SageCRM

SageCRM 6.1

Solo Guide

Contents

Chapter 1: Introduction

Chapter 2: Solo Server Installation

Chapter 3: Enabling Solo Clients

Chapter 4: Setting up your Filter Profile

Chapter 5: Installing Solo Client

Chapter 6: Synchronizing with the Solo Server

Chapter 7: Outlook Integration and Solo

Chapter 8: Solo Server Administration

Chapter 9: Upgrading Solo Client

Chapter 1
Introduction

This guide is for CRM Implementers.

Please note that while the document refers to Sage CRM, CRM, or the CRM system throughout, all functionality covered is also relevant to SageCRM, SageCRM for Sage Accpac and Softline Accpac CRM.

We assume that you have:

- Experience in implementing and supporting relational databases.
- Experience in implementing and troubleshooting CRM installations.

What is CRM Solo?

CRM Solo is the Sage CRM disconnected solution for distributed remote clients. SQLLite is the supported database on the Client—it is installed by default as part of the Solo Client installation. SQLLite can replicate with any database on the Solo Server, once it is supported by CRM.

Solo Client users work with a subset of the data that is available to them when they work online. Their Security Profile determines the type and quantity of data available to them. The users themselves determine exactly what records they work with offline by specifying their own filter criteria. The data is stored locally on the Client laptop and needs to be synchronized regularly with the Solo Server to maintain an up-to-date CRM database.

How does CRM Solo Work?

When the Solo Server is installed it makes an empty Snapshot of the database available for the Solo Client installation. Once the Solo Client application is installed, the empty Snapshot is created on their laptop for local use. On the first sync, the client data is synchronized, along with any schema or metadata changes that have occurred since the snapshot was created. Subsequent syncs simply involve the standard sync process and any necessary schema changes. In the standard synch process, the Client pulls down subsets of data (that is, the records which they specified in their Offline Filter Profile) to their laptop.

Note: It is recommended that Solo Clients limit the number of records they synchronize to 10,000 or less.

Solo Administration and CRM System Administration

If you are responsible for general CRM system administration, as well as Solo administration, you should already be up-to-speed on general CRM setup and administration tasks. For information on general CRM System Administration, please refer to the *System Administrator Guide*.

It is recommended that you complete system customizations and setup tasks before moving onto setting up users for offline use. This does not mean you cannot customize fields later on, but you'll reduce the learning curve of your users if they start working with a system that is not going to go through major changes in the first couple of weeks.

In addition, CRM Solo system administrators are responsible for a number of Solo-specific administration tasks in CRM, such as enabling users for Solo. Please refer to the chapter "Solo Server Administration" in this guide for more information.

Getting Started

The table in the next section gives a summary of each chapter.

To get your CRM Solo implementation up and running you need to:

1. Install the Solo Server. Refer to the "Solo Server Installation" chapter for more details.
2. Enable all users who you want to be able to work offline. Refer to the "Enabling Solo Users" chapter for instructions.
3. Instruct your users on how to set up their Offline Filter Profiles. Refer to the "Setting up your Offline Filter Profile" chapter for more details.
4. Install, or instruct your users on how to install, the Solo Client on each machine requiring offline access to CRM. Please refer to the "Installing Solo Clients" chapter for more details.
5. Instruct users on how to synchronize with the Solo Server. Refer to the "Synchronizing with the Solo Server" chapter for more information.

Chapter Summary

The table below gives a summary of each chapter.

Chapter	Summary
Solo Server Installation	How to install the Solo Server.
Enabling Solo Clients	Information for Administrators on how to enable users as Solo Clients.
Setting up your Filter Profile	Information for Clients on how to set up their Offline Filter Profile.
Installing Solo Client	Information for Clients and Administrators on how to install Solo Client. The System Administrator can do this, or individual users can do it.
Synchronizing with the Solo Server	Details for Clients on how to synchronize with the Solo Server.
Outlook Integration and Solo	How Clients can integrate and synchronize with Outlook.
Solo Server Administration	Solo-specific administration tasks that may need to be performed from time to time.
Upgrading Solo Client	How to upgrade Solo Client.

Chapter 2
Solo Server Installation

In this chapter you will learn about:

- Prerequisites for installing the Solo Server.
- Installing the Solo Server.
- Database configuration settings that affect Solo.
- Changing the HTTP port.
- Setting the Server time zone.

Prerequisites

To install Solo Server, you need:

- Windows 2000 Server / Windows 2003 Server.
- Any database supported by CRM—SQL, Oracle or Sybase. Please refer to the *System Administrator Guide* for details on required specifications.
- Microsoft Internet Information Service (IIS) 5 or 6.
- Two license keys—A CRM Solo Server key and a Client key.

Also note that:

- It is not possible to have more than one Solo Client installation on a client machine.
- You cannot have a Client and a Server installation on the same machine.
- It is recommended that clients have IIS installed on their machines. If ASP pages are to be run on client machines, clients must have Microsoft IIS installed on their machines. Please refer to the "Installing Solo Client" chapter for more details. For clients that cannot have IIS installed, i.e. XP Home, Sage CRM will install its own basic web server.
- Ensure that the Use IIS Auto Login field in Administration | Users | User Configuration is disabled (set to No) if you are using offline Solo Clients.
- Installation of the Solo Client is not supported on the Microsoft Vista operating system.

Installing Solo Server

The installation process for Solo Server is almost identical to the installation process for a typical Sage CRM installation. For instructions on installing CRM, please refer to the *System Administrator Guide*. All of the screens and dialog boxes that display during the Solo Server installation are the same as the ones that display during the CRM installation, except:

- An additional screen is displayed after the User Information dialog box that prompts you for your client license key. Simply enter the license key supplied to you by the vendor and continue with the installation.

Solo Configuration Settings

Once the CRM Solo Server is installed, you may need to check a number of Solo configuration settings.

To check Solo configuration settings:

1. Select Administration | Users | Solo, select the Configuration tab, and select the Change action button.
2. Make the changes you require and select the Save action button.

The table below explains the Solo configuration settings.

