Sage CRM

7.0 Solo Guide

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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, regional products may use different brand names.

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. SQLite is the supported database on the Client—it is installed by default as part of the Solo Client installation. SQLite can replicate with any database on the Solo Server, once it is supported by CRM.

Solo Client users work offline with a subset of the data that is available to them when they work online. The System Administrator can determine exactly what records users work with by creating a Centralized Solo Profile with filter criteria specific to various job roles. The offline 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 sync process, the Client pulls down subsets of data (that is, the records that are specified in their Centralized Solo 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 setting up centralized solo profiles and enabling users for Solo.

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. Set up Centralized Solo Profiles. Refer to the "Setting up Centralized Solo Profiles" 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.
Solo Profiles	Information on how to set up Centralized Solo Profiles.
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.
- Creating the Solo snapshot.

Prerequisites

To install Solo Server, you need:

- Windows 2003 R2 Server / Windows 2008 Server.
- Either database supported by CRM—SQL or Oracle. Please refer to the *System Administrator Guide* for details on required specifications.
- Microsoft Internet Information Service (IIS) 6 or IIS 7.
- 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.
- 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.
- If you upgrade a Solo Server install to version 7.0, old 6.2 SP1 Snapshots will be removed. For more information about this, please refer to the *Upgrading Solo Client* chapter in this guide.
- Solo users must be set up as Named users in mixed license installs. For more information, please refer to the *Enabling Users as Solo Clients* section in *Chapter 3: Enabling Solo Clients* and the *Viewing Solo Licensing Information* section in *Chapter 8: Solo Server Administration*.

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.
Solo Publisher Identity Range	As each record (company, person, lead, etc) is created it is assigned a 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

Field	Description
	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.

   Note: If you make any changes to the time zone settings on the server or in CRM, you must restart IIS.

Solo Snapshot

Before you can instruct users to install the Solo client, you must create the Solo snapshot.

To create the Solo snapshot:

1. Select Administration | Users | Solo and click the Snapshot Status tab.
2. Click the Create Snapshot button.

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.
- Create the Solo Snapshot.

Chapter 3
Enabling Solo Clients

In this chapter you will learn about:

- Enabling users for offline access.
- Disabling users for offline access.

Enabling Users as Solo Clients

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

Note: To enable users for Solo in a mixed license install, their license type must first be set to Named. The error “License Type field must be set to Named User if Allow Offline Access is selected“ displays if you try and enable a solo user that isn’t named. For more information on how to change a user’s license type, please refer to the *User Panel Fields* section of the *System Administrator Guide*.

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.

Users Summary tab

4. Select the Allow Offline Access check box for each user you want to enable as a Solo Client. When a user is enabled for offline access, a drop-down appears in the Centralized Solo Profile column.

   The default Centralized Solo Profile is user defined. Solo clients with user defined profiles will be able to determine what information they pull down from the server themselves by navigating to the Solo client tab in My CRM and selecting data from the options available on the My Solo contacts and Additional Solo Data panels. For more information on the options available in these panels, please refer to "Chapter 4: Solo Profiles" in this document.

   If you want to limit the amount of information Solo client users can pull down from the server, you must create a Centralized Solo Profile. For more information on creating a Centralized Solo Profile, please refer to "Chapter 4: Solo Profiles" in this document.

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.

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. Deselect the check box 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.

Now you can...

- Enable users for offline access.
- Disable users for offline access.

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Chapter 4
Solo Profiles

In this chapter, you will learn about:

- Setting up Centralized Solo Profiles for your users.
- How to modify Centralized Solo Profiles.
- How to delete Centralized Solo Profiles.

Setting up a Centralized Solo Profile

System Administrators can define centralized profiles for Solo users, which tailor the information those users pull down from the server to the type of role they perform. For example, you can assign members of your sales team to a centralized Sales Team profile, which pulls down data specific only to Sales, such as My Contacts, My People, My Companies, My Opportunities, Communications and Notes.

