Product Bulletin

Sage CRM SalesLogix v7

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Purpose

The purpose of this document is to give SalesLogix customers, Business Partners, and Technology Partners a look at the new product.

Product Overview

Sage CRM SalesLogix v7 provides exciting new capabilities across the product suite including interactive dashboards, integrated service and support, and full-featured mobile support, as well as numerous productivity enhancements for users, administrators, and developers, and .NET support. This release also marks the delivery of a completely integrated Sage CRM SalesLogix suite (sales, marketing, customer service, & support).

- ✓ Interactive Dashboards
- ✓ Full-Featured Mobile CRM
- ✓ Enhanced Marketing
- ✓ Integrated Service & Support
- ✓ Productivity Enhancements
- ✓ .NET Customization

Discontinued Features

- ✓ SalesLogix Support Client is not longer available and will not operate with SalesLogix v7. Features of the Support Client are now available in the SalesLogix Windows Client.

- ✓ Support Procedures have been discontinued and are no longer available

- ✓ Notification Manager has been discontinued and is no longer available. Ticket and Defect notifications are available at the Account level. Additional alerts and notifications are available with Sage Knowledgesync.

- ✓ Crystal Enterprise 8 is no longer utilized for Web Reporting - a Crystal Reports XI "Embedded Server" will be utilized. The server will support several reporting users at a time and a higher-performing upgrade will be available to support more concurrent users. There will be no concurrent user licensing required.

Dashboards

Dashboards feature gives a user-configurable and Architect-customizable view of key metrics.

✓ SalesLogix Dashboards has many features that make it an exceptional analysis tool. It has been designed so that anyone in an organization can use it without any significant training. It does allow users to change the data displayed on the dashboard, following the same functionality that all SalesLogix main views have with the ability to drag tabs to the middle section.

✓ Users can summarize data using different dimensions so that they can get a different perspective and identify root causes more easily. They also have the ability to perform period-to-period comparisons for months, quarters and years. This can be done using either fiscal calendar periods or Gregorian calendar periods.

✓ Users can drill to analysis views (i.e. interactive reports) from the dashboard. The analysis views offer the same functionality that the content sets do on the dashboard, plus the ability to filter the data using many different filters. Multiple values can be selected for each filter. For the Opportunity and Account filters, SalesLogix groups can be used to filter the data.

✓ SalesLogix Dashboards were created using the SalesLogix Architect. The solution can be customized so that customers can see the exact data that they are looking for.

✓ There is a good amount of pre-built content that is available in the Sales Dashboard. More content, including content for a Marketing and a Support dashboard will be made available in the future. For this release there are seven pre-built content sets and seven analysis views in one dashboard:

  o Sales

  o Key Performance Indicators (KPI)

  o Pipeline Status

  o Win Rate

  o Open Opportunities

  o Product Sales

  o Product Sales Potential

✓ ***Please note:*** *Dashboards are based on transactional data and performance depends on number of users, amount of data being reported, and database server performance. Dashboards are not intended for hundreds of users simultaneously accessing large data sets. Performance guidelines will be published separately, below are preliminary results:*

  o *Database Server: Quad Dual Core 2.6 GHz with 16GB Ram*

  o *Client Machine: Intel P4 3.2 GHz with 384MB RAM*

  o *500,000 Opportunities*

  o *2 Million Contacts*

  o *6,000 Activities*

  o *1.5 Million Activity History Records*

- o *Timings:*
  - *Query entire dashboard = 9/6 sec*
  - *Change List-by param on 1 content set = 4 Sec*
  - *Drill to Analysis View = 4 sec*
  - *Requery AV after filters = 11/6 sec*
  - *KPI portlet = 9/1 sec*

Add filters to see exactly the information you want
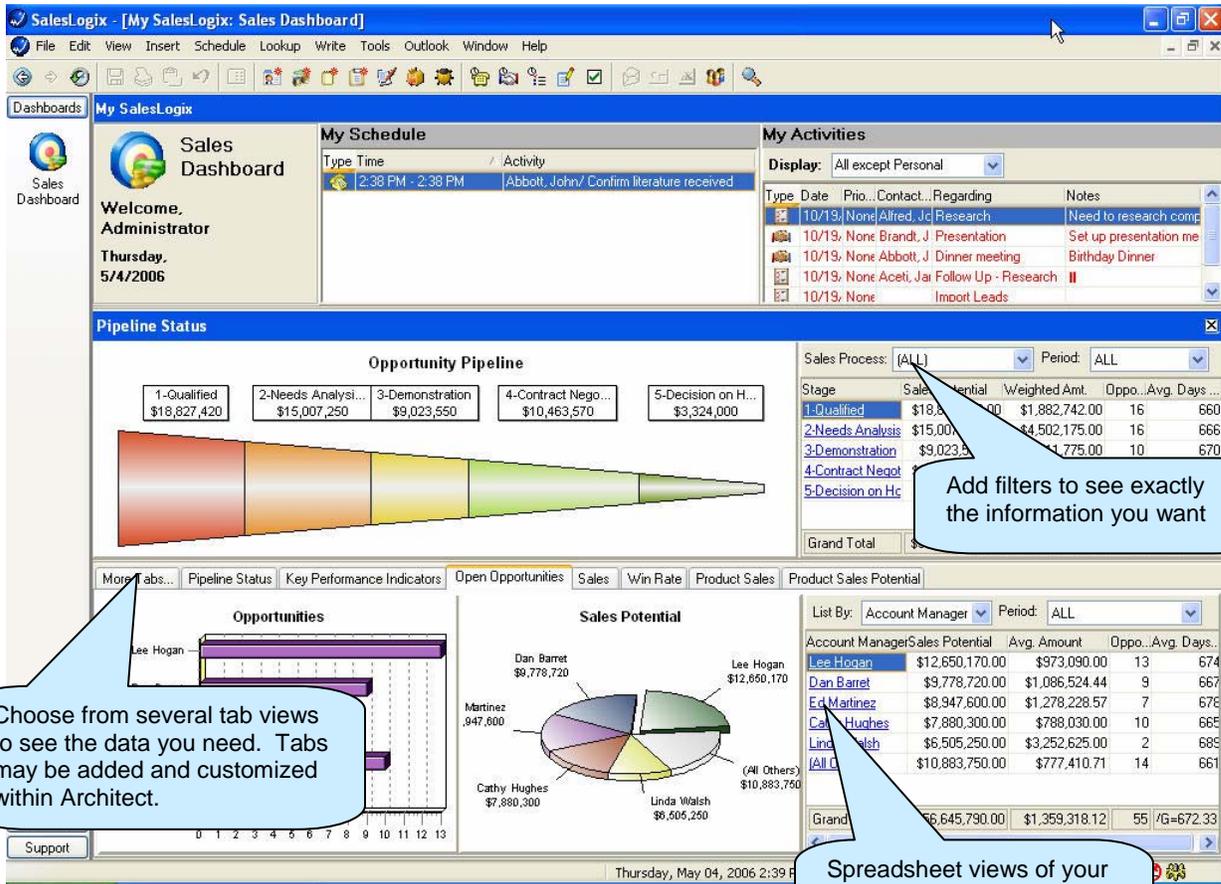
Choose from several tab views to see the data you need. Tabs may be added and customized within Architect.

Spreadsheet views of your data which may be drilled to see more detail in "Analysis view"

Export to Excel for deeper analysis of underlying data

Filter data at more granular level

SalesLogix Mobile

SalesLogix Mobile allows you to easily view or add accounts and contacts, schedule and complete activities, take notes, and track opportunities and review support tickets on a mobile device.

Managing your contacts, daily activities and opportunities has never been quicker or easier. No more having to wait for long PC bootup times or even lugging around your laptop. Just tap and go!

Need to get the latest pricing information from your home office? Simply connect wirelessly, via dial-up, or by cradle and you're up to date in seconds.

SalesLogix Mobile provides the same ease-of-use features that SalesLogix users are accustomed to, including:

✓ An easily navigated application that provides instant access to SalesLogix database information.

✓ Searching, sorting, adding and updating

SalesLogix Account, Contact, Opportunity and Activity records with quick look-ups or filtered search criteria.

✓ Search, sort and review SalesLogix Support Tickets. Tickets may be added and fully edited on Pocket PC; Tickets are read-only on Blackberry devices.

✓ Access to virtually any information available in the SalesLogix database.

✓ User-customizable forms to choose which columns to display.

✓ Easy sorting by any column in ascending or descending order with one simple tap.

✓ Tabbed user interface provides main, detail and other SalesLogix views.

✓ SalesLogix pick lists and other customizations are included in the mobile client application.

✓ Full activity management support, including scheduling and completion of meetings, phone calls, to dos and personal activities on a visual drag and drop calendar.

✓ On Pocket PC, hand-writing recognition for Activities or adding other SalesLogix Notes/History records.

✓ On Blackberry, takes full advantage of the trackwheel to navigate the application.

Simply install the SalesLogix Mobile Personal Edition on your mobile device for synchronization to your SalesLogix remote database:

✓ The Personal Edition provides a low-cost "out-of-the-box" application solution and synchronizes directly with your SalesLogix remote database.

✓ The Enterprise Edition also synchronizes via wireless, dial-up, or cradle sync and both data and application updates can be automatically synchronized to users' mobile devices. Standard Edition has same features but does not include customization tools.

A more detailed SalesLogix Mobile Product Bulletin is available separately.

Enhanced Marketing

SalesLogix Marketing fully integrates lead management, campaign management, and more within the SalesLogix Windows client. Marketing can take advantage of existing SalesLogix features such as Contacts, Accounts, Opportunities, library, processes, reporting functionality, and more.

Marketing is a simple, yet effective tool for marketing and non-marketing users alike. Marketing consists of the following elements:

Capture Leads and Import Lists

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

Leads

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

Qualification

Marketing users can now qualify a lead that is imported into SalesLogix and convert it to a contact and account, and optionally create an opportunity. If a lead cannot be qualified, users can delete it from the system.

Campaign Management

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

E-Mail Marketing

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

Segmentation and Groups

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

Capture Leads and Import Lists

Marketing users can now capture prospective customer information from either a Web page or external list of Leads.

For the Web, the prospective customer can fill in a simple "registration" form. The form does not rely on the SalesLogix Web host, is not required to connect to the SalesLogix database, and may be hosted in a remote location. The form will record all information to a file which can later be transferred and easily imported into SalesLogix.

Simple, standardized Web form to capture leads. Easy to change and customize without SalesLogix Web components or connection to SalesLogix.

Leads may also come from trade shows or purchased database lists. These lists are usually in CSV format with basic prospective customer information.

Marketing includes a Lead import tool to import lists of Leads from a tab- or comma-delimited file. This tool is not the Import Wizard, but it is a very simple interface that even novice users can use to import Lead data. The tool does not import into Accounts and Contacts directly. The data is brought into SalesLogix as Leads so that users can qualify them at a later date. The import interface matches the basic Lead information (name, e-mail, phone, address, etc.) from the list to the Lead record (i.e. schema) without technical complexity.

Import Leads can be customized through SalesLogix Architect, if necessary.