Field	Description
Solo Uses HTTPS	Set to Yes if Solo Clients are to synchronize over HTTPS, as opposed to over the company LAN.
Solo Uses Data Filtering	Selected by default. Uncheck this option if you don't want Solo to use data filtering. It is recommended that you leave this turned on.
Clients Must Have IIS	Set to Yes, forces clients to install IIS. Personal Web Server does not support the use of ASP pages. Therefore, if you want custom pages to run on clients, you must force the clients to install IIS. When clients run the Solo Client installation install, if they don't have IIS installed, they are prompted to install it.
Solo Publisher Identity Range	As each record (company, person, lead, etc) is created it is assigned a

Field	Description
	unique identity. The figure inserted in this field represents the size of the identity range assigned to the server. So, for example, if the range is 500, records 1 to 500 can be created on the server. The bigger the range, the less likely it is that an insert will involve the overhead of allocating a new range. If the range is exceeded, the server will re-calculate the next available range and continue to operate as normal. Refer to "Identity Range Errors" in the Solo Server Administration chapter for more details.
Solo Subscriber Identity Range	The size of the identity range assigned to the client. The bigger the range, the less likely it is that a client will run out of IDs when they are inserting records offline. It is recommended that the range should not be greater than 500. Instead, client users should be encouraged to synchronize frequently. To avoid reaching their range limit, users should be discouraged from performing tasks such as mass mailings offline. If the range is exceeded, the user must synchronize with the server before any more records can be added. Refer to "Identity Range Errors" in the Solo Server Administration chapter for more details.

HTTP Port

If your Web Server does not use the default port 80 or 443 for HTTPS, you need to change the port specified in CRM so that it is the same as the Web Server.

To change the HTTP port:

1. Select Administration | E-mail And Documents | Documents & Reports Configuration.

2. Select the Change action button and set the HTTP Port field to the same value as the port that the Web Server uses.

   When the Solo Client is installed, the port you specified is automatically used. However, if you change the HTTP Port field after the Client is installed, you need to change the setting manually in the Client registry.

Setting the Server Time Zone

The time zone setting on CRM must be exactly the same as that on the Solo Server.

To set the time zone on CRM:

1. Select Administration | System | System Behavior.
2. Ensure that the time zone selected in the Server Time Zone field is the same as on the Solo Server.

Now you can...

- Explain prerequisites for installing the Solo Server.
- Install Solo Server.
- Explain database configuration settings that affect Solo.
- Change the HTTP port.
- Set the Server time zone.

Chapter 3
Enabling Solo Clients

In this chapter you will learn about:

- Enabling users for offline access.

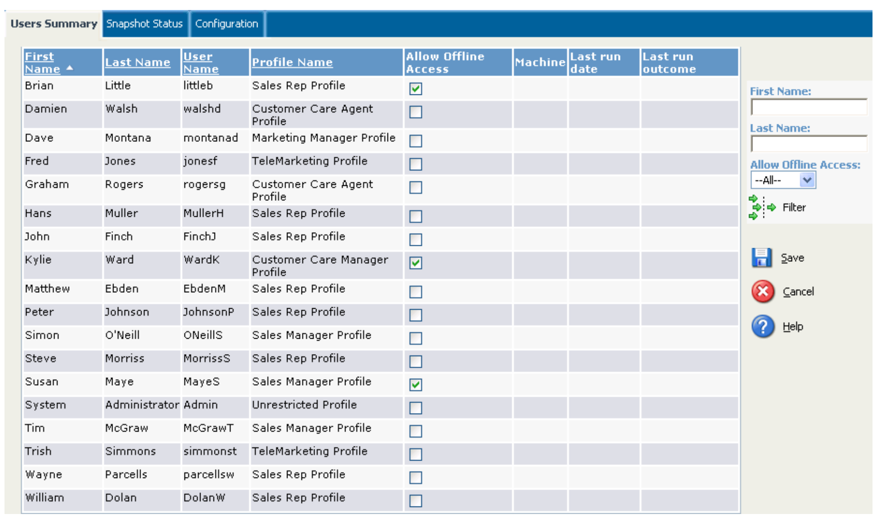
Enabling Users as Solo Clients

Once you have installed the Solo Server, the first thing you need to do is enable the users who want to work as Solo Clients.

To enable a user as a Solo Client:

1. Select Administration | Users | Solo.
2. Select the Users Summary tab.

   A list of all users in the system is displayed.
3. Select the Change action button.



First Name	Last Name	User Name	Profile Name	Allow Offline Access	Machine	Last run date	Last run outcome
Brian	Little	littleb	Sales Rep Profile	☑			
Damien	Walsh	walshd	Customer Care Agent Profile	☐			
Dave	Montana	montanad	Marketing Manager Profile	☐			
Fred	Jones	jonesf	TeleMarketing Profile	☐			
Graham	Rogers	rogersg	Customer Care Agent Profile	☐			
Hans	Muller	MullerH	Sales Rep Profile	☐			
John	Finch	FinchJ	Sales Rep Profile	☐			
Kylie	Ward	WardK	Customer Care Manager Profile	☑			
Matthew	Ebden	EbdenM	Sales Rep Profile	☐			
Peter	Johnson	JohnsonP	Sales Rep Profile	☐			
Simon	O'Neill	ONeillS	Sales Manager Profile	☐			
Steve	Morriss	MorrissS	Sales Rep Profile	☐			
Susan	Maye	MayeS	Sales Manager Profile	☑			
System	Administrator	Admin	Unrestricted Profile	☐			
Tim	McGraw	McGrawT	Sales Manager Profile	☐			
Trish	Simmons	simmonst	TeleMarketing Profile	☐			
Wayne	Parcells	parcellsw	Sales Rep Profile	☐			
William	Dolan	DolanW	Sales Rep Profile	☐			

User's Summary tab

4. Select the Allow Offline Access checkbox for each user you want to enable as a Solo Client. In this example, Brian Little, Kylie Ward, and Susan Maye are selected.
5. Select the Save action button.

All of the users you specified are enabled as Solo Clients. You will notice that the Allow Offline Access field in Administration | Users | Users is automatically set to Yes once you enable a user on the Users Summary Page.

Now you can...

- Enable users for offline access.

Chapter 4
Setting up your Filter Profile

In this chapter you will learn about:

- How to set up your filter profile.

