Entities can also have other related entities associated with them, either through child relationships or extensions.

Form A Smart Part containing normal content, markup, and controls. A Web form is similar to Forms created in the Architect.

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

Infiles A folder in which the main office, or Remote users or Remote Offices, 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.

Logging Folders Logging folders are

Lookup Lookups enable users to search for information under any of the major families (for example; account, contact, ticket, and so on) that shares certain characteristics. Once a lookup is created, you can save the result as a group. Lookups can be managed from the Architect or Administrator.

Offline Web Client Remote users that keep a subset of the main database on their computers (such as a laptop) and use synchronization to transfer changes between their system and the main office. Offline Web Client users make changes to their local database using the Web Client.

Outfiles A folder in which the main office places sync files during synchronization. Remotes obtain files from this location.

Opportunities Potential sales to accounts or contacts.

Outlook Sync an optional Saleslogix component that allows users to share activities and contacts between Saleslogix and Microsoft Outlook.

Package A group of related entities, forms, Smart Parts, templates, and aliases that are grouped together under a common name. Packages make it easier to manage your Web customizations.

Page A unit within a Web Portal. A page is a collection of workspaces.

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

Portal Represents a collection of Web pages.

PortalDeployments A folder in which the main office places deployed Web portals to be delivered to Remote users and Remote Offices.

Process Orchestration Allows you to create and configure process definitions and manage them with the Process Orchestration Host. Processes can be created for any entity, and any entity can be associated to multiple processes.

Processes A plugin that represents a series of tasks executed in a specific sequence over a set time period. Processes are used to perform repetitive tasks, implement a sales process, or provide an automated way of following up with customers. The Web components may only schedule processes and change process status.

Project A group of Web packages or plugins that are grouped together for easy retrieval and use.

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.

Remote Office A group of users that access a single Remote Office database directly. Unlike Remote users, Remote Office users do not synchronize with the database at the main office. Instead, the remote office regularly synchronizes with the database at the main office.

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, tickets, defects, activities, and related information.

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

SaleslogixPersonal Web Server Hosts the Saleslogix portals on the Remote computer. The Saleslogix Personal Web Server functions as a personal Web server for Offline Web Clients.

Saleslogix Remote Client Saleslogix Client users that keep a subset of the main database on their computers (such as a laptop) and use synchronization to transfer changes between their system and the main office. They can also connect directly to the main office database using a LAN/WAN connection.

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 Cache Server Stores Web data which allows the cache to be real-time.

SData Using SData features, you can expose an entity or a business rule to RESTful-based Web services, allowing you to integrate and enhance Saleslogix data with data from outside the application.

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 information, tables and fields, and functionality.

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

SLXService user A Windows logon name with security permissions that allow the Saleslogix Server and Synchronization Service to access all necessary directories.

SpeedSearch Enables users to find information stored in the Saleslogix database or external files.

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 remotes (users or Offices) and Network users. Synchronization can occur through a direct connection (LAN/WAN), FTP, or HTTP.

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

Synchronization Service A Windows service that communicates with the Synchronization Server(s) and SyncServices.cfg file for scheduling.

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

Ticket A record of a call relating to a question or problem experienced by the customer.

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

WebDll User A valid network logon name created when you implementation uses Web components. Has security permissions that allow the Web Host and the Saleslogix Job Service to access all necessary directories.

Web Remote Office A group of Remote users that access a single Remote Office database using the Web Client.

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

Index

P

R

S

T

U

V

W