Import Prospects

Prospect List File:
C:\Program Files\SalesLogix\IMP_ACC_CON.csv

Prospect List Fields:

List Field
- IMP_ACCOUNTID
- IMP_CONTACT
- IMP_CONTACTID
- IMP_EXT
- IMP_PHONE
- IMP_POSTAL
- IMP_STATE

SalesLogix Prospect Fields:
- Address3
- Address4
- BusinessDescription
- County
- Description (Address)
- Description (Prospect)
- Division
- Email
- Fax
- FirstName
- HomePhone
- Industry
- LastName
- MiddleName

☐ Show Column Position   ☐ Show All Fields

Owner: Everyone

▼ Match Selected   ▲ Unmatch Selected

Matching Fields:

List Field	Prospect Field
IMP_COUNTRY	Country
IMP_CITY	City
IMP_ADDR2	Address2
IMP_ADDR1	Address1
IMP_ACCOUNT	Company

Imp...   Cancel   Help

Simple import Leads interface – no Import Wizard needed!

Import Prospects Preview

What delimiter separates your fields? Select the appropriate delimiter and see how your text is affected in the preview below.

Choose the delimiter that separates your fields
○ Tab   ○ Semicolon   ● Comma   ○ Space   ○ Other: [ ]

☑ First Row Contains Field Names   Text Qualifier: ["]

Preview (up to the first five records):

IMP_ACCOUNTID	IMP_CONTACTID	P_ACCOUNT	IMP_CONTACT	IMP_
AK5R56666238	CL4U16666238	...sin Whit...	Fanny Hemston	55578
AK5R56666239	CL4U16666239	De...ventures	Leo Sankie	55567
AK5R56666240	CL4U16666240	Out...ed...	Michael Keaton	55564
AK5R56666241	CL4U16666241	Cactu	Ned Flanders	55564
AK5R56666242	CL4U16666242	Saguar	Joey Prosperie	55521

Can import from most delimited text files.

Common SalesLogix fields shown in simplified list – you don't need to know database schema.

Import functionality may be customized with Architect!

Leads

A Lead is a potential sales opportunity that is captured via a marketing campaign, trade show or other lead source. It contains basic contact information which is used to qualify that the prospective customer is valid, does not already exist as a Lead or customer, and is ready to convert to a sales Opportunity.

Marketing has been designed to assists those employees that are tasked to qualify Leads, so that they can realize the highest levels of productivity without sacrificing the quality of converted Leads. It has been designed to help prevent data input from being sloppy or incomplete, and only requires the Lead qualification user to enter the basic, essential information.

Leads are vital to all companies as they represent all potential future customers. However, a substantial number of Leads never become customers. Keeping the Leads separate from Accounts and Contacts is critical to keeping the database "clean" and easier to manage.

Leads are a SalesLogix main view, separate from accounts and contacts.

Capture the basic lead information required to make contact and qualify.

See how we qualify a Lead and convert to account and contact in the next section.

Additional detail info is available if desired, but does not "clutter" with core Lead info.

NOTE: No Activities, Notes, or History for leads. If that level of detail is required, the lead should be qualified and moved into the Sales Process as a Contact and Opportunity.

Leads in SalesLogix are imported into a simple "holding area" where the raw data is added to SalesLogix without compromising the quality of existing contact and account data. Once the data is verified and qualified, the Lead can be converted to, or merged with a Contact and Account.

New to v7, you can Mail Merge to Leads with history and attachments added to the Lead. All information is moved to the Contact with the conversion process.

Qualification

Marketing addresses the primary purpose for capturing Leads, which is to determine if they are valid, are interested in purchasing, and merit attention from sales. In other words, it helps to answer the question: "Is it worth turning this lead into a sales opportunity?" Marketing supports this process by providing a check-list of questions that a lead must pass and allowing the lead processor to convert those Leads that do pass.

This process is fairly simple and is called qualification.

Marketing assists employees that are tasked with qualifying Leads by allowing them to answer simple questions as they are researching a lead through phone calls, email, or any other method. This list of questions is minimal so that lead processors can process the volume of Leads that is expected of them. In addition, different 'checklists' can be created for different product lines or services. Up to eight questions can be defined for each checklist. Leads can be qualified by answering questions like:

✓ Is this a real person with real info?

✓ What is the business need?

✓ Is budget available?

✓ In what timeframe do they wish to purchase?

✓ Who is the decision maker?

SalesLogix Marketing does not require the lead processor to capture detailed information about the lead. More detailed information can and should be captured once the lead has been qualified and converted to an account/contact and opportunity.

Marketing users convert Leads to an account/contact by clicking on the Convert Qualified Lead button. The Convert Prospect window allows users to see existing Accounts, Contacts or Leads that are potential duplicates, and confirm whether or not the lead really is a duplicate. If a contact already exists for that lead, the lead can be merged with that contact. If only the account exists, the contact can be added to the account.

Once a lead has been qualified and converted to an account and contact, the lead is then purged from the system. Leads that do not meet the criteria defined by the checklist can be deleted, which also purges them from the system.

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Convert Prospect

Prospect

Company	First Name	Last Name	Title	E-mail	City/State/Po...
Williams Consulting	George	Agen	Advanced Technici		gono, OH 37405

Potential Contact Matches (3 found)   ☐ Merge with selected Contact   **Conflicts:** Existing Contact wins ▼

Account ▲	First Name	Last Name	Title	E-mail	City/State/...
Darsey Technologie	George	Calambro	MIS Director	George@DarseyTe	Columbia, MD 21045
Erlandson's Estate (	George	Fager	Manager	George@Erlandson	Topeka, KS 66611
Independant Servic	George	Kanopoulos	Owner	George@Independ	Toronto, ON M4S 3C4	(416) 555-0095x247

Potential Account Matches (0 found)   ☐ Add Contact to this Account   Conflicts: Existing Account wins ▼

Account ▲	Industry	Web	City/State/Postal Code	Main Phone	Type

Matching
☐ Match all selected filters: Filters ▼
☑ Match exactly (For example, Acme Inc. and Acme Incorporated will not match)

Conversion
☑ Create Opportunity after Prospect conversion

[Convert] [Cance...]

Callouts:
- Simple interface to convert Lead to account/contact with ability to see potential matching records
- Merge with existing contact if dupe found
- Add lead as contact to an existing account
- Define filters and matching rules for dupe checking
- Convert will purge the lead and move all data to the account/contact records
- Can automatically create an Opportunity when converting

Campaign Management

Marketing now offers the ability to design, organize, and perform outbound campaigns more effectively. Marketing campaigns are now a main view in SalesLogix. Users can create new campaigns or copy from an existing one. Campaigns can now include multiple lead sources and products. One of the most powerful new features in Marketing is the ability to define the target list for each campaign. Using simple filters, users can quickly define a list of targets from Leads, existing Accounts or Contacts.
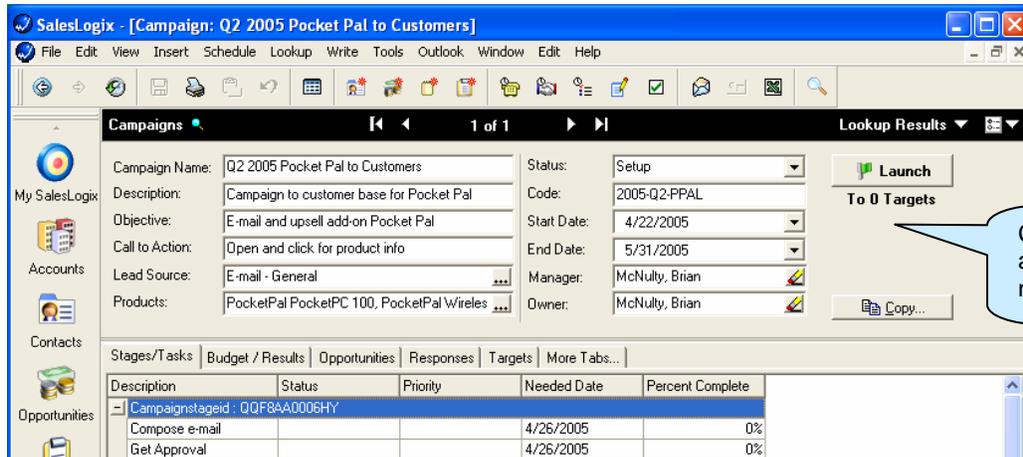
Campaigns are rewritten as main view with several new features.
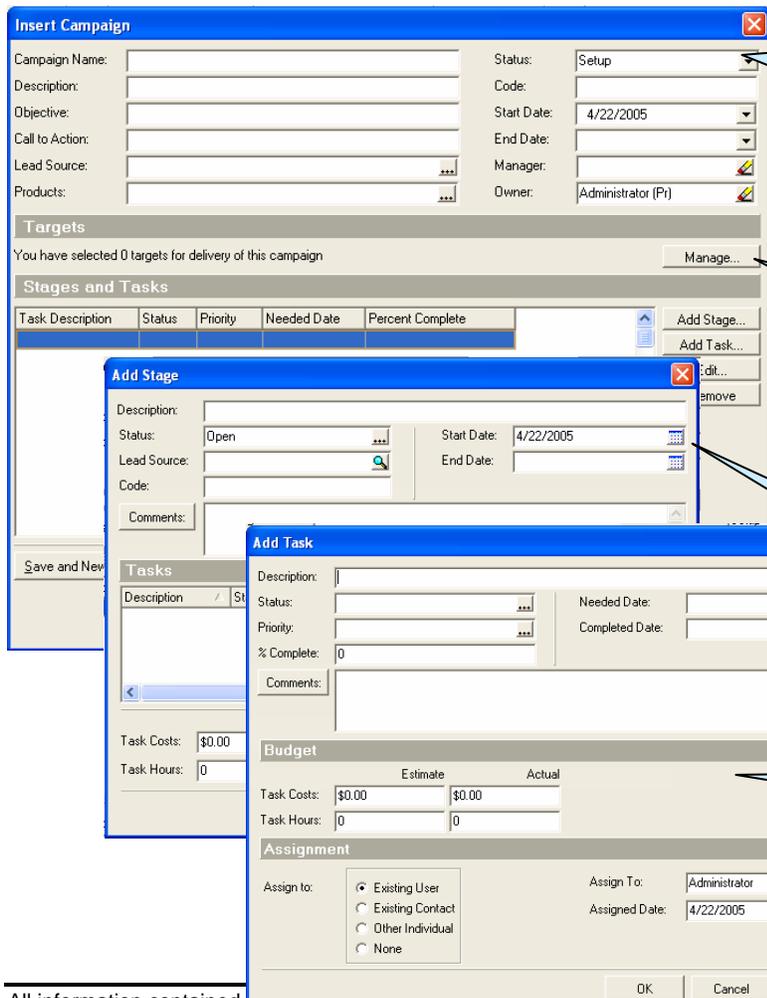
Simple to define a new campaign, or copy portions of an existing campaign. Can include multiple lead sources and products that are the focus of a campaign.

Simple interface to choose and manage the "targets" for this campaign. No Query Builder required. See Groups and Segmentation in later section.

Define the stages and tasks that will be tracked with this campaign.

Track stage information with any number of tasks. Includes roll-up of task costs.

Filtered list interface to manage the targets and responses for a campaign. Simple interface to launch tasks related to the targets.

Easy to track responses at the campaign, lead, account, or contact level.