Setting up your Filter Profile

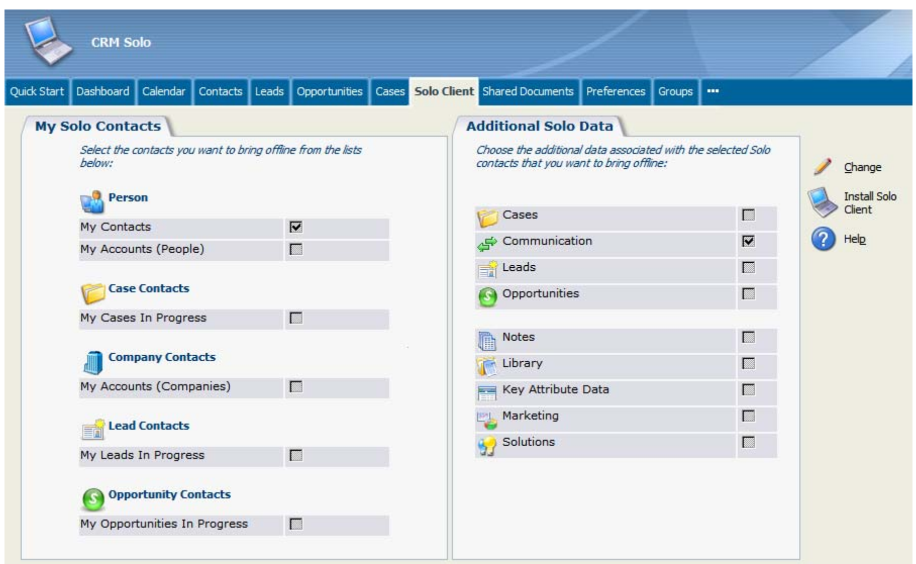
Before you install the Solo Client, you need to set up your Filter Profile. This means you specify which records you want to be made available to you offline on your laptop. You set up your Filter Profile on the Solo Client tab. This tab is available only to those users who have been enabled as Solo Clients. Please refer to "Enabling Users as Solo Clients" in the previous chapter for more details.

Note: You can make changes to your Filter Profile at any point, for example after you install the Client or after you synchronize.

To set up your Filter Profile:

1. Log onto the online CRM system, and select the Solo Client button.

   The Solo Client screen is displayed showing two panels My Solo Contacts and Additional Solo Data.



Solo Client screen

- **My Solo Contacts** panel contains various lists categorized within the entity with which they are associated. When you select any of the lists, you are indicating that you want to synchronize the People associated with the list.
  - **Person** represents all of the Person records in your Person lists. Your My Contacts list is included in this category by default, as is the My Accounts (People) predefined saved search list. Any Person saved searches you create yourself are listed too.
  - **Case Contacts** represents all of the Person records associated with your Case lists. The My Cases In Progress predefined saved search list is included in this category by default. Any Case saved searches you create yourself are listed too.
  - **Company Contacts** represents all of the Person records associated with your Company lists. The My Accounts (Companies) predefined saved search list is included in this category by default. Any Company saved searches you create yourself are listed too.
  - **Leads Contacts** represents all of the Person records associated with your Lead lists. The My Leads In Progress predefined saved search list is included in this category by default. Any Lead saved searches you create yourself are listed too.
  - **Opportunity Contacts** represents all of the Person records associated with your Opportunity lists. The My Opportunities In Progress predefined saved search list is included in this category by default. Any Opportunity saved searches you create yourself are listed too.

  When you opt to synchronize any list, the following records associated with the list are synchronized:

  - All Person records associated with the list.
  - The company information for the above People.
  - Addresses, e-mail addresses, and associated phone numbers for the above People and Companies.
- **Additional Solo Data** panel allows you to specify additional information you want synchronized for the people and companies you specified above. For example, selecting the:
  - **Cases** checkbox means that you synchronize all cases linked to the contact lists synchronized above, as well as the user's personal cases that are not linked to a person or company.
  - **Communication** checkbox means that you synchronize all communications linked to the people and companies you synchronized above. Note that personal appointments are synchronized too but only if

they are less than 60 days old. All tasks and appointments that belong to a company or person are synchronized—no time limit is imposed.

– **Leads** checkbox means that you synchronize all leads linked to the people and companies you synchronized above, as well as the user's personal leads that are not linked to a person or company.

– **Opportunities** checkbox means that you synchronize all opportunities linked to the people and companies you synchronized above, as well as the user's personal opportunities that are not linked to a person or company.

– **Notes** checkbox means that you synchronize all notes linked to the people and companies you synchronized above.

– **Library** checkbox means that you synchronize all Documents items linked to the people and companies you synchronized above, as well as all Documents items linked to the selections you made on the My Solo Contacts tab, for example Cases and Leads.

  Note that Shared Documents and Shared Templates in the Shared Documents library are always synchronized, regardless of whether the Library checkbox is selected.

– **Key Attribute Data** checkbox means that you synchronize all key attribute data linked to the people and companies you synchronized above.

– **Marketing** checkbox means that you will synchronize all marketing records linked to the companies and people that you are synchronizing.

– **Solutions** checkbox means that you can synchronize all solutions assigned to you.

2. Select the checkbox beside the lists that contain the records you want made available to you on your Solo Client.

3. Select the Save action button to save the criteria you specified.

   Your Offline Filter Profile is set up.

Now you can...

- Set up your filter profile.

Chapter 5
Installing Solo Client

In this chapter you will learn about:

- Prerequisites for installing Solo Client.
- How to install Solo Client.

Prerequisites

To install Solo Client, you need:

- One of the following client operating systems: Windows 2000, Windows 2003, or Windows XP Professional.

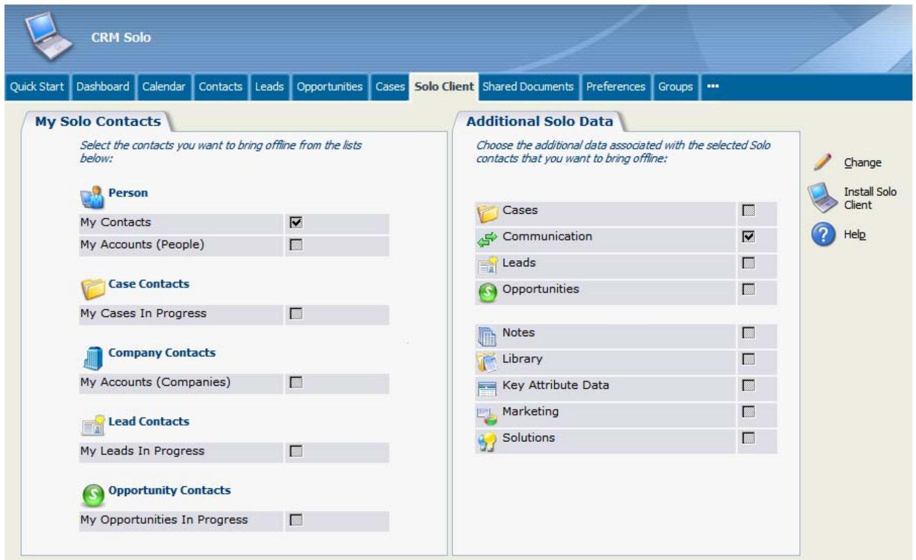
  Note: Windows XP Home is not supported.