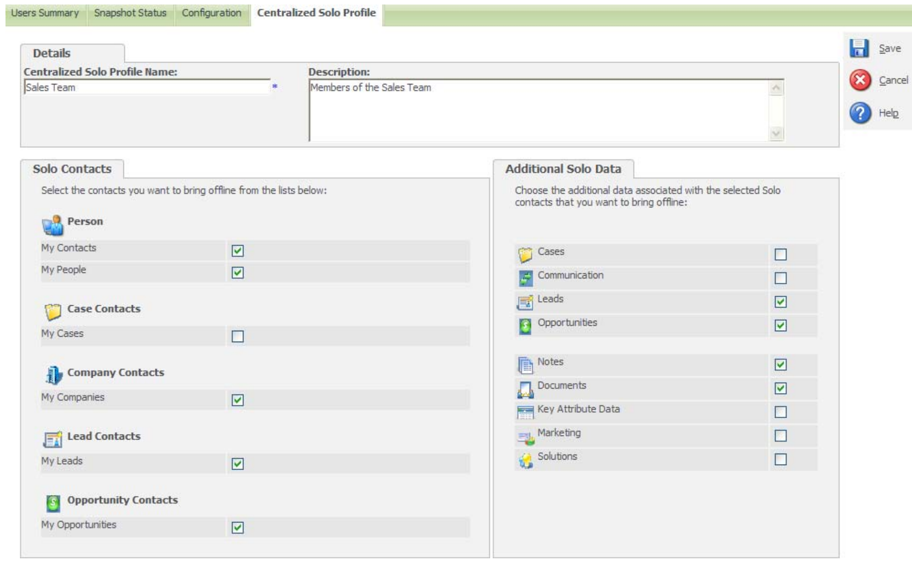
Before you instruct users to install the Solo Client, you need to set up a Centralized Solo Profile for them and assign them to it. This means you control which records you want to be made available to them offline on their laptop.

You set up Centralized Solo Profiles on the Centralized Solo Profile tab in Administration | Users | Solo.

To set up a Centralized Solo Profile:

1. Select Administration | Users | Solo | Centralized Solo Profile and click the New action button.

   The Centralized Solo Profile Details page is displayed.



Centralized Solo Profile Details page

After you have entered a profile name and description, you can select which data you want users with this particular profile to have offline access to. You can chose data from the Solo Contacts and Additional Solo Data panels.

- **Solo Contacts** panel contains various lists categorized within the entity with which they are associated. When any of the lists is selected in your Centralized Solo Profile, it means that your System Administrator wants you to synchronize the People associated with the list.
  - **Person** represents all of the Person records in your Person lists. The My Contacts list is included in this category by default, as is the My People predefined saved search list. Any Person saved searches that are available to all users 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 that are available to all users are listed too.
  - **Company Contacts** represents all of the Person records associated with your Company lists. The My Companies predefined saved search list is included in this category by default. Any Company saved searches that are available to all users 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 that are available to all users 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 that are available to all users 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.
- The People information for the above Company.
- 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** check box 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** check box 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** check box 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** check box 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** check box means that you synchronize all notes linked to the people and companies you synchronized above.
  - **Library** check box 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 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 check box is selected.

- **Key Attribute Data** check box means that you synchronize all key attribute data linked to all entities, including the people and companies you synchronized above.
- **Marketing** check box means that you will synchronize all marketing records linked to the companies and people that you are synchronizing.
- **Solutions** check box means that you can synchronize all solutions.

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

   In the example above, the System Administrator has created a Sales Team profile, and has allowed members of that profile to access Contacts, People, Companies, Lead Contacts, and Opportunities data, as well as Notes and Documents.

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

   The Centralized Solo Profile is set up.

Modifying a Centralized Solo Profile

You may need to change the type of Solo records that you want users assigned to centralized Solo profiles to bring offline. For example, you may have elected not to include Marketing data in the Sales Team profile, but the Sales Team has requested offline access to those records.

It is possible to modify a Centralized Solo Profile only if

a) There are only disabled Solo users associated with it.

b) There are no Solo users associated with it.

c) There are enabled Solo users associated with it, but they have never synchronized the profile.

To modify a Centralized Solo Profile:

1. Select Administration | Users | Solo | Centralized Solo Profile.
2. Click the hyperlink of the profile you want to modify on the Centralized Solo Profile page.
3. Click the Change action button on the Centralized Solo Profiles Details page.