E-Mail Marketing

SalesLogix has integrated with EmPulse to provide advanced e-mail marketing campaign support. E-mail marketing is a one-click export of a list/Group to EmPulse for mass e-mail marketing campaigns. This supplements the SalesLogix mail merge functionality, and scales to hundreds or even thousands of e-mails.

E-mail Marketing is provided as a service through EmPulse, however, it does not require a separate server charge; a simple Windows service is installed on the SalesLogix Server to transfer data to and from EmPulse. There are service charges based on the volume of e-mails delivered. Special SalesLogix pricing starts at $99/mo for 1,000 e-mails with additional e-mails starting at $35/1,000 e-mails.

EmPulse's features help users to create and send email campaigns that drive higher response and participation. It

also incorporates email marketing best practices directly into the software to help any size organization, across all levels of technical ability, build more effective campaigns every step of the way.

Campaign Creation and Management

- ✓ Testing matrix
- ✓ Template library
- ✓ Content library - upload images and files
- ✓ Cross platform compatibility - MAC or PC
- ✓ Campaign scheduler - schedule campaigns for future launch
- ✓ Link aliasing - customize your link names (in plain English)
- ✓ HTML drag 'n drop WYSIWYG editor - no HTML knowledge required
- ✓ Multi-mode send options (text, HTML, Multipart/AOL)
- ✓ Content spell checker
- ✓ Supports rich media

Personalization

- ✓ Personalized subject lines
- ✓ Personalized message content

List and Address Management

- ✓ Automatic e-mail address de-duplication
- ✓ Campaign bounce management
- ✓ Campaign unsubscribe management
- ✓ Bounce retry processing
- ✓ Unlimited addresses

Automatic Data Transfer from SalesLogix

- ✓ E-mail list import directly from SalesLogix
- ✓ Bulk delete/update
- ✓ 55 custom demographics from SalesLogix
- ✓ Responses automatically transferred into SalesLogix with click-through information

Anti-SPAM controls

- ✓ SPAM rater
- ✓ CAN-SPAM compliance checklist

Reporting

- ✓ Real-time
- ✓ Bar, column, pie charts
- ✓ Data exports to screen, Excel or TXT zip files
- ✓ Campaign-based: open, click, unsubscribe, bounce (hard/soft), referrals

Web Surveys

- ✓ 3 question types
- ✓ Unlimited surveys
- ✓ Required answers
- ✓ Add a logo custom branding
- ✓ Important note: Web surveys are available as part of the EmPulse service but detailed survey results are not imported into SalesLogix at this time

Deliverability

- ✓ Email content rater
- ✓ Domain monitoring
- ✓ Abuse desk management

Other

- ✓ Unlimited upgrades - at no additional charge!
- ✓ Fully configurable on which SalesLogix users are authorized to use the service
- ✓ Secure (SSL) data transfer between SalesLogix and EmPulse
- ✓ SalesLogix integration provided by a Windows Service server-side to eliminate security concerns
- ✓ Remote users will synchronize all outgoing e-mail campaigns and incoming responses as part of regular SalesLogix sync process – no other Internet access or firewall settings required client-side

For more information, take a tour at www.emailpulse.net.

Important note: do not sign up for service at the Web site as you will not receive special SalesLogix pricing, A special link will be included in SalesLogix for activating your integrated account with discounted pricing.

Segmentation and Groups

The fundamental key to marketing success is to allow the user to easily select to whom the campaign is targeted. SalesLogix Marketing allows users to quickly filter potential targets to the specific list needed for a campaign. Users have a number of fields available to them for which they can apply a filter to potential targets. This is an easy-to-use feature that any marketing or sales professional can use. This is one of the most important features of SalesLogix Marketing, as it enables marketing professionals to extract lead/customer data so marketing can market to them.

"Targets" are segmented Leads and Contacts for a campaign that are contacted as part of the campaign communication. Targets are managed as part of the campaign with a simple selection interface.

Select which leads/contacts to include

State, Zip, SIC allow multiple values, comma separated

How Many? Shows dialog count of the query

Clear All clears all fields but not checkboxes

Add From Group allows them to select from prospect or contact group

Preview shows a grid of results based on filters applied

Add Targets adds the results to grid below

Remove allows you to remove by query as well (e.g. can select all CA then remove Los Angeles)

Running count of targets

Reporting

Campaigns will include a tab to view the budget, costs, response, and resulting Opportunities for the campaign. Marketing users will be able to monitor the progress of each campaign.

Budget	Budget	Actual	Variance
Task Costs:	1800.00	1635.25	164.75
Expenses:	0.00	157.24	157.24
Calculated Cost:	1800.00	1792.49	7.51
Target Cost:	2000.00	1792.49	207.51

Response	Potential	Expected	Actual	Variance
Contact Response Qty:	1363	27	3	24
Contact Response Rate:	100.00%	1.98%	0.22%	1.76%
Prospect Response Qty:	1363	27	3	24
Prospect Response Rate:	100.00%	1.98%	0.22%	1.76%

Cost Metrics	Budget	Actual	Variance
Cost / Target:	.734	.658	.076
Cost / Response:	333.333	298.748	34.582
Cost / Opp:	1000.000	896.245	103.755
Cost / Sale:	1000.000	896.245	103.755

Opportunities		% Rate	Qty
Open Potential:	0.00	Response to Opp: 67%	2
Open Weighted:	0.00	Open Opportunities: 0.00%	0
Actual Won:	1500.00	Opportunities Won: 100.00%	2
Actual Lost:	0.00	Opportunities Lost: 0.00%	0

In addition, key reports to analyze the effectiveness of a campaign are included:

- ✓ Cost of campaign versus budget

✓ Cost per lead (how much does each lead cost?)

✓ ROI of campaign relating cost to the actual won Opportunities (should I do this again?)

Customer Service & Support Features

SalesLogix Customer Service and Support features are now fully integrated into the SalesLogix Client. There is no longer a separate Support Client and the previous Support Client will not operate in SalesLogix v7.

Customer Service is fully available in the Web Client. Customer Support features are not available via the Web Client in this release.

Major components of Customer Service & Support include:

✓ Assets – Products delivered to a specific customer

 o Opportunity Products – move Products to Assets

 o Serialize Assets

✓ Tickets

 o Associate Asset to Ticket

 o Add "Parts" to Ticket

 o Ticket Activities = "Labor"

 o Associate Contract to Ticket

✓ Service Contract – determine service level

✓ Returns – track returns and associated costs

✓ Standard Problem Resolution – quick and consistent answers

✓ Defect – track and improve quality of products

Assets (formerly Account Products)

There are a number of enhancements to Assets in v7.

✓ When a Sales Order is completed with products (or an Opportunity if no Sales Order exists), products, the user is prompted which line items should move to Assets (formerly Account Products)

✓ If Assets are serialized, can easily convert from a single line item to multiple line items with serial numbers

✓ Assets may also indicate if the Asset has been returned or is an evaluation unit

✓ Will be able to easily lookup, associate, and view Assets related to a Ticket and a Return

✓ **While Assets will be the interface to the User, schema will remain as "Account Products" to eliminate data conversion and other code changes.**

In addition to existing information additional attributes about an Asset are available including Quantity, Last Updated (MODIFYDATE), Updated By (MODIFYUSER), Comments, Opportunity description, Sales Order #

May also include "generic" environmental information relating to a unique serialized product

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Service Contracts

Contracts have been revised to make it easier for the user to understand and utilize.

Contracts are a main view so may include Groups, add tabs to the interface, and generally work like any standard entity

Users can easily specify and view which Assets are included under the Contract

"Terms" of the Contract are revised and simplified based on your feedback!

Grace Days do not modify End Date or Remaining fields

Expiration applies to all Contract types

Administrator may control add, edit, delete functionality via standard security measures

Returns

From a front office perspective, RMAs or **Returns** are repairs of a customer's equipment. There are generally no financial transactions associated with a repair, unless it is found that the repair is not covered under warranty or contract. Generally, when an issue is found the customer works with the support organization to determine if it is a misunderstanding, inappropriate use of the product, or a defect. If it is a defect which can be easily resolved, a part or replacement product may be sent to the customer with the pre-set expectation that they will either trash or return the defective product for repair. If the defect requires specialized skills to resolve, and the product is small enough, it will be sent back to the company for repair. This can be done either through hot swap (replacement is sent first, then the defective product is returned), cold swap (defective product is returned, repaired and then sent back), or exchange (replacement and defective product are shipped simultaneously). If the product is not small, it may be necessary to send an engineer out to fix the issue on-site.

Returns will be most likely touched by different people in the process. A return is likely to be initiated by a support or customer service person. When the product arrives or leaves, it will be documented unpacked, and tagged by a shipping clerk. The technician repairs it. Alternately in a field service situation, a remote technician may be the one creating the return, fixing the issue with product from personal inventory, and shipping the defective product back to the main office.

While these types of returns do not generally require a financial transaction because it is temporary custody of customer product, there is a liability associated with having the customer's product. So returns are tightly tracked and monitored through the repair process.

✓ From an Account, easily see in tab view the associated Returns

✓ From a Ticket, easily see in tab view the associated Returns as well as enter new Returns

Return Details Tab (receiving a return from customer)

✓ Display the name, phone and email of the Return Contact (default Contact same as on main view but may be changed).

✓ No need for address – this Contact address is already part of Contact record. We simply don't need to track where it is coming from!

✓ Ability to add some notes about this return. Just a open text/memo field.

✓ Ability to add/remove the assets related to this return: add a grid with Product Code, Product Name, Serial Number

✓ Checkbox to specify which assets are returned. The available assets which can be returned are limited to assets belonging to the account.

Ship To Tab (sending return back to customer)

✓ Display the name, phone and email of the Ship To Contact (default Contact same as on main view but may be changed).

✓ Ability to default the address information from the Ship To contact, but stored separately. Include a Company line and an attention line since may be different from the Account/Contact (in case of a drop-ship).

✓ Ability to add/remove the assets related to this shipment: add a grid with Product Code, Product Name, Serial Number

✓ Include Ship Via, Tacking number, and Special Instructions fields

Standard Problem/Resolution

Problem Resolution Assistance is a quick way to respond to common customer questions, commonly Product-related, incorporated into knowledgebase.

For Scorpion, Standard Problem/Resolution will be minimal "port" of same features in Support Client!