- If ASP pages are to be used on the Client, Microsoft IIS 5 or 6 must be installed on the Client machine. Otherwise, Sage CRM's basic web server is installed by default during the client installation.
- To be an administrator of your own machine.
- The ability to log onto the Solo Server over the Internet.
- To be enabled as a Solo Client.
- Although the Solo Client machine does not need to be in the same time zone as the Solo Server, Clients in different time zones must ensure that they specify the correct time zone in their User Preferences.
- 256 MB of RAM is required.
- 40 MB of disk space required for the Client installation.
- 28 MB of disk space required after the Client has been installed.
- Ensure that Microsoft XML Parser 4.0 or above is installed on your machine. You can download it from http://www.microsoft.com

Installing Solo Client

To install Solo Client:

1. Log onto CRM and select the Solo Client tab.



Solo Client screen

2. Select the Install Solo Client action button on the right-hand side of the screen.

   A Security dialog box is displayed.

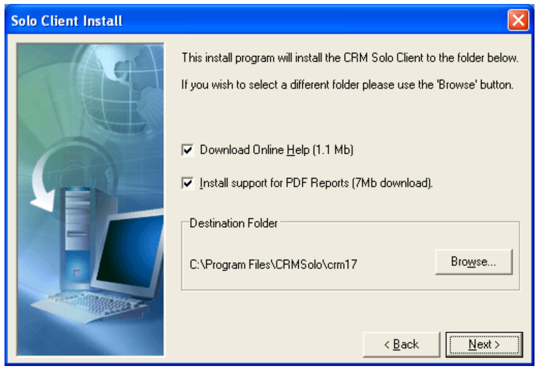
3. Select Install to install the Solo Client Install Plugin.

4. Select Yes to accept the licensing agreement.

   The Solo Client Install dialog box is displayed.

5. Online Help will be installed on the Solo Client by default. However, if you do not want to install Online Help, you can de-select the Download Online Help option on the Solo Client Install dialog box.

6. Select the location for the Solo Client program files using the Browse button and select Next, or keep the default location by simply selecting Next.



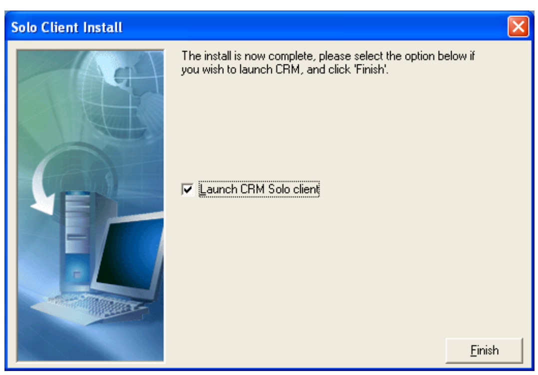
Solo Client Install dialog box

The files are copied onto your laptop.

To convert CRM reports to PDF format, CRM needs to install FOP conversion software developed by Apache Software Foundation (http://www.apache.org). If it is not already installed, the Install PDF Conversion Software dialog box is displayed. This allows you to install the software.

7. Select Yes Install This Software, and click Next. The FOP PDF conversion software also requires Java Runtime Engine (version 1.4 or greater). If you do not have this installed, you are prompted to install it at this point. Select OK to install the software, and follow the installation instructions.

8. Once the installation is complete, ensure that the Launch CRM Solo Client checkbox is selected, and click on the Finish button to launch the Solo Client Logon page.

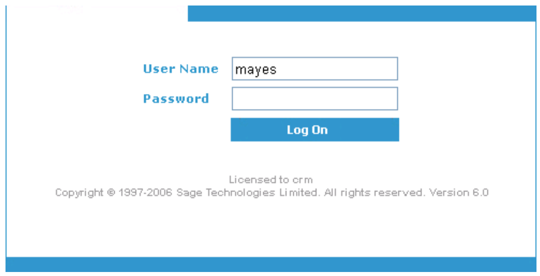


Solo Client Install complete

The URL for the Solo Client Logon page is in the following format:

http://<yourcomputer>/<CRMServerInstallationName>/eware.dll

Note: A link to the Client Logon page is also created as a shortcut on your desktop. If you forget to select the Launch CRM Solo Client checkbox, selecting this shortcut launches the Logon page too.



CRM Logon page

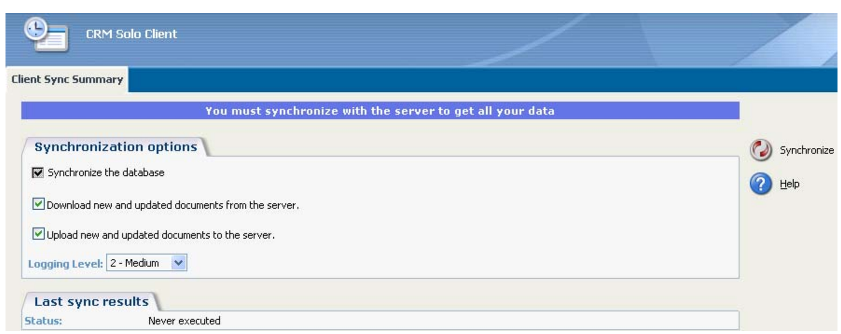
9. Type your user name in the User Name field and type your password in the Password field.

10. Select the Log On button.

    When you log on for the first time, a system initialization is carried out. **Note:** You are not synchronizing with the Solo Server at this point.

Log On Initialization

11. Once the initialization is complete, you are presented with the Solo Synch Summary screen, which informs you that you need to synchronize with the Solo Server before CRM records are available to you as part of the Solo Client installation.



Client Sync Summary screen

For information on Synchronizing with the CRM Server, please refer to the chapter "Synchronizing with the Solo Server" in this guide.

Now you can...

- List the prerequisites for installing Solo Client.
- Install Solo Client.

Chapter 6
Synchronizing with the Solo Server

In this chapter you will learn about:

- Synchronizing with the CRM server.
- Changing your password.

Solo Client Functionality

The same functionality available in standard Sage CRM is also available to users working with Solo Client. For more details on working with Sage CRM, please refer to the *User Guide*. Please note that the following features are not available offline: Marketing button, the ability to add or edit Reports, and Forecasting and Pipeline functionality.

The data accessed by Solo Clients is stored locally on their laptop and needs to be regularly synchronized with the Solo Server to maintain up-to-date information.

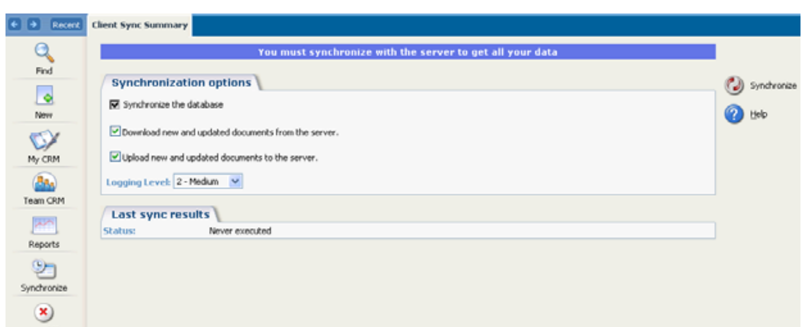
Synchronizing with the Solo Server

Now that you have set up your Offline Filter Profile and installed the Solo Client, you can synchronize with the Solo Server.