   You can modify the name of the centralized solo profile, and the description.

   Note: If you do change the profile's name, all Solo-enabled users assigned to the old profile name will be automatically inherited by the new profile. All centralized solo profiles must have unique names. If you attempt to modify the name of a centralized solo profile with the name of an existing profile, a validation message will appear.

Select any additional records you may want users to be able to bring offline, or deselect any that you no longer want them to have offline access to.

4. Click the Save action button.

Users Summary tab

A check box appearing in the Saved Status column indicates that the Centralized Solo Profile has been successfully modified.

Deleting a Centralized Solo Profile

If there are no longer any active users assigned to a centralized Solo profile, or if the solo users assigned to the profile have never synchronized it, you may want to delete it.

To delete a Centralized Solo Profile:

1. Select Administration | Users | Solo | Centralized Solo Profile.
2. Click the hyperlink of the profile you want to delete on the Centralized Solo Profile page.
3. Click the Delete action button on the Centralized Solo Profiles Details page.
4. Click the Confirm Delete button.

   The Centralized Solo Profile is deleted.

Now you can...

- Set up a Centralized Solo filter profile.
- Modify a Centralized Solo filter profile.
- Delete a Centralized Solo 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 XP Professional, Windows Vista, or Windows 7.

  Note: Solo is not supported on Windows XP Home or Windows Vista Home editions.

- Microsoft IIS must be installed on the Client machine. If IIS is not present, the client install will not go ahead.
- 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. If the Client gets a Time Zone error during synchronization, users may need to synchronize the Solo Client clock with the Solo Server clock.

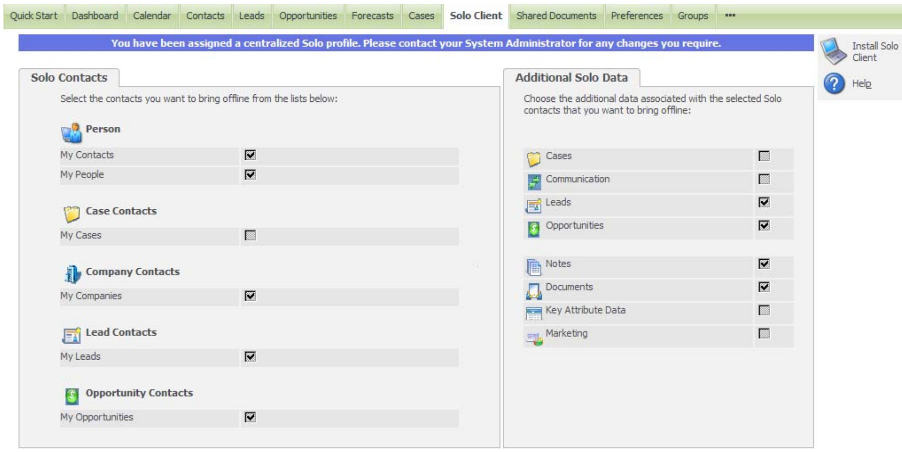
  Note: If you make any changes to the time zone settings on the server or on CRM, you must restart IIS.

- 1GB of RAM is required.
- 65 MB of disk space is required for the Client installation.
- The disk space required for the Client's filtered data will vary depending on their offline profile.
- 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

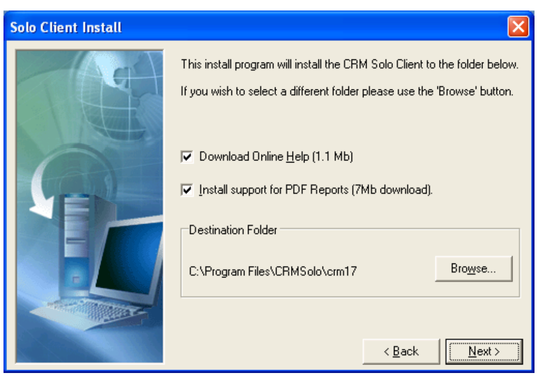
2. Select the Install Solo Client action button on the right-hand side of the screen.

   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 deselect 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.