✓ One Problem may have multiple Resolutions

✓ Ability to add and edit the resolutions associated with each problem

✓ A Resolution may be related to many Problems
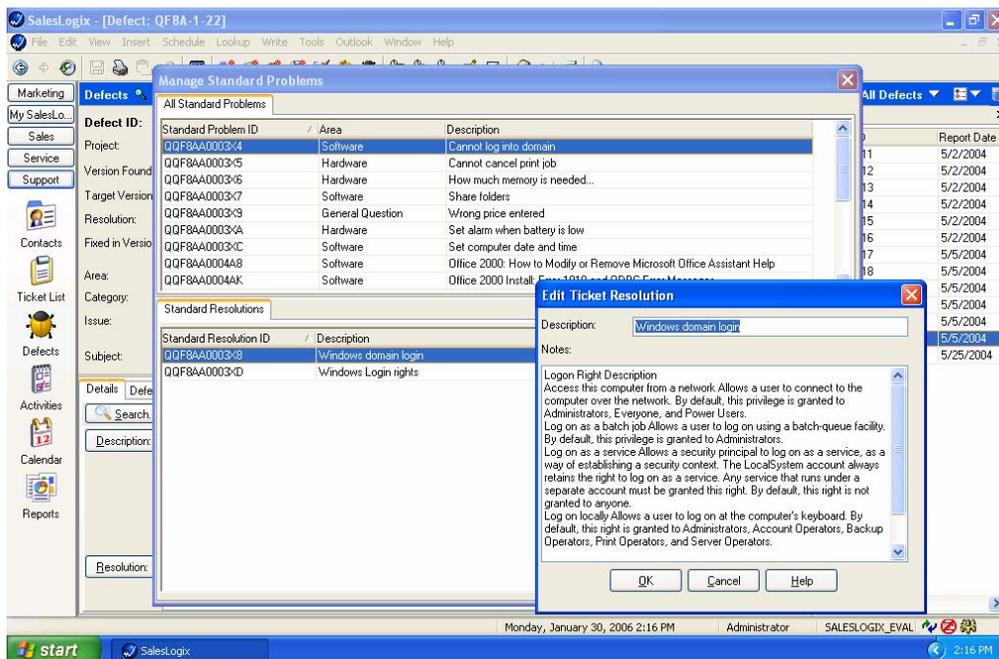
Defects

Defects are used to track deficiencies or faults in a product whether it is software or a manufactured item. Defects can be created and utilized by a number of different personas. There may be individuals who are specifically testing and looking for defects, there may be technicians who have received a bad product and discover a defect which needs to be fixed, there are people who are supporting customers who find an error, and there may be people who are focused only on fixing defects others have discovered.

Understanding Users of Defects

Technical individuals are measured by whether they respond within established time frames, and take care of priority issues. However, a more critical aspect of their job is how effectively they either diagnose, test or repair customer problems. For this reason, support users tend to be technically knowledgeable through training or on the job experience. A number of individuals on a team are generalists, while a few are experts who specialize on specific problem areas. New or specialized knowledge needs to be shared to increase the ability of the whole team to solve problems.

User Scenario Questions:

- I may have found a new defect. Does one like this one already exist?
- This is a new defect I need to log.
- I have tasks or defects I need to fix. What do I work on in what order?
- I have resolved/completed tasks or defects I need to verify. What do I test in what order?
- I need to balance the workload of the individuals fixing or testing defects. So I need to know how many and what people are working on what issues.
- This defect is a duplicate of another. How do I clean it up?
- I need to compile a list of defects associated with a particular version, a target version to be fixed, and the defects that are still outstanding by area and category.
- I need to include this defect in the knowledgebase.
- I want to keep track of how long it takes to resolve an issue.

Overview

✓ User date/time stamping with automatic entry in blank memo fields if the user option is True

✓ Ability to view what defects each account has reported at the Account level with drill-down to the defect detail

✓ Ability to associate and disassociate Defects to a Ticket. From the Ticket may add or open the associated defect.

Procedures

✓ ***Procedures will be eliminated and will not be migrated from Support Client***

Productivity Enhancements

User Productivity

Modern XP Look

✓ Windows XP themes apply to your SalesLogix Windows Client

✓ Customizations with Active Forms do not need to change and will automatically take advantage of updated UI elements (Legacy Forms remain as-is)

✓ NavBar and Toolbar support icons, not just Bitmaps, with or without text

✓ Navbar can be resized by the user

✓

Calendar User Interface

✓ Updated calendar UI to more closely match the style of Outlook

✓ View and confirm unconfirmed activities on the calendar

✓ Customization of the Calendar interface is not available

SAGE CRM SALESLOGIX

✓

✓
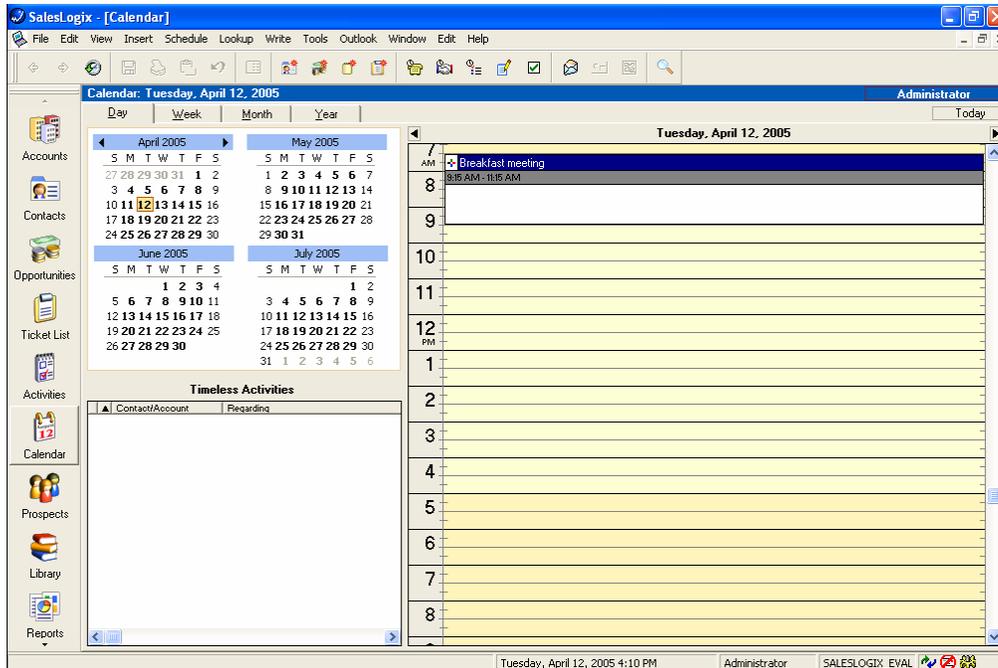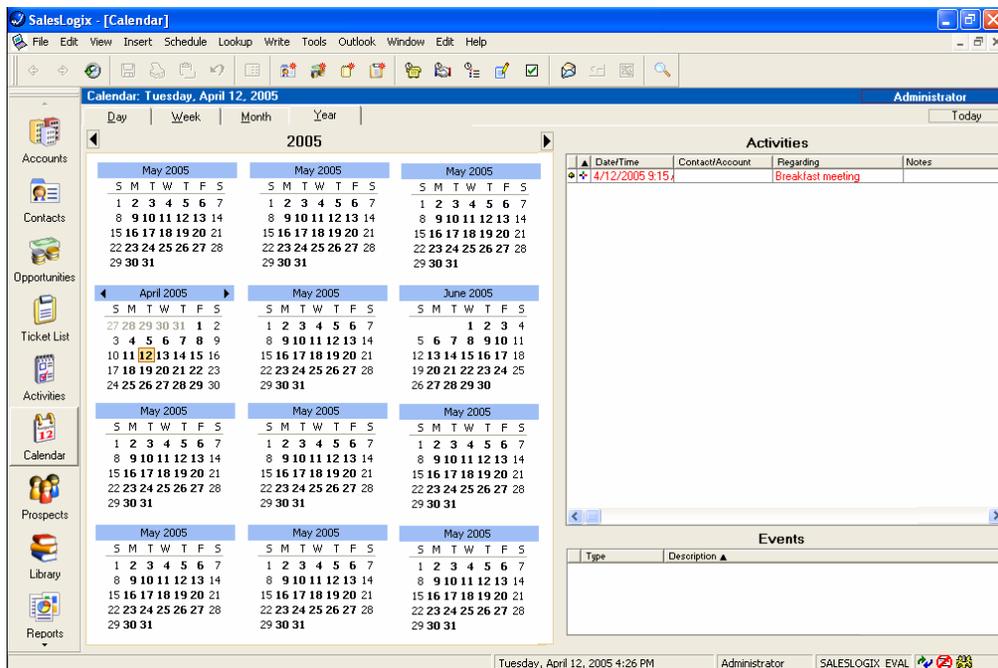
Activities

Activity Reminders

✓ Replace the Activity Manager (the dialog that opens whens SalesLogix starts that most users ignore) and Activity Alarms with Activity Reminders dialog to be able to view activities when opening SLX and ignore, delay/snooze, reschedule, complete, or cancel from one interface

✓ Activity Reminders will also display unconfirmed Activities so the user does not miss appointments

✓ Eliminates multiple alarm popups
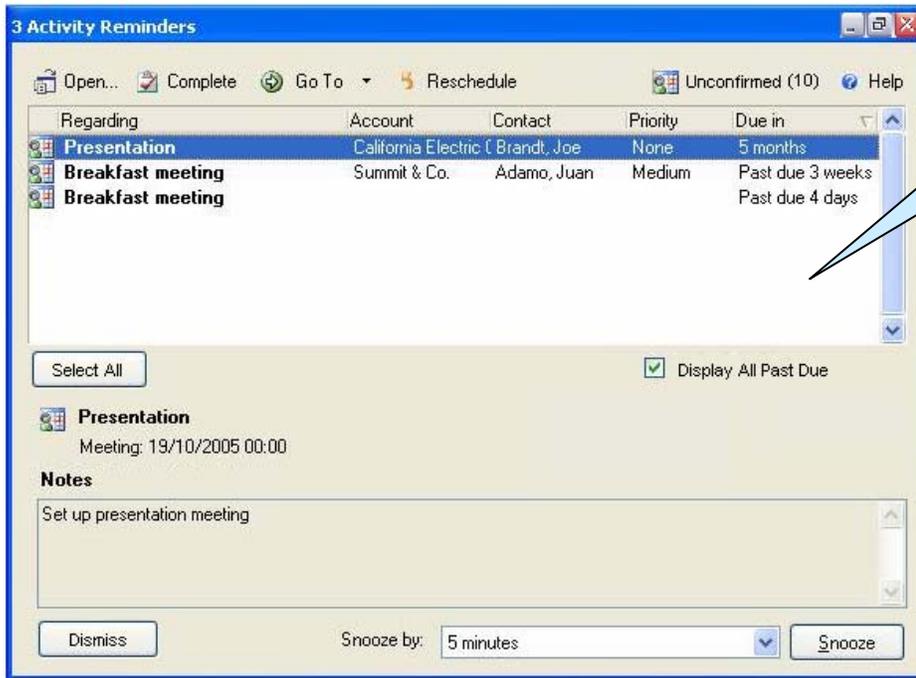
UI subject to change

<u>Not</u> an Architect view

✓

✓ There should also be a 'complete as scheduled' button which will quickly close the complete activity dialog using the values already defined.

Activity Security

✓ Activities should include security so SpeedSearch and other interfaces can respect security even if not associated to an Account (SpeedSearch will return all activities in current release because no seccode).