To synchronize with the Solo Server:

1. Log onto the Solo Client and select the Synchronize menu button.

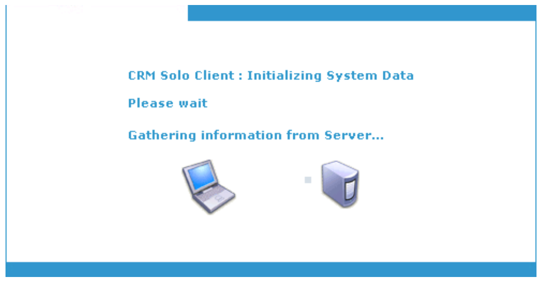
   The Client Sync Summary screen is displayed. If this is your first time to synchronise, a banner is displayed informing you that you need to synchronize with the server in order for records to be made available to you.



Client Sync Summary

2. Specify the Synchronization Options you want satisfied. Please refer to the table at the end of this section for an explanation of Synchronization Options.
3. Select the Synchronize action button.

   This Synchronization In Progress screen is displayed to inform you that the synchronization is in progress.

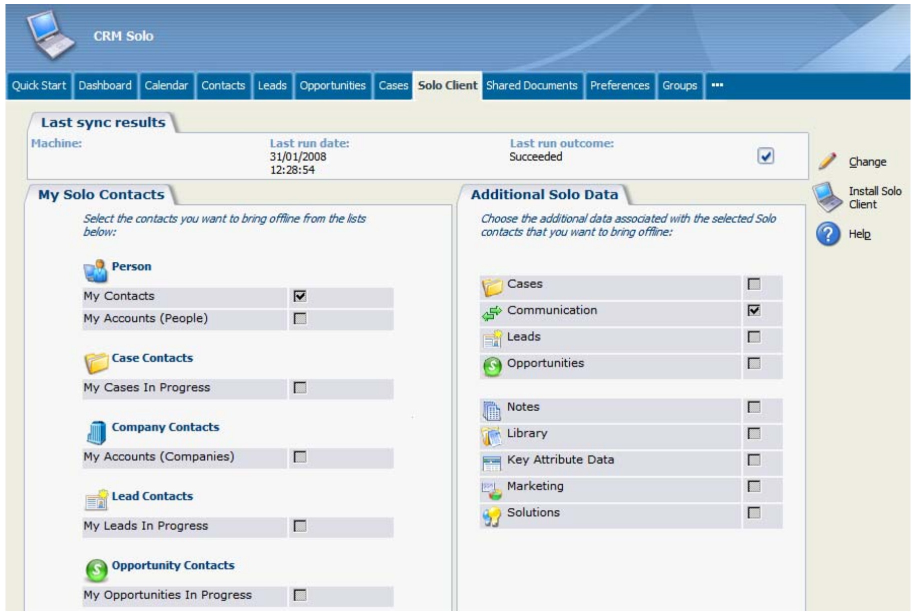


Synchronization In Progress Screen

Once the synchronization is complete, the Client Sync Summary screen is displayed.

Note: It is important that you wait until the sync is complete before attempting to work within any other CRM areas.

4. You are logged back into the system automatically once the synchronization is complete.
   - The records you specified in your Offline Filter Profile are now available on the Solo Client.
   - In addition, a new panel is displayed in your online system on the Solo Client tab. Information on your most recent sync is shown here.



Solo Sync Results

The table below explains the fields on the Client Sync Summary screen – Synchronization Options panel and Last Sync Results panel.

Field	Description
Synchronize The Database	Select this option if you want to synchronize CRM records.
Download New And Updated Documents From The Server	Select this option if you want documents that have been updated on the Server to be downloaded to the Client.
Upload New And Updated Documents To The Server	Select this option if you want documents that have been updated on the Client to be uploaded to the Server.
Logging Level	Select a logging level, from 0 to 3—when 0 is off and 3 is high.
Status	Shows the current synchronization status of the client.

Changing your Password

You cannot change your password when working offline. The Change Password checkbox is not available on the Logon page.

If your password is changed on the server while you are working offline, the new password will not take effect until the next time you synchronize.

Before the synchronization can begin, your password must be validated. If the validation fails (because the password has been changed on the server) you are prompted to enter the new password before the synchronization can continue.

The password will take effect from then on, and it must be used for normal logging on.

Now you can...

- Synchronize with the CRM server.
- Change your password.

Chapter 7
Outlook Integration and Solo

In this chapter you will learn about

- Integrating the Solo Client with Outlook.
- Synchronizing the Solo Client with Outlook.

Outlook Integration and Solo

You can integrate with MS Outlook from your Solo Client machine, and you can also synchronize contact information between Outlook and the Solo Client.

Downloading the Outlook Plugin

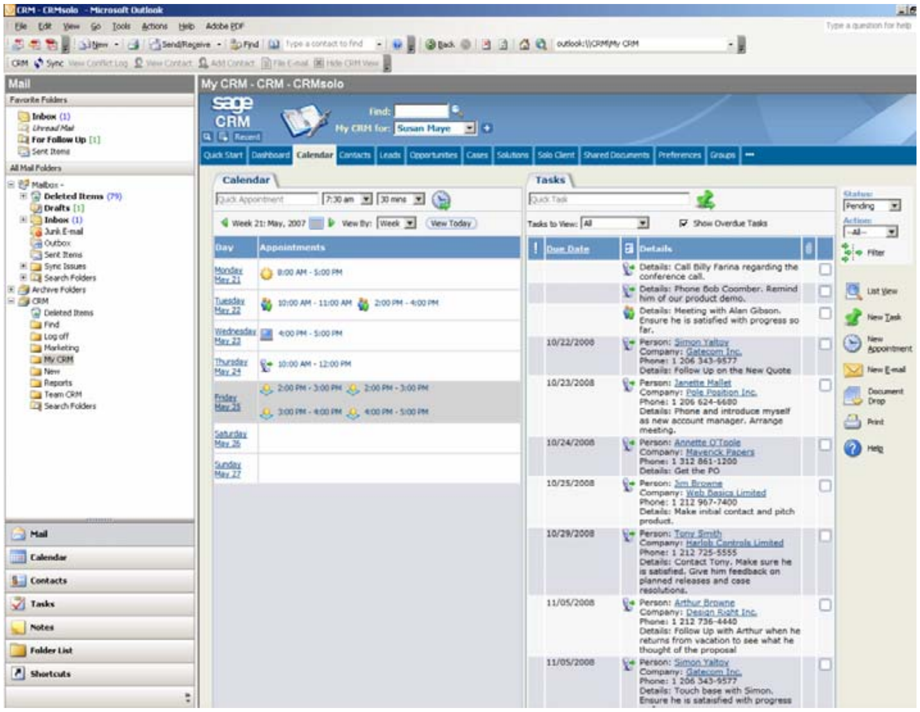
Before you can integrate or synchronize with MS Outlook, you need to install the Outlook Plugin from your Solo Client machine via My CRM | Preferences.