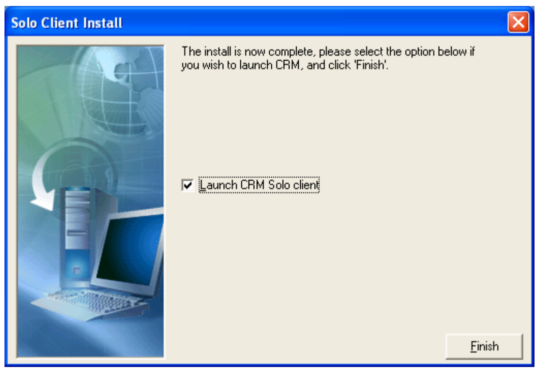


Solo Client Install dialog box

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 check box 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 check box, selecting this shortcut launches the Logon page too.

CRM Logon page

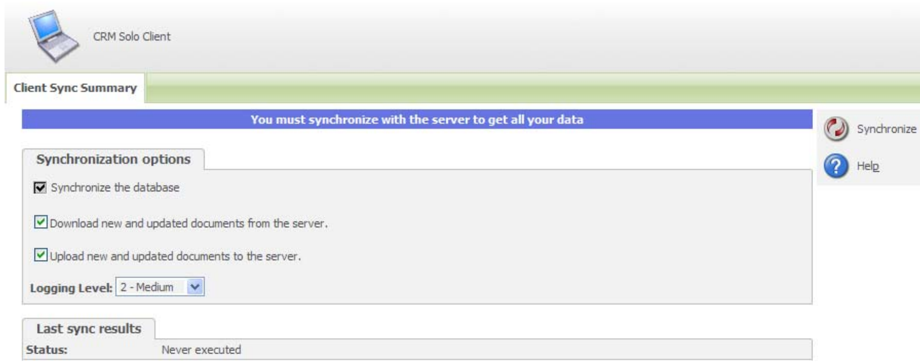
9. Type your user name in the User Name field and type your password in the Password field.

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*. 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.

Offline Limitations

Some CRM features are not available offline, and others have limited functionality.

Feature	Offline limitation
Forecasting	The Forecasting tab is available in the My CRM tab group but cannot be viewed.
Welcome	The Welcome tab is not available in the My CRM tab group.
CTI	The CTI icon and phone links are not available on the client.
Outbound Calls	The Outbound Calls tab is available offline, but its contents are not.
Groups – Static Groups	Static groups cannot be created offline. They can be viewed but not expanded offline.

Feature	Offline limitation
Dashboards	Classic Dashboards cannot be created or edited offline. Interactive Dashboards are not available offline.
Marketing	The Marketing button is not available offline. However, all relevant information is synced so it is still possible, for example, to associate a communication with a wave activity offline.
Pipeline	Not available offline.
Relationships tab	Not available offline.
Key Attributes tab	Not available offline.
Self Service tab	Not available offline.
Administration area	Not available offline.
Reports Category/Reports creation/editing	Not available offline.
Crystal Reports	Crystal reports do not sync across from the server. This is because they contain a reference to the database they execute against and connection to this server will not be possible offline.

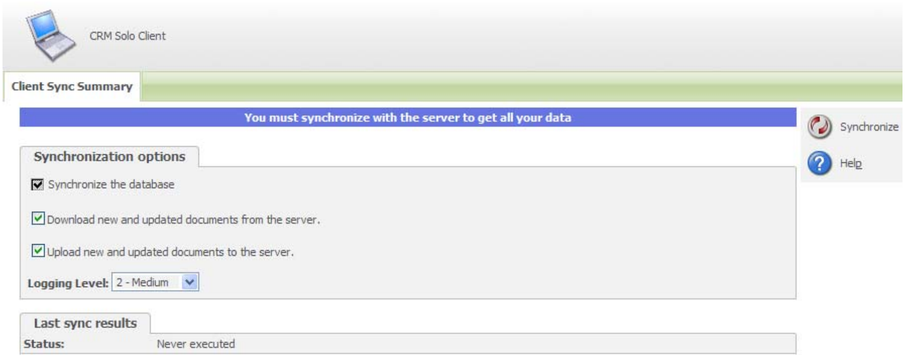
Synchronizing with the Solo Server

Now that you have been set up with a Centralized Solo 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 synchronize, 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