History/Notes Security

✓ History/Notes should include security so SpeedSearch and other interfaces can respect security even if not associated to an Account (SpeedSearch will return all history in current release because no seccode)

Working with and Customizing Activity Forms

✓ Most Activity-related forms have been changed to simplify for the user

✓ Added ability to customize several aspects of the Activities UI

✓ Fields may be added to Activities, keep reading for more details in upcoming section

✓ The "General" tab of the Schedule Activity dialog is an Active Form which may be customized

✓ Schedule Activity will default to valid Activity and internal logic will attempt to ensure a valid Activity, even if customized heavily

General tab is fully customizable Active Form

Members, Resources, Recurring tabs are not customizable and may not be removed or altered in any way

✓

✓ The Complete Activity dialog is an ActiveX form which may be customized

Dialog contains fully customizable Active Form

Dialog itself may not be altered

✓

✓ Activities main view grid is not customizable, but summary pane at the bottom is Active Form

Activities API

✓ New APIs to "hook" into Activities as well as ability to customize several aspects of the Activities UI

✓ The list of events around Activities are basically before and after you Add/Edit/Complete/Delete an Activity:

- o Prior to displaying the dialog for new Activity

- o Upon closing the Activity dialog (OnScheduledActivity script I believe)

- o Prior to editing Activity (not the same as first)

- o Upon closing the edit dialog (not the same as second)

- o Prior to displaying the dialog to complete an Activity

- o Upon closing the completion dialog

- o Prior to deleting an Activity (so can interrupt and prevent deleting)

- o After user chooses to delete an Activity (for any cleanup)

✓ History is closely related to Activities and will include the following events:

- o Prior to inserting a History item

- o After inserting a History item

Custom Fields for an Activity

✓ An activity can be customized to include additional fields

✓ If the fields are added to History schema as well (exactly same schema), will automatically record the custom Activity fields to history

Activity Defaults

✓ The following defaults should be used for Activities (most are already in place, this is full reference):

Activity Type	Include in Reschedule (Rollover)	Duration	Timeless	Default Reminder	Enable Sound	Follow-Up Type	Carry over notes	Date	Time	Contact	Regarding	Category
Phone Call	TRUE	15 Min.	FALSE	15 Minutes	None	Phone Call	TRUE	Month	On	On	On	Off
Meeting	FALSE	60 Min.	FALSE	15 Minutes	None	Phone Call	TRUE	Month	On	On	On	Off
To-Do	TRUE	None	TRUE	None	None	None	TRUE	Month	Off	On	On	Off
Event	FALSE	All Day	TRUE	None	None	None	TRUE	Calendar	Off	On	On	Off
Personal Activity	FALSE	30 Min.	FALSE	15 Minutes	None	None	TRUE	Month	On	On	On	Off
Note	FALSE	Field is Disabled	TRUE	None	None	None	TRUE	Off	Off	On	On	Off

Reporting

✓ Update and simplify Report Manager interface for users so easier to find/organize reports

✓ Need to be able to specify conditions and filters for the reports without referring to documentation (e.g. be able to take a contact report and print it for a group of contacts in a given format quickly)

✓ Produce reports with improved Crystal Reports XI R2

✓ All existing reports are automatically converted during upgrade process, no additional conversion needed in most cases

✓ Report Manager interface may be customized
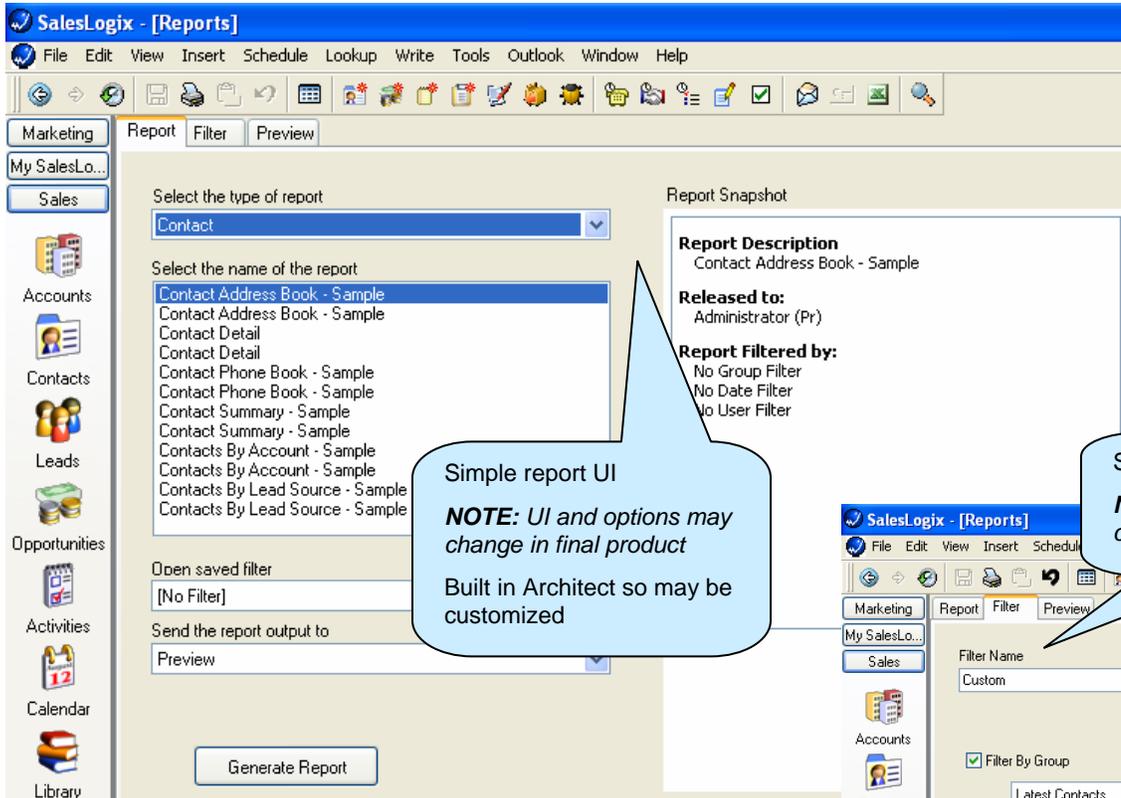
Simple report UI

NOTE: *UI and options may change in final product*

Built in Architect so may be customized

Simple filters for reports

NOTE: *UI and options may change in final product*
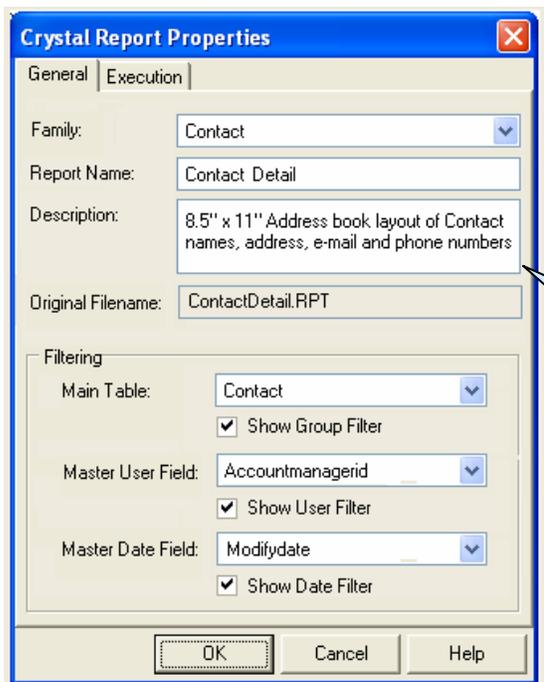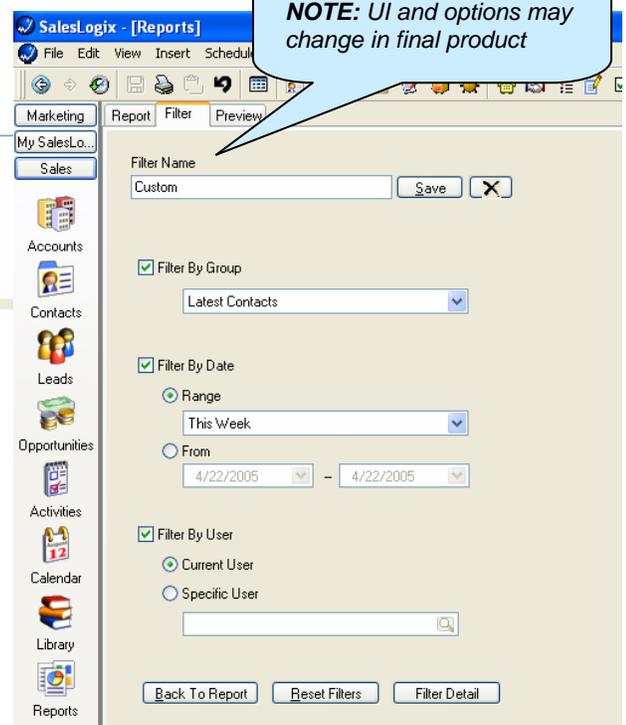
Ability to add descriptions and comments to reports and control filtering

Copy/Move Contact Feature

This functionality has always been weak and ignored custom records associated to valid accounts, or left Tickets and RMAs in a state where the Ticket has an Account and Contact which do not belong together any longer. This change is intended to correct these issues, gives users more options, and satisfies the following use case scenarios.

Scenarios:

✓ Contact has moved from one subsidiary to another subsidiary, or has moved from one customer to another customer

✓ Contact was incorrectly created under the wrong account, whether manually or via ISA or other external process

Features:

✓ Must be able to either Create a new Contact based on the original Contact, or move the original Contact to a new Account

✓ Must have the ability to move all Contact associated items (Opportunities, Tickets, Attachments, RMAs) to the new Account (existing functionality) OR keep all items with the original Account OR keep all items with the original Account but copy the Contact associated History or Activity to the new Account

✓ Must be able to reassign Contact associated items that remain with the original account to someone else from the original account. By default this will be the Primary Contact.

✓ Must track on each record what changes were made

✓ Must track all finished items in history

✓ Must be done in script so can be customized and extended

SalesLogix Links

✓ Ability to copy a URL-like link of SalesLogix records to clipboard for any main view

✓ Paste into e-mail for another SalesLogix user – they click link from e-mail to open SalesLogix and go to record (link will only work if Windows Client is installed)

✓ Applies to Windows Client only, does not apply to Web

Lookup Improvements

Several basic improvements requested by users and developers including:

✓ User can resize dialog and scroll grid horizontally

✓ Grid columns are sortable and rows can be multi-selected

✓ Lookups will include localizable display name that appears in title bar and on dialog

✓ May define multiple layouts for one table/column lookup (will require adding a name identifier – should work as today if name not specified so no compatibility issues)

Leads

✓ Mail Merge supports merge to Leads

✓ Leads includes a History tab similar to Contacts

✓ History moves to Contact record when converted

- ✓ Records Leads information to separate "BI" table in the background so can do analysis on converted/deleted leads
- ✓ Does not include Activities at the Lead level in this release

Web Client Updates

- ✓ Activities, Calendar, Reporting, Tickets, Assets and other features in Web Client will change in similar fashion to the Windows Client changes outlined above
- ✓ Full Customer Support and Marketing features are NOT included with Web Client at this time
- ✓ All tags will be xHTML compliant
- ✓ Style sheet issues are resolved

Administrator Productivity

Sync Changes

- ✓ Secure Internet-based sync option (HTTPs) – no longer requires FTP or RAS (network) sync so you can sync with any Internet connection
- ✓ Automatic handling of the GlobalID for sync process to eliminate unneeded sync of non-Account related records
- ✓ Attachment logging performed automatically
- ✓ Synchronizaion Server will offer better muti-threading to speed subscription rules

Simplified Remote Installation

- ✓ Admin cuts Remote (.SXD file) which can be clicked on by user to auto-attach (generally no need for the AttachRemote utility to be run by users)
- ✓ Combined with a silent network install, this can greatly simplify the IT involvement with distributing remotes in many environments
- ✓ SpeedSearch on Remotes may be scheduled separate from Admin. Typically, the host schedule is late night when laptop is OFF. Therefore, the indexes are generated when the laptop is started, delaying the user. Now providing a very simple interface so users can manually index or set a simple schedule on Remotes.