Note: If you already downloaded the MS Outlook Plugin while you were online, you *must* uninstall it and then reinstall it from within the Solo Client.

Please refer to the "Working with MS Outlook" chapter in the *User Guide* for detailed information on downloading the plugin.

Integrating with Outlook

You can work with the Solo Client from within Microsoft Outlook. All of the main menu buttons available when you work with the Client are available via Outlook, even the Synchronizing button.

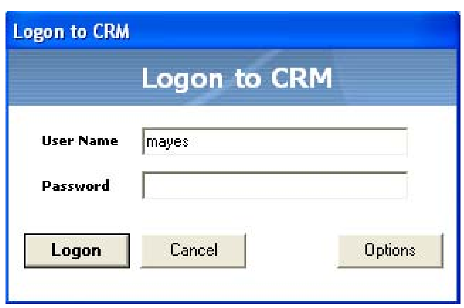


Using CRM within Outlook

To log onto the Solo Client from within Microsoft Outlook:

1. From the CRM Outlook folder list, click on, for example, the Find folder.

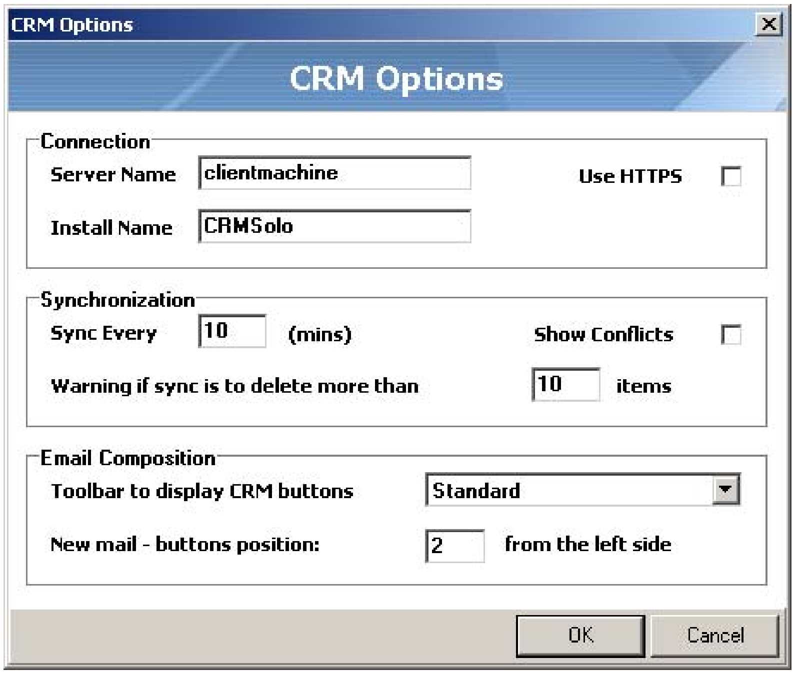
   You are prompted to log onto CRM.



CRM Log On

2. To verify that you are logging onto the Solo Client (and not the Server), select the Options button.

   The CRM Options dialog box is displayed



CRM Options

3. Ensure that your computer name is typed in the Server Name field.

4. Select the Use HTTPS checkbox if you want to synchronize over the Internet as opposed to your company LAN.

5. Select OK.

   You can now work with the Solo Client from within Outlook.

Synchronizing with Outlook

You can synchronize contact information between Outlook and the Solo Client in the same way as you would when you are connected to CRM online—except you are synchronizing Outlook with the Client as opposed to the Solo Server.

Note: Once you synchronize Outlook with the Solo Client, you must remember to synchronize the Solo Client with the CRM Server so that the contact information gets updated on the server, as well as on your Solo Client CRM installation.

Please refer to the "Working with MS Outlook" chapter in the *User Guide* for detailed information on synchronizing with Outlook.

Now you can...

- Integrate the Solo Client with Outlook.
- Synchronize the Solo Client with Outlook.

Chapter 8
Solo Server Administration

In this chapter you will learn about:

- The Users Summary tab.
- The Snapshot Status tab.
- Customizing tables for Solo.
- Creating new Views on the Solo server.
- Workflow SQL.
- Rebalancing territories.
- Troubleshooting tips.

Introduction to Solo Server Administration

As a Solo Server administrator, you may need to perform a number of Solo-specific administration tasks from time to time. Most Solo tasks are performed on the CRM Solo Server by selecting Administration | Users | Solo. This brings you to three tabs:

- Users Summary
- Snapshot Status
- Configuration

Users Summary Tab

Click on the Users Summary tab to view a list of users, and to review whether they are enabled for offline access or not, their Client machine name, the last run date, and the last run outcome.

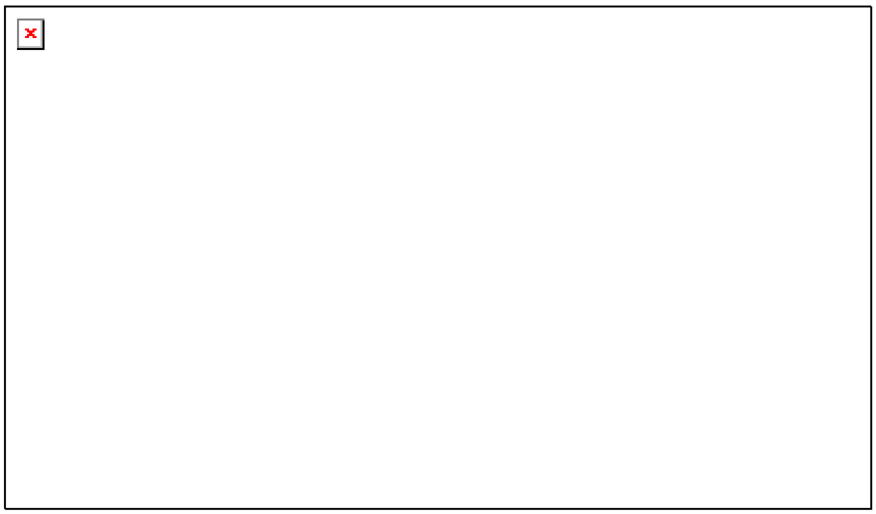
You can also enable and disable users from this page. Details on enabling users are provided in the chapter "Enabling Solo Clients" in this guide, details on disabling users are described below.