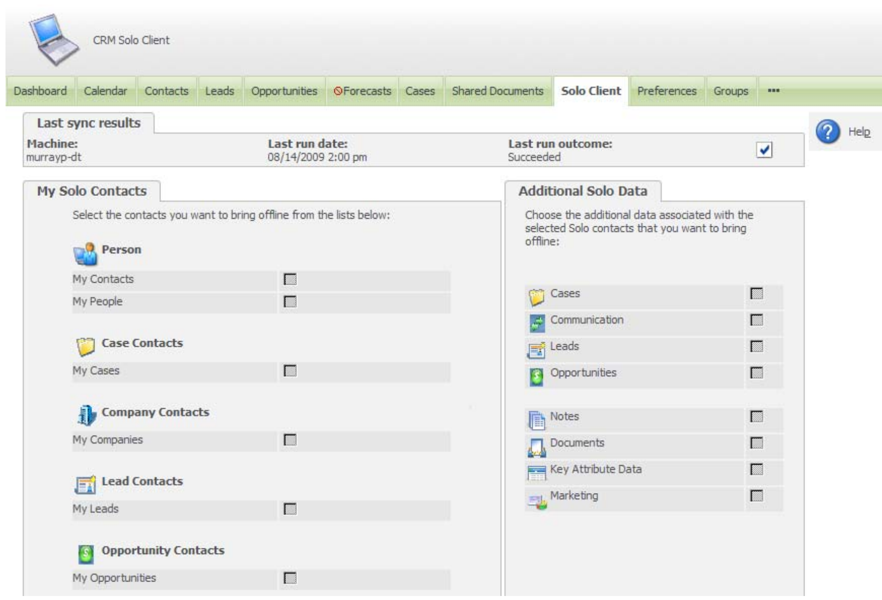
   Once the synchronization is complete, the Client Sync Summary screen is displayed.

   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 specified in your Centralized Solo 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 Synchronization Options panel and the Last Sync Results panel on the Client Sync Summary screen.

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. This option is also used to bring down files from the CRM server such as images, custom pages, etc.
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 check box 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, including the Synchronize button.

To log onto the Solo Client from within Microsoft Outlook:

1. Click on the CRM toolbar button.

   You are prompted to log onto CRM.

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

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

4. Select the Use HTTPS check box if you want to synchronize over the Internet. This is only necessary if your administrator has enabled SSL.

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.

It is possible to synchronize from the Solo client only and not from your Outlook session. 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 Snapshot Status tab.
- Customizing CRM.
- Rebalancing territories.
- Troubleshooting tips.

Snapshot Status

The Snapshot Status tab displays details of the current snapshot, for example when it was created. If a snapshot has already been created, the page displays a Recreate Snapshot button.

If you are making a large number of customizations, or if you have upgraded from a previous version of CRM, you should recreate the Snapshot for Solo clients. Snapshot tables are used to control what data each user has access to on their Solo client. There is one snapshot table for each primary table in the system. The first stage of the sync process populates the snapshot tables for the user with the IDs of all the records that match each user's centralized Solo profile. The snapshot tables are necessary to ensure that the correct data for each profile is synced.

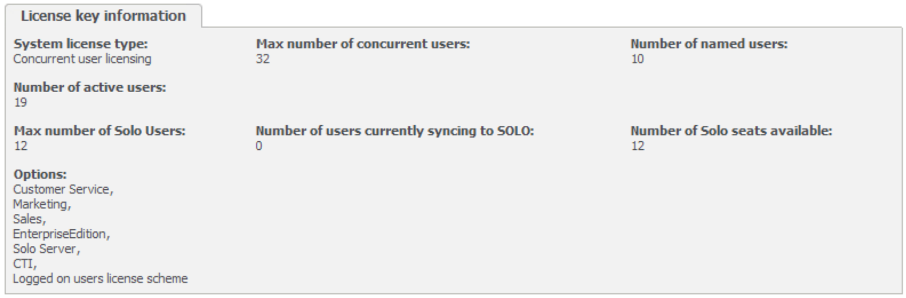
Clients will find synchronization quicker if the new Snapshot is available to them. When syncing with a recreated snapshot, the client data is synchronized, along with any schema or metadata changes that have occurred since the original snapshot was created.