Managing Sales Processes

- ✓ Sales Processes are configurable in SalesLogix Client so do not need full Admin rights to manage
- ✓ Manage Sales Process function can be secured and released to only specific users with standard menu security

SpeedSearch Updates

✓ Index location stored in DB so that clients just go to DB to get path, rather than communicate through SpeedSearch server. Server is required only to index database, if server goes down, will no longer affect client search.

Installation, Upgrade, and Conversion Considerations

✓ Will now generate a single file, executable remote package that is "one-click" install for remote users (no need to "attach" or know MSDE admin passwords; may need to be local machine admin)

✓ Installs conform to MSI standards for easier install and automated deployment

✓ Currency "Float" fields are converted to "Currency" Data Types - this is currently a problem because Floats are not accurate and can introduce rounding issues

✓ Will convert Defect numbers (similar to Ticket number conversion in v6.2 upgrade)

✓ Will convert RMA numbers (similar to Ticket number conversion in v6.2 upgrade)

✓ Will require and install .NET Framework 2.0

Import Wizard Updated

✓ Several enhancements to the Import Wizard utility including a field mapping view, Vbscripting during import, import preview, and more

Field Mapping – List View

Import data files or tables

Table	Field
uk	TYPE
uk	MACONOMYREF
uk	LEADSOURCE
uk	EXTERNALACC..
uk	DBNO
uk	SEGMENT
uk	SUBSEGMENT
uk	ACCOUNT
uk	ADDRESS1
uk	ADDRESS2
uk	ADDRESS3
uk	ADDRESS4
uk	CITY
uk	COUNTY
uk	COUNTRY
uk	POSTAL
uk	MAINPHONE
uk	FAX
uk	EMPLOYEES
uk	PREFIX
uk	FIRSTNAME
uk	LASTNAME
uk	SALUTATION
uk	
uk	
uk	
uk	
uk	

- Map Field
- Custom Map
- Unmap
- Properties

SalesLogix tables

Table	Field	Map 1
ACCOUNT	DONOTSOLICIT	
ACCOUNT	SCORE	
ACCOUNT	TICKER	
ACCOUNT	SUBTYPE	
ACCOUNT	LEADSOURCEID	
ACCOUNT	IMPORTSOURCE	
ACCOUNT	ENGINEERID	
ACCOUNT	SALESENGINE...	
ACCOUNT	RELATIONSHIP	
ACCOUNT	LASTHISTORY...	
ACCOUN		
ACCOUN		
ACCOUN		
ACCOUN		
HISTOR		
HISTOR		

Save

> New field mapping view to easily see all fields that were mapped in the wizard and allow changes to maps in one view

> Easier to manage mapping and new interfaces to make complex functions like conditional mapping more useful

Field Map Properties

Value (may add multiple values):

MAINPHONE

Map to → SalesLogix field:
ACCOUNT.MAINPHONE

Display map name as:
96 Accounts JandK.MAINPHONE

- Add
- Edit
- Remove

- OK
- Cancel
- Help

Conditions

Map the above value to this field
- ● as the default field map.
- ○ if all of the following conditions are true.
- ○ if one or more condition is true.

Value 1	Operator	Value 2

- Add
- Edit
- Remove

Value Properties

Value equal to
- ● Import data field — 96 Accounts JandK.EXTERNALACCOUNTNO
- Conversion function — VBScript — Edit parameters...
- Resulting value — Script(EXTERNALACCOUNTNO)
- ○ System Constant
- ○ User-defined V

> Custom Vbscripts may now be used as conversion function during import

Import Wizard [Administrator]

Finish

You are now ready to begin importing. If you wish to save the import m recommended (not required) that you do so before running the import.

Import Status

ACCOUNT record i
No fields were mapp
ACCOUNT record i
No fields were mapped
ACCOUNT record inserted ; ID: AQF8AA00000P; Count: 6
No fields were mapped
ACCOUNT record inserted ; ID: AQF8AA00000Q; Count: 7
No fields were mapped
ACCOUNT record inserted ; ID: AQF8AA00000R; Count: 8
No fields were mapped
ACCOUNT record inserted ; ID: AQF8AA00000S; Count: 9
No fields were mapped
ACCOUNT record inserted ; ID: AQF8AA00000T; Count: 10
Error committing transaction: The statement has been terminated. :
Violation of PRIMARY KEY constraint
'ACCOUNTSUMMARY_ACCOUNTID_PK'. Cannot insert duplicate key in
object 'ACCOUNTSUMMARY'

Import Complete!

Save < Back Finis

> New options to limit import and commit inserts to database for testing and improved performance

> Show status of import as the records are processed

> New duplicate-checking options

Duplicates — Options...
- ● Do not check
- ○ Skip if duplicate
- ○ Prompt if duplicate

Database Options
- ☑ Log changes for synchronization
- ☐ Limit import to 5 ⬍ inserts
- ☑ Commit to database every 500 ⬍ inserts. Commit Now
- ☐ Preview

> Preview the import per-record

Customizable Integrity Checker

✓ Integrity Checker is basic database maintenance that can be performed by a non-DBA

✓ Basically the utility works like this:

  o Runs tests that identify database issues

  o Identifies, summarizes, and counts the number of records to be fixed

  o Allows the Admin to review the tests and SQL commands to fix issues

  o Fixes the records

  o Saves results to file

✓ V7 adds a customizable Integrity Checker with existing features plus several new features:

  o Add/remove tests

  o Easily toggle multiple tests on and off

  o Only display the tests which have qualifying records

  o Ability to stop running tests/repairs. (If not able to stop during a specific test/repair, then stop before the next one starts.)

  o Check query validity while in editor

  o If there is an error running the test or executing the repair, need to display which test had the error, even if the option is turned off to only display the tests which have qualifying records

  o Ability to know how long the process took, which test collection is being used, who is logged in, and what database they are applying changes to

✓ Launched from Administrator like today, utility is a separate application which also be launched separately

Customizing Integrity Checker

✓ Integrity Checker now has library files which include one or more tests which may be customized

✓ Libraries are INI files in plain text with a file extension of .SXC

✓ Integrity Checker now includes a Test Editor to add/edit/remove tests from a library

  o NOTE: SalesLogix.sxc should not be modified as it is versioned and may be replaced in future SalesLogix releases or service packs

✓ Integrity Checker initially loads the SalesLogix standard library of tests (SalesLogix.sxc) unless:

  o SLXDBChecker.Ini file is present and the Library="[test library full path filename]" is set

  o OR the command line parameter /L "[test library full path filename]" is present

  o The command line parameter supersedes the .ini file in determining the initial test library

✓ The Administrator may then load multiple test libraries or clear and load different test libraries

✓ Tests may also utilize VBscript functions with a simple VBscript editor

  o Two out-of-the-box tests contain VBscripts which may be used as examples

    ▪ Test "Attachment: Attachments with bad file/name path" uses the SLXAttachments.VBS script to check the filesystem to see if the attachment exists

    ▪ Test "Library: Library Documents with bad file/name path" uses the SLXDocuments.VBS script to check the filesystem to see if the document exists

  o The VBscript executes for every record so use caution as script execution may hurt performance

✓ Some helpful tips for customizing Integrity Checker

  o **Oops** - If you corrupt or accidentally change the standard tests, simply rename the SALESLOGIX.SXC file and a new one will be created automatically. Same for VBS files.

  o **Custom Tests Best Practice** – Rather than edit the standard test, we recommend that you create a separate library. That way, when the system is upgraded, custom tests are not affected.

  o **Merging Test Libraries** – You can load multiple libraries at the same time. With multiple libraries, you can choose to Save or Save As to create a new library that contains all tests.

✓

Developer Productivity

Architect Projects

✓ Architect Projects will include all plugin elements, not just Forms and Scripts

✓ Merge most Bundler features into Architect Project – Bundle becomes just a "save" function to save to SXB file

✓ Save and update individual plugins and elements within the bundle

✓ ***More information to be announced with Beta product***

SpeedSearch

✓ SpeedSearch on Remotes should be scheduled separate from Admin. Typically, the host schedule is late night when laptop is OFF. Therefore, the indexes are generated when the laptop is started, delaying the user.

✓ Allow a very simple interface so users can manually index or set a simple schedule on Remotes.

Automatic What's New

✓ What's New will be automatically (triggered) for all main entities (no script code required)

Database Manager Enhancements

Custom Fields in Base Tables

✓ Allow custom fields to be added to base tables via DB Manager (eliminate need for "extend" table to add a single field).

✓ We must ensure that the user's fields will never match core SalesLogix fields so will force a defined prefix ("C_") not used by SalesLogix so that future schema is not negatively affected in an update

✓ *If you customize some schema, functions may not work as expected so use carefully (e.g. copy user profile will not copy custom schema added to user table)*

Enabling Non-SalesLogix Tables

✓ Any tables owned by SYSDBA will display "disabled" in DB Manager

✓ From Properties of the table in DB Manager, you can "enable" the table which will make the required security changes to promote the table so it can be fully utilized in SalesLogix

Working with Views in SalesLogix

✓ Any views owned by SYSDBA will display "disabled" in DB Manager

✓ From Properties in DB Manager, you can "enable" the view which will make the required changes so the view may be utilized in SalesLogix

SAGE CRM SALESLOGIX

✓ There is no way to create views inside SalesLogix; you must use Enterprise Manager or similar tool to create the view

Enhanced Controls

✓ Graphing/charting control with many options including a cone-type chart

✓ Image controls adds the ability to store a picture (several common formats including Windows Metafile, BMP, and JPEG) in a BLOB and display that picture without script

✓ Tab Control allows developer to set tab order without recreating

Forms & Views Enhancements

Main Views

✓ Main View programmatic interface enhanced including ability to set/control size of middle pane and tabs pane

✓ Need a way to "force" tabs to appear for a user (currently, user can turn off and Admin can change without SQL)

✓ Should be able to fully control the tabs shown and order in code or properties of main view

✓ For many new main views (like Returns, Defects, etc.), the detail view and insert view are identical so only one Form must be customized

Group Customizations

✓ Can create Ad Hoc Group for any Main View (currently limited to ACO)

✓ Can create Dynamic Group for any Main View

Support for "Legacy" Forms and Scripts

✓ All Legacy Forms, Scripts, etc. <u>will continue to operate</u> in v7.

✓ All Legacy Forms, Scripts, etc. will be replaced. There will be **<u>no</u>** "Legacy" plugins shipped with new databases.

✓ All SLAPI function calls have equivalent Provider calls or functionality

✓ Several hard-coded tab views will be rewritten as Active Forms and Vbscript (see Attachments, Associations, etc.)

