Sage SalesLogix E-marketing Client New Install Procedure

- 1. Open up the Sage SalesLogix Administrator and log in as an Admin.
- 2. Navigate to the *Bundle Manager* by clicking on the *Bundles* button on the left-hand pane.



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- 3. Once in the Bundle Manager click the Install button.
- 4. Navigate to the Sage SalesLogix E-marketing Manger LAN bundle, select it and click Open.



5. On the Choose Actions to Install window ensure all options are checked and click the OK button.

🎄 Choose Actions to Install	<u>_ ×</u>
Install Action	ПК
✓ Insert Plugin (Forms System:SpLicenseAgreementForm)	
✓ Insert Plugin (Forms System:SpManagerAccountLookupForm)	Concol
✓ Insert Plugin (Forms System:SpManagerSetupOptionsForm)	Cancer
✓ Insert Plugin (Scripts, VBscript System:SpManagerStartupScript)	11-la
 Insert Plugin (Menus System:SpManager Menu) 	нер
 Insert Plugin (Forms System:SpManagerLogin) 	
Insert Plugin (Forms System:SpManagerMainForm)	Toggle
Insert Plugin (Forms System:SpManagerInitForm)	
✓ Insert Plugin (Forms System:SpManagerMapUsersForm)	Tagala All
 Insert Plugin (Forms System:SpManagerMapMailMergeForm) 	T Oggle All
Insert Plugin (Forms System:SpManagerAddUserForm)	
Insert Plugin (Forms System:SpManagerAccountSetupForm)	Properties
✓ Insert Plugin (Forms System:SpManagerEmailFooterForm)	
 Insert Plugin (Forms System:SpManagerAccountImportForm) 	
Create Table SPEACCOUNTS [Structure, Indices]	
Create Table SPEAUTHUSER [Structure, Indices]	
Create Table SPEQUERYTAG [Structure, Indices]	
Create Table SPELICENSE [Structure, Indices]	
Create Table SPEMAILMERGE [Structure, Indices]	
Create Table SPESYNC [Structure, Indices]	

6. Click *Yes* on the next window to release the bundle.

nformation	×
The following installed plugins do not have releases. Do you want to release th Insert Plugin (Forms System:SpLicenseAgreementForm) Insert Plugin (Forms System:SpManagerAccountLookupForm) Insert Plugin (Forms System:SpManagerStartupScript) Insert Plugin (Scripts, VBscript System:SpManagerStartupScript) Insert Plugin (Forms System:SpManagerMenu) Insert Plugin (Forms System:SpManagerInitForm) Insert Plugin (Forms System:SpManagerMainForm) Insert Plugin (Forms System:SpManagerMainForm) Insert Plugin (Forms System:SpManagerMapUsersForm) Insert Plugin (Forms System:SpManagerAgDUsersForm) Insert Plugin (Forms System:SpManagerAdDUserForm) Insert Plugin (Forms System:SpManagerAccountSetupForm) Insert Plugin (Forms System:SpManagerAccountSetupForm) Insert Plugin (Forms System:SpManagerAccountSetupForm) Insert Plugin (Forms System:SpManagerAccountImportForm) Insert Plugin (Forms System:SpManagerAccountImportForm)	em?

7. Select the Sage SalesLogix Team you would like the bundle released to, then click OK



- 8. In the *Bundle Manager* click the *Install* button again to install the second bundle.
- 9. Navigate to the *Sage SalesLogix E-marketing* LAN bundle, select it and click *Open*.

🏠 Open				×
Look in:	📙 E-marketing		- 🗿 🤌 📴]-
Recent Places Desktop Administrator	Name A Sage SalesLo	gix E-marketing 7.5.2.15 gix E-marketing Manager 7.5.2.1	 Date modified 3/31/2010 2:02 PM 3/17/2010 12:00 	Type Architect Bundle Architect Bundle
	•			Þ
	File name:	Sage SalesLogix E-marketing 7	.5.2.15 💌	Open
	Files of type:	SalesLogix Bundle (*.sxb)	•	Cancel



10. On the *Choose Actions to Install* window ensure all options are checked and click the *OK* button.

🎊 Ch	pose Actions to Install	_ 🗆 ×
Install	Action	OK
 	Insert Plugin (Forms System:SpEmarketingDripResultsForm)	UK
1	Insert Plugin (Forms System:SpEmarketingForm)	
1	Insert Plugin (Scripts, VBscript System:SpEmarketingStartupScript)	Lancel
×	Insert Plugin (Forms System:SpEmarketingLoadingForm)	
×	Insert Plugin (Menus System:SpEmarketing Standard Menu)	Help
×	Insert Plugin (Toolbars System:SpEmarketing Toolbar)	
×	Insert Plugin (Forms System: SpEmarketingAccountForm)	Tanala
×	Insert Plugin (Forms System:SpEmarketingTagsForm)	roggie
v	Insert Plugin (Forms System:SpEmarketingSendForm)	T 1 AU
× .	Insert Plugin (Forms System:SpEmarketingScheduleForm)	I oggle All
× .	Insert Plugin (Forms System:SpEmarketingSendAsForm)	
× .	Insert Plugin (Forms System:SpEmarketingValidateAddrForm)	Properties
 V 	Insert Plugin (