



Cleary
Training
Associates



Customised IT Training & Development

Course Outline | SalesLogix Administrator

Duration: 1 Day

Objectives: Students will learn the basic skills necessary to begin using SalesLogix Administrator. They will manager users, calendars, remote users and the sales library.

Prerequisites: A understanding of using databases and a knowledge of SalesLogix Client is required, gained either by previous experience or by attendance on SalesLogix End User Course.

Components of SalesLogix

- SalesLogix Client
- Workgroup Administrator
- Architect

Administrator

- Understanding the Administrator
- Controlling the Administrator Workspace
- Managing Users
- Creating Sales Teams
- Security
- Managing Menus
- Calendar Control
- Realigning Territories and Activities
- Examining the Sales Library
- Administrative Roles

Synchronisation

- Understanding the Sync Process
- Configuring the Sync Server Profile
- Managing Sync Transfer Profiles
- Viewing Sync Report
- Setting Conflict Resolution
- Activating Sync

Manage Remote Users

- Managing Remote User Database
- Understanding Agents
- Sending Remote Tasks
- Subscription Rules

Table, Fields and Data

- Understanding Table Relationships
- Examining Database Manager

Bundles

- Understanding Bundles
- Creating a Bundle
- Using the Bundle Manager