To recreate a snapshot:

1. Open Administration | Users | Solo and navigate to the Snapshot Status tab.
2. Click the Recreate Snapshot button.

Viewing Solo Licensing Information

You can view Solo licensing information in Administration | System |License Key Details.



License Key Information panel

The table below explains the Solo fields on the License Key Information panel on a Solo install.

Field	Description
Max Number Of Solo Users	Number of Solo users specified in the license activation code. Read-only.
Number Of Users Currently Syncing To Solo	Number of Solo users who are set up with a Solo client and syncing with the Solo server.
Number of Solo Seats Available	Remaining number of Solo seats available (i.e. The maximum number of Solo users specified in the license activation code minus the number of Solo users currently synching). Read-only.

Note: If your system includes the System Expiry option and your Solo license key expires, you need to update the Solo Server license key and re-install the Solo client.

Customizing CRM

Any customizations you do on the server after users have been enabled are 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 following fields on the Table Details screen when creating new tables, making new table connections, and making decisions on whether or not you want make the tables available to Solo Clients:

- Solo Options
- Solo Date Filtering

To access the Solo Options and Solo Date Filtering fields:

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.
   - **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.
   - **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.

4. Click on the Solo Date Filtering field to view the date filtering options. You can choose to exclude data that is older than 30, 60, 90, 180 or 365 days.

Creating New Views on the Solo Server

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

To enter the SQLiteversion of a view:

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

View Errors

If a SQLiteversion 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, a SQLiteversion of the view is probably necessary.

To create a SQLiteversion of a view:

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

1. **`TOP n`**. This command does not exist in SQLite. 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 SQLite, 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 SQLite, it needs to be replaced with the **`COALESCE`** function.

   For example,

   ```
   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 SQLite. Remove them. There is no equivalent function to replace them with.

6. Case Sensitivity.

   SQLite 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

An error message will appear if you exceed your Solo Subscriber Identity Range while working on the Solo Client:

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 ..\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 Snapshot Summary tab.
- Customize CRM.
- Rebalance territories.
- Explain troubleshooting tips.

Chapter 9
Upgrading Solo Client

In this chapter you will learn about:

- License types and upgrading.
- 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.

License types and upgrading

A new external application is shipped with CRM to enable you to change the license key outside of the CRM application. When changing the license type from Named User Licensing to Concurrent User Licensing or vice versa, it is important to consider the number of currently enabled Solo users and whether the new license type will support them.

Changing from Named User to Concurrent User Licensing

- Example 1: If you change a 10 user Named User License to a 5 user Concurrent License and the License Type field on the User table has not been changed to Concurrent for at least 5 users, no users will be allowed to log onto the system.
- Example 2: If you change from a 15 user Named User license to a 5 user Concurrent License where there are 7 existing Solo users, even if the User License Type field for the non-Solo Named Users is automatically changed to Concurrent, there will still be too many Named Users for the System License. In this scenario, the System Administrator should disable the extra Solo users before changing the System License.

  Note: When using Concurrent User Licensing, it is recommended that certain users are set to be named users even if they are not Solo users, for example the System Administrator and the escalation engine.

Changing from Concurrent User to Named User Licensing

When changing from a Concurrent User license to a Named User license, it is important to ensure that the number of named user licenses on the new license key is greater than or equal to the current number of active enabled users in the database. If there are not enough Named Users on the new license to make the change, the System Administrator must disable some existing concurrent users before proceeding.

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.

  Note: The system administrator will need to create a new Solo Snapshot if upgrading with Option 2.

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. Recreate the Solo snapshot.
3. 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 7.0 .dll.

4. When the synchronization has completed, reboot your machine.
5. 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 7.0 from version 6.2 SP1. 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 6.2 SP1 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 6.2 SP1 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.
6. Recreate the Solo Snapshot.

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 ..\WINDOWS\Downloaded Program Files.
3. Type **del off*** and select the Return key.

   The 6.2 SP1 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...

- Discuss license types and upgrading.
- 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.