Disabling Users

It is important that you remember to notify Subscribers before disabling them. If they have not synchronized before they are disabled, they will lose local data on their machine that has not been integrated into the data network by Synchronization.

To disable a user:

1. Inform the users who you are about to disable that they should synchronize with the server.
2. Ensure that the Users Summary tab (in Administration | Users | Solo) is selected and select the Change action button.



Users Summary page

3. Unselect the checkbox in the Allow Offline Access column that corresponds with the user you want to disable.
4. Select Save.

   The user is disabled as a Solo Client.

Snapshot Status

The Snapshot Status tab displays details of the current snapshot, for example when it was created. The page also displays a Recreate Snapshot button. Although the button is available, it is unlikely that you will need to use it.

If you are making a large amount of customizations, adding new tables and so on, you can recreate the Snapshot for new Solo Clients who haven’t yet done an initial synchronization. These new Clients may find the initial synchronization quicker if the new Snapshot is available to them. However, it is not essential that the new snapshot is available. They can download the existing Snapshot file and get the same end result, albeit a little slower.

Recreating the snapshot file makes no difference to existing clients unless they reinstall the Solo Client application.

Configuration

Refer to "Solo Configuration Settings" in Chapter 1 of this guide for details on the fields on this tab.

Customizations

Any customizations you do on the server after users have been enabled are incrementally synched to the existing, enabled clients. For example, new fields, new tables, or any customizations carried out with the Advanced Customization Wizard. However, if customizations are done via the back end, as opposed to the CRM Solo Server, the changes cannot be synched. Therefore you must carry out all customizations from the CRM Server.

Note: If you add field level security to a field on the server, field level security is applied as expected to the client. However, if a change is made to the field level security after the initial snapshot has been downloaded by the client, the snapshot will need to be recreated and the client will need to sync with the server for the change to take effect.

Customizing Tables for Solo

You need to be aware of the Solo Options field on the Table Details screen when creating new tables (or making new table connections) and making decisions on whether or not you want make the tables available to Solo Clients.

To access the Solo Options field:

1. Open Administration | Advanced Customization | Tables and Databases.
2. Select the Create Table button.

   The Table Details screen is displayed.
3. Click on the Solo Options field to view the options.

   The Solo Options list contains the following options:

   – **No Data To Clients** - This means you want the table to be created on the Client, but no data will be synched. If the Client does manage to enter data into the table on the Client, the data will be sent back to the server but then deleted on the Client.

– **Filter by Company/Person** - This is only valid for tables that have a company and/or person id. Selecting the Filter by Company/Person option means that you will only get primary and secondary entity records for the companies and persons that you are synchronizing. Only primary tables with this option will appear on the My Offline CRM tab. Secondary entities cannot appear on the Solo filter screen.

– **No Table On Client** - This means you don't want the table to be created on Solo Clients.

– **Read Only on Client** - This is for tables that hold administration data. All the data in the table will be sent to the client. An offline user should not be able to edit this data. However, if they do edit it, the changes will never go back to the server.

– **CRM Internal** – This option should not be used as it is for use with system CRM tables only.

– **All Data to Client** - This means the data is not filtered, all the data in the table goes to the Client and any changes made on the Client are sent back to the server.

– **Filter by User** - This is only valid for tables that have a User ID. If you set this option, the Solo Client will get all records for this table for themselves only.

Creating New Views on the Solo Server

If *new* Views are being created or edited on the Solo server, an SQLLite version of the view also needs to be added or edited, as the syntax can vary slightly from MSSQL.

To enter the SQLLite version of a view:

1. Select Administration | Customization | <Entity> | Views.
2. Click on the Change action button
3. Type the SQLLite version of the view in the SQLLite field.
4. Select Save.

View Errors

If an SQLLite version is not added, CRM uses the text for the SQL view. Although this is often sufficient, it sometimes causes errors.

If a view is causing errors on the Solo Client, for example the "vMyNewView does not exist"' message is displayed, an SQLLite version of the view is probably necessary.

To create an SQLLite version of a view:

Copy the View Script text into the SQLLite field, and identify the use of the following text that may be causing problems in SQLLite.

1. **`TOP n`**. This command does not exist in SQLLite. The syntax **`LIMIT n`** should be used instead at the end of the view text.

   For example,

   ```
   CREATE VIEW vMyCompanies as SELECT TOP 100 * FROM Company WHERE
   Comp_PrimaryUserId = 28
   ```
   Should be replaced with

   ```
   CREATE VIEW vMyCompanies as SELECT  * FROM Company WHERE
   Comp_PrimaryUserId = 28 LIMIT 100
   ```
2. **`LIKE N'abc', = N'abc'`**. The N is not valid in SQLLite, you need to remove it.

   For example,

   ```
   WHERE Comm_Type = N'Task'
   ```
   Should be replaced with

   ```
   WHERE LOWER(Comm_Type) = 'task'
   ```
   Note: Refer to point six on Case Sensitivity.

3. **`ISNULL`**. This function is not valid in SQLLite, it needs to be replaced with the **`COALESCE`** function.

   For example,

   ```
   EG ISNULL(Pers_FirstName, '')
   ```
   Should be replaced with

   ```
   COALESCE(Pers_FirstName, '')
   ```
4. **`+`**. The plus sign as a string concatenator should be replaced with the sign ||

   For example,

   ```
   Pers_FirstName + ' ' + Pers_LastName AS Pers_FullName
   ```
   Should be replaced with

   ```
   Pers_FirstName || ' ' || Pers_LastName AS Pers_FullName
   ```
5. **`RTRIM, LTRIM`**. These are not valid in SQLLite. Remove them. There is no equivalent function to replace them with.

6. Case Sensitivity.

   SQLLite is case sensitive. Any string comparisons used in joins or to reduce the rows in the view should use the **`LOWER`** function to ensure that all matches are found.

For example,

```
WHERE Comm_Type = 'Task'
```

Should be replaced with

```
WHERE LOWER(Comm_Type) = 'task'
```

Workflow SQL

SQL used in Workflow rules must be SQL-92 compliant.

Note that SQLITE is SQL-92 compliant. Technical exceptions are available at http://www.sqlite.org/omitted.html

Rebalancing Territories

There are a number of steps that need to be undertaken by a System Administrator when rebalancing territories for Solo users.