Customizable Attachments

✓ All Attachments views are consistent. This means that ACO views will be Active Form, not hard-coded as today. Scripting for attachment logic is common include scripts.

✓ Allows drag-and-drop functionality

✓ Add a "category" field which is sortable

✓ Minor usability enhancements include:

   o Rename Last Modified to Last Updated (display Date and time)

   o Sort by Last Updated, most recent at the top

   o Size needs to display in KB instead of bytes. Example: 127KB

     o   Buttons and grids better optimize screen space

SalesLogix SQL Profiler

Provides a database independent profiling application (similar to Microsoft's SQL Profiler) to trace SQL and performance counters throughout the execution path of the provider. This provides several benefits to the developer:

✓ Troubleshooting tool to see data flow through SLX

     o   Users can choose to profile any of applications on their computer running the SLX Provider (Windows Client, Web Client, etc. -- even custom applications!)

     o   Helps partners, PSG, Tech Support and customers troubleshoot performance issues in their environments, which are all very different

✓ Profiling has almost no impact on performance, as it was designed to use shared memory buffers and memory mapped files, so is quite safe to use in production environments without restarting either servers or client applications

✓ Requires no overhead when disabled

✓ From VBscript, write directly to the SLX Profiler error log or message log - useful for troubleshooting or adding a "debug mode" to your customization

✓ Ability to add database optimization (basically change/optimize any query in SalesLogix)

✓

Installing and Using SLX Profiler

- ✓ Automatically installed with any SLX application that installs the client-side SLX Provider
- ✓ Can be run at anytime without changing Registry or restarting application
- ✓ Can be used in production environments where restarting a SalesLogix application is not an option
- ✓ Minimal impact on the server or database
- ✓ Tracks both Forward Only (client-side) and VSSC cursors

Starting SLX Profiler

- ✓ Run SLX Profiler (SLXProfiler.exe) from the SalesLogix program directory
- ✓ Select File|New from the menu to begin a new session
- ✓ From the Running Applications dialog, select the applications to capture SQL or check the box to select all applications
- ✓ Selecting all applications is often easiest because once an application is terminated, it must be reselected to resume
- ✓ **NOTE:** Applications must be running to appear in the list

Understanding SLX Profiler Results

- ✓ The datagrid will begin to show all SQL activity as a series of execution timings (in milliseconds) where each row contains
    - o Time stamp - starting from 0 of this entry
    - o Provider parse time - time taken for the provider to internally parse the query
    - o Provider prepare time - time taken for the provider to internally prepare the query, which shows variances when the provider has to update it's internal caches (like loading the schema information for the tables from the DB)
    - o Secure time – time taken for the provider to secure the query
    - o Execute time – time taken for the provider to execute the query against the DB server. This will show all the time taken for the DB server to actually execute the query, so long running queries will be highlighted here. This does not include data retrieval time from the server. This is especially evident when running queries on large tables, where ORDER BY is used on non-indexed columns, use of poor joins or bad query plans.
    - o Get Rows time – time taken to actually retrieve the data from the DB. This will show large numbers for large result sets.
    - o Log time – time taken to prepare and generate the QUE file.
    - o Rows – Number of rows retrieved for this query
    - o User ID – SalesLogix user code who executed this query
    - o Client SQL – query executed by the client. Therefore, this excludes all security joins and other additions. This is available, but currently not in the profiling output.

✓ A user can RMB on this output, copy it all to the clipboard and paste in Excel for further analysis.

✓ The SQL statements are captured and are color coded by type

- o Queries executed by a client of the SLX provider can be one of the following colors: SELECT – White, INSERT –Blue, UPDATE – Yellow, DELETE - Gray

- o Internal SLX Security queries (SYS_SECURITY) are in Teal

- o Other internal SLX queries are in Light Green:

  - ▪ SYS_SCHEMA - Data Dictionary queries, which run to obtain schema and database information

  - ▪ SYS_KEYGEN - key generator queries are run to query and update the DB

  - ▪ SYS_PROC – queries executed as a direct result of running an internal provider query

- o System VSSC execution (SYS_VSSC) are in Light Blue

✓ User can filter displayed SQL statements using regular expressions

✓ This is a 'non-destructive' filter so the information is captured but not displayed to make monitoring easier

✓ Learn more about using regular expressions in the help file

Helpful Tips

✓ **Clear display** - clear the grid by right clicking on the grid and selecting Clear from the pop-up menu

✓ **Reset timestamp** - reset the timestamp by right clicking on the grid and selecting Reset Timestamp. This will give a timestamp of 0.0000 to the next SQL statement that is captured.

✓ **Filters** – filters are an easy way to show only information that you need. You will need to reacquaint yourself with regular expressions, but not too taxing (for example, SQLTYPE = 'USER' to filter by SQL type).

✓ **Copy & Paste** - copy whatever is in the grid by right clicking on the grid and selecting Copy then Paste into Excel or a text editor in a tab separated format. In Excel, the columns will automatically be separated for you, including column headings.

✓ **Pause** - If you would like to 'pause' the capturing of the SQL statements, just click the Pause profiling button on the toolbar. When you want to resume, just click it again and it will start capturing SQL statements again.

✓ From VBscript, write directly to the SLX Profiler error log or message log - useful for troubleshooting or adding a "debug mode" to your customization Simple example:

- o Set dbg = CreateObject("SLXProfiling.DebugTrace")

- o If dbg.IsTraceEnabled Then

- o   dbg.LogMessage "This is a log message"

- o   dbg.LogMessage dbg.IsTraceEnabled

- o   dbg.LogError "This is a log error",2

o   End If

Query Optimization in SLX Profiler

✓ Very simply, you can replace any standard query in SalesLogix with a custom, optimized query

✓ You must first login to the Optimizer and click Enable to activate

✓ RMB any query in SLX Profile and choose to Optimize Query

✓ **Exact Match** will literally match the query so you optimize for that very specific query

✓ **Shared** will parameterize the query so you see a **:?** placeholder for any dynamic fields (such as a USERID in the FROM clause)

✓ You may add optimizations specific to either Oracle or SQL Server – this is useful for Oracle Host with MSDE remotes

✓
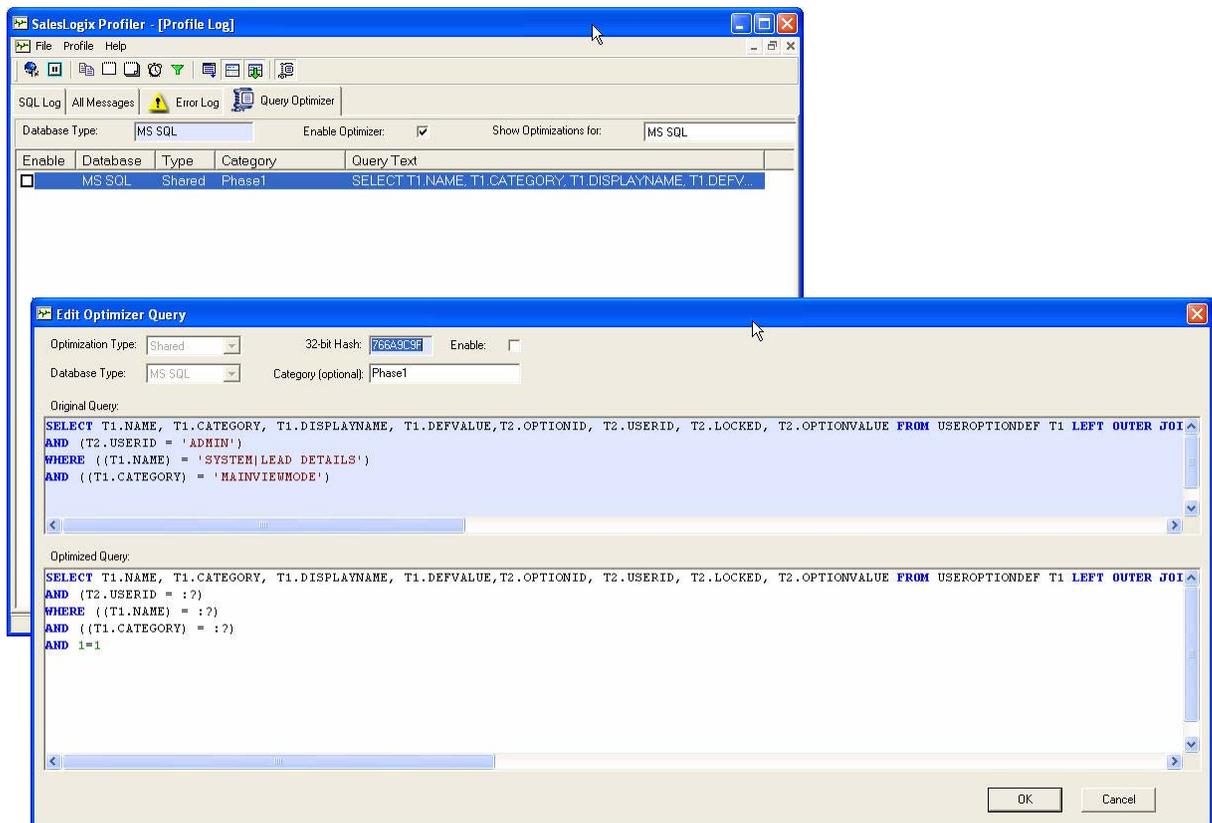
SalesLogix Security API

✓ Provide a secure no-registration COM API for allowing 3rd parties to extend or completely override the current row level security implementation in the SalesLogix OLE DB Provider.

✓ Current customers, BPs and our own PSG group have requested this feature on numerous occasions, so we are addressing a very real need.

✓ The API is based around a simple set of COM objects, which is broken into two pieces.

  o **Security Broker**

  The first object is the Security Broker, and is expected to provide 3 methods – Initialize, GetSecurityObject and UnInitialize. This is called when a user logs into the Provider (Initialize), and is passed user context information and underlying database connection information. Here the implementer can cache and do any initial setup.

  The GetSecurityObject method is called every time a query is executed and must be secured, and the implementer returns an instance of a Security object (explained below). If the implementer does not need to secure a particular query, they simply return nothing to the provider, and the provider will ignore extended security for this object.

  o **Security Component**

  The second object is the Security component, and requires only one method be implemented, namely Secure. This method is called to secure the query to be executed, and is passed a query context, allowing the implementer to examine the list of tables to determine how they wish to secure a given query.

✓ By no-registration COM, we mean that although the implementer is writing a COM component, they do not need to register this in the traditional sense on any client machine, as the provider invokes this object dynamically. The DLL is stored in the SLXSECURITYOBJ table, and is deployed like any other plug-in. It also syncs out to remotes.

✓ Extended security objects are identified in the SLXSECURITYOBJ table, and are executed in a sequence by the provider, based on the sequence defined in this table – which is user controlled.

✓ Individual security objects can be enabled and disabled by the administrator only. The SLXSECURITYOBJ table will not be visible to anyone but the ADMIN user in Saleslogix – the provider will hide this from view.

✓ A tool will be provided register or update security object (or potentially integrated into Admin / Architect). Only the Admin user can log-in to this tool. A CRC will be generated and stored in the SLXSECURITYOBJ table, so that the provider can verify the DLL on the client machine is the same as registered in the SLXSECURITYOBJ table, preventing a malicious user from installing their own security object to bypass security.