When rebalancing territories for Solo users, you need to:

1. Inform all clients that a rebalance is about to take place and ensure that they synchronize with the Solo Server.
2. Disable all Solo Clients. Refer to "Disabling Users" in this chapter for more information.
3. Ensure that no other users are logged onto CRM.
4. Perform the rebalance. Refer to the Security chapter of the *System Administrator Guide* for more information.
5. Recreate the Solo Snapshot.
6. Re-enable all Solo Client users. Refer to "Enabling Users as Solo Clients" in the Enabling Solo Clients chapter for more information.
7. When Solo Client users log back on to CRM and try to synchronize with the Solo Server they will receive an error message advising them that they must re-install their Solo Client. Refer to the "Installing Solo Client" chapter for more information.

Troubleshooting Tips

Time Zone Error

If the Client gets a Time Zone error during synchronization, you may need to synchronize the Solo Client clock with the Solo Server clock.

To do this:

1. Go to the Command Prompt (Start | Run | **cmd**).
2. Type **net time \\<servername>**

   The current Solo Server time is returned.
3. Set the Client system time to this time.

   The clocks are synchronized.

Identity Range Error

The following message will appear when you exceed your Solo Subscriber Identity Range while working on the Solo Client:

Identity Range error message

You must synchronize with the Solo Server to continue. To avoid exceeding the subscriber identity range you should synchronize frequently and only perform tasks such as mass mailing while online.

You can increase the Solo Subscriber Identity Range on the Solo Configuration tab. Refer to the "Solo Server Installation" chapter for further details.

Error Log Files

If you are experiencing difficulties when synchronizing with the Solo Server you can send an error log file to CRM support.

To generate a log file:

1. On the Solo Client, select the Synchronize menu button.

   The Client Sync Summary page is displayed.
2. Select 3-Maximum on the Logging Level drop-down list.

3. Click on the Synchronize button.

   When the synchronization has finished or failed a log file will be created in C:\Program Files\CRMSolo\<installname>\Logs. From here, you can attach the log file to an e-mail and send it to CRM support.

Now you can...

- Discuss the Users Summary tab.
- Discuss the Snapshot Summary tab.
- Customize tables for Solo.
- Create new views on the Solo server.
- Explain Workflow SQL.
- Rebalance territories.
- Explain troubleshooting tips.

Chapter 9
Upgrading Solo Client

In this chapter you will learn about:

- Options for upgrading the Solo Client.
- Upgrading Solo Client using each option.
- Uninstalling the Solo Client.
- Removing the Sage CRM Solo Client Install plugin from the client machine.

Options for Upgrading Solo Client

There are two options available for upgrading the Solo Client:

- **Option 1** is designed to streamline the upgrade process for organizations with large numbers of Solo users. For example, if you have a large number of Solo users it can sometimes be difficult to arrange for all of them to synchronize before performing an upgrade. Also, if after the server upgrade, you find that some users have not synchronized, it will be necessary for them to use option 1 to upgrade their client if they are to avoid losing their unsynchronized data.

  Note: Upgrading with Option 1 will take longer than a normal synchronization. This is because all metadata changes that have been added to the server as part of the upgrade will need to be synchronized. You will also need to reboot your machine to complete the Option 1 upgrade procedure.

- **Option 2** is more suited to upgrades involving small numbers of Solo users. This is an efficient method when used in circumstances where you can ensure that all users will strictly adhere to the required steps.

Solo Client Upgrade – Option 1

To upgrade Solo Client using Option 1:

1. Upgrade the Solo Server. Refer to "Installing CRM when a Version is Already Installed" in the Installation chapter of the *System Administrator Guide* for more information.

2. Log on to the Solo Client and synchronize. Refer to the "Synchronizing with the Solo Server" chapter for more details.

   This synchronization will install the new 6.1 .dll.

3. When the synchronization has completed, reboot your machine.

4. Log on to the Solo Client.

   An automatic synchronization is performed to update the client metadata.

Solo Client Upgrade – Option 2

There are a number of steps that need to be undertaken when using option 2 to upgrade the Solo Client to version 6.1 from version 6.0. It is important that you follow these steps in the order set out below.

When upgrading Solo, you need to:

1. Ensure that each Solo Client machine has synchronized their 6.0 data before beginning an upgrade. This will ensure that in the event of a breakdown in the upgrade process, the latest data from the client will have been uploaded to the server. It is also recommended that the server be backed up after the latest client synchronization but before beginning the upgrade. Refer to the "Synchronizing with the Solo Server" chapter for more information.

2. Upgrade the Solo Server. Refer to "Installing CRM when a Version is Already Installed" in the Installation chapter of the *System Administrator Guide* for more information.

3. Uninstall the 6.0 Solo Client program from the client machine. Refer to the section "Uninstalling the Solo Client" in this chapter for instructions.

4. Ensure that the Sage CRM Solo Client Install plugin has been deleted from each Solo Client machine. The Sage CRM Solo Client Install plugin is the program that installs the Solo Client on the client machine. Refer to "Removing the Sage CRM Solo Client Install Plugin from the Client Machine" in this chapter for instructions.

5. Log on to CRM and re-install the Solo Client on each client machine. Refer to the "Installing Solo Client" chapter for more details.

Uninstalling the Solo Client

To uninstall the Solo Client:

1. Log out of CRM on the client machine.

2. Select Start | Programs | CRMSolo | Uninstall <CRMInstallName>.

3. Click Yes to continue.

4. Once the CRM Solo Client has been successfully removed, click Finish.

Removing the Sage CRM Solo Install Plugin from the Client Machine

To remove the Sage CRM Solo Client Install plugin:

1. On the client machine, open a Command Prompt.
2. In the Command Prompt, browse to C:\WINDOWS\Downloaded Program Files.
3. Type **del off*** and select the Return key.

   The 6.0 Sage CRM Solo Client Install should now be deleted.

4. To ensure that the plugin has been deleted, open Internet Explorer and select Tools | Internet Options.
5. In the Internet Options dialog box, click on the Settings button in the Temporary Internet Files area.
6. In the Settings dialog box, click on the View Objects button.

   The Downloaded Program Files folder is displayed. The Sage CRM Solo Client Install plugin should have been removed from here. If this is still present, select the plugin file and press the Delete key.

Now you can...

- Identify options for upgrading the Solo Client.
- Upgrade Solo Client using each option.
- Uninstall the Solo Client.
- Remove the Sage CRM Solo Client Install plugin from the client machine.

CRM Document Version Code: IMP-SOG-ENG-610-1.0/INTBETA