.NET Customizations

- ✓ Display and support .NET customizations (technically any .NET Framework managed assemblies) in SalesLogix as standard plugins in database

- ✓ SalesLogix v7 requires .NET 2.0 for all clients and Web Server

- ✓ Out-of-box features will not utilize or be rewritten for .NET

- ✓ Customizations may be developed in Visual Studio.NET with Visual Basic.NET, C#, C++

- ✓ .NET development is for experienced .NET developers and will not match the relative simplicity of SalesLogix Architect – use where appropriate but not a direct replacement for SalesLogix Architect or Active Forms/VBscript

.NET Overview

- ✓ .NET ("dot-net") is Microsoft's umbrella term for solutions, platforms, architectures, operating systems, applications, development tools, and web services transparently involving dependency upon NetFX, or the .NET Framework

  - o SalesLogix v7 is.NET-enabled by supporting customizations written in .NET languages as native plugins

- ✓ Microsoft .NET Framework (NetFX) is a multi-part software platform consisting of:

  - o Common Language Runtime (CLR), a runtime engine

    - ▪ Executes MSIL (Microsoft Intermediate Language) - A "pre-JIT-able", machine-neutral computer instruction language

    - ▪ Not bytecode (but similar); not a virtual machine

    - ▪ Supports many languages, unlimited third party language support

    - ▪ Managed memory / garbage collection

    - ▪ Compilations called "managed code" or "managed assemblies"

  - o Library of managed APIs including Windows and Web Forms,

  - o Compilers for Visual Basic.NET, C# ("C-sharp"), Managed C++, and other .NET development languages

  - o IIS extensions for executing ASP.NET

 - o Tools for managing and executing managed code

SalesLogix Customizations with .NET

- ✓ Managed assemblies can be executed in SalesLogix v6 using COM Callable Wrappers or by executing standalone EXEs

- ✓ However, versions of SalesLogix prior to v7 required managed assemblies to be distributed manually (user installation with .msi packages, etc)

✓ SalesLogix v7 introduces distribution model using database synchronization, now transparent to remote users

✓ COM object auto-distribution not supported in SalesLogix as it generally requires component registration ("RegSvr32.exe …")

       o Exception: OLE-DB Provider Extensions with predefined interfaces as specified

"Importing" .NET Assemblies Into SalesLogix

✓ SalesLogix .NET Forms Manager in Administrator imports managed assemblies (DLLs and EXEs) and referenced dependencies

✓ Can also import supporting material such as source code, documentation, and other development files

✓ SalesLogix .NET Forms Manager allows you to manage team/user releases

✓ SalesLogix .NET Forms Manager also allows you to fully license the assemblies (*documented information will be available in future releases*)
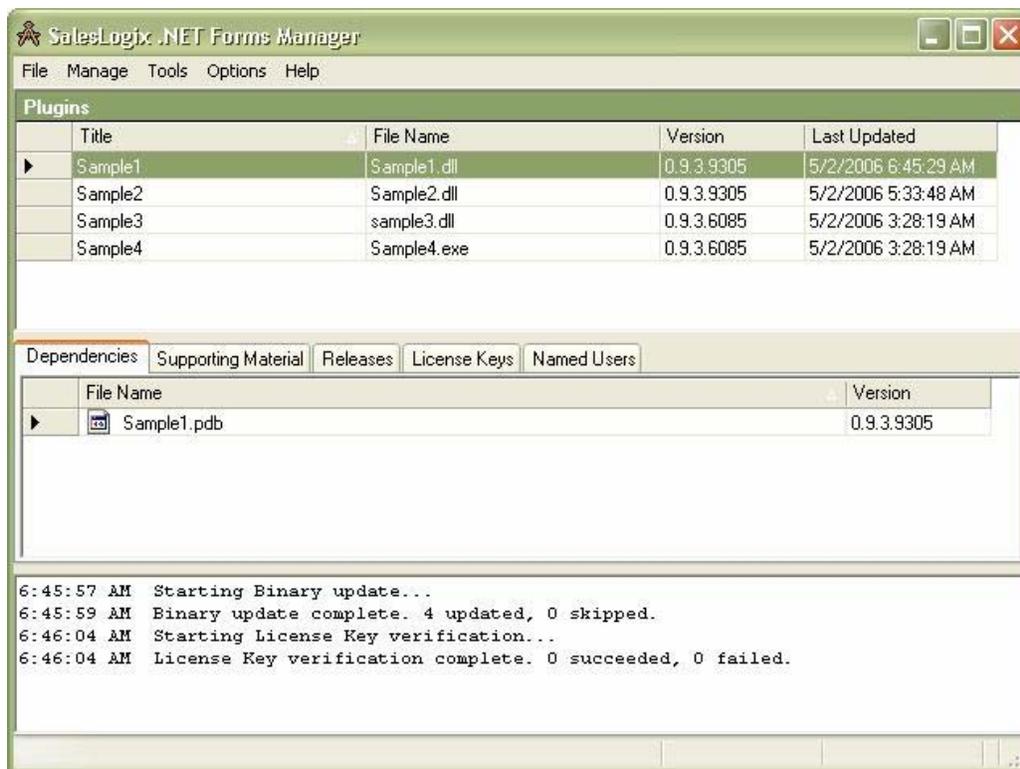
.NET Development Tips & Tricks

✓ Plugins are dynamically loaded at runtime using a Common Language Runtime feature called "reflection"

- ✓ Generally, loaded assemblies cannot be unloaded if they are loaded into the same AppDomain
- ✓ In SalesLogix, each plugin's memory space is isolated from SalesLogix by means of an isolated AppDomain
- ✓ Isolated AppDomains are the only way to unload an assembly
- ✓ All plugins (except OLE-DB Provider Extensions) are unloaded when Ctrl+F5 ("Refresh All") is invoked
- ✓ AppDomains do not affect garbage collection which is handled internally by the Common Language Runtime
- ✓ When to use managed assemblies:
    - o Avoid using managed assemblies for simple data-bound forms with basic business rules, SalesLogix Active Forms will generally be more efficient
    - o Use managed assemblies when business rules and UI logic exceeds the abilities of VBScript
    - o Use managed assemblies before VBScript class libraries (attached VBScript plug-ins) have become excessively complex
    - o Consider building complex object libraries with a .NET language rather than VBScript
    - o Use managed assemblies for GDI+ or other .NET Framework library features that are needed by the SalesLogix Windows Client
    - o Use managed assemblies when other solutions written in a .NET language need to be integrated with the Windows Client.

Frequently Asked Questions (FAQs)

Q: Will my upgrade from v6.2 to v7 be as complex as my upgrade from v5.2 to v6?

A: No, v7 is very similar in many technical areas to v6.2. Think of v7 as a "super service pack" to v6.2 in terms of complexity. In fact, v6.2 remotes can be converted and upgraded in the field without recutting in most cases. Many of the new features in v7 do not significantly impact v6.2 customizations but open many areas for new customization potential.

Q: Are Legacy forms and scripts supported in v7? Or will I need to re-create all older customizations.

A: Legacy Forms and Legacy Scripts are not used in new SalesLogix v7 implementations but are fully supported in v7. Legacy customizations will operate without change in most cases with v7.

Q: How is Microsoft SQL Server 2005 supported?

A: SQL 2005 is fully supported as the Host DB.

SalesLogix REQUIRES MSDE on Administrative Workstation to cut remotes – cannot cut on SQL Server 2005 Host because will not operate on MSDE Remotes. Why? SQL Server 2005

no longer supports DTS - compatibility mode is untested and requires an older SQL Server 2000 license.

Remotes <u>REQUIRE</u> MSDE. MSDE-cut Remotes operate on SQL Express 2005 databases but we will not qualify or install.

We do not require or install .NET 2.0 which is required for SQL Express 2005.

Q: Does this replace existing campaigns?

A: Yes. This version of Marketing will completely replace existing campaign functionality.

Q: Will this require re-cutting remotes to apply?

A: No. Marketing is intended to be applied as a bundle. Minor data conversion required will be done within the bundle as SQL scripts.

Q: Will all Lead and Campaign data be synchronized to all Remotes?

A: No. Lead and campaign data will be synchronized based on ownership of the records.

Q: How do I get more information on the EmPulse service for e-mail marketing?

A: Visit www.emailpulse.net for more details.

Q: Is EmPulse pricing on the Web site valid for SalesLogix customers?

A: No, SalesLogix customers will enjoy special discounts. Special SalesLogix pricing starts at $99/mo for 1,000 e-mails with additional e-mails starting at $35/1,000 e-mails.

Q: How does a customer sign up for EmPulse Service?

A: A link will be provided in SalesLogix to sign-up. The customer will become an EmPulse customer and receive bills and complete customer support from EmPulse. SalesLogix will fully support the integration, but any calls or training directly related to the service will be transferred to EmPulse.

Q: How do Business Partners get access to the EmPulse service and get training?

A: BPs will receive a limited-use, demonstration account with EmPulse at no charge (limit 25 e-mails per campaign). WebEx and online training will also be available upon release of the Marketing module.

Q: Will this Marketing be backwards compatible with existing campaign customizations?

A: In most cases, no. Marketing is being built as a new module to replace existing campaigns and add new features. However, existing campaign data will remain unchanged and be completely usable after the upgrade.

Q: Is Marketing compatible with third-party add-ons?

A: We will work with tech partners so they can update their products for compatibility with the new Marketing features. We do not anticipate this will be fully complete when initially released.

Q: Has the Lead Capture (web) functionality been modified to populate the new LEAD table or does it still populate the ACCOUNT/CONTACT table?

A: There is a new "generic" web form int he marketing Feature pack that will "submit" results to a text file that is then imported with the Import lead functionality. That way you don't need to open the firewall to directly connect to the database - especially if you host your web site remotely.

Q: When Leads are converted to Contacts, do the History/Activities records move over?

A: All Lead info moves to the Contact/Account records. There is not Activities directly associated to Leads.

Q: Is it possible to launch a "Phone Call" campaign, so that the system schedules phone call activities across a span of time for designated sales reps?

A: No, for Leads the idea is to work from a Group/list to call Leads and use the Qualification checklist to assist with the step. Usually time is very short and completing activities can be more burden than helpful.

Q: Do SalesLogix clients receive a limited "trial" EmPulse account for giving it a test-drive, or is this only for BPs?

A: Anyone can sign-up for a 30-day trial at www.emailpulse.net

Q: Do you know if EmPulse supports some type of "data merge" so that the contact's name can be inserted in a newsletter?

A: Sure, the fields are limited now but next service pack will expand to several custom fields. Empulse uses a ~email~ type tagging to identify the merge fields which you can find in the editor in Empulse.

Q: Any plans for enhancing the UI so that Sales People can easily label (read "attach") a lead or contact to a campaign (i.e. "add as target" functionality).

A: Not planned except through the Campaign section.

Q: Any plans for implementing an easier way to "Add Response" for a Lead or Contact to a campaign (e.g. button on main detail view instead of going to the "Marketing" tab and doing a right-click) – this keeps coming up by different clients which indicates it is a core issue and not a custom (one-off) requirement.

A: You can RMB on the Marketing tab for a Lead or Contact to add a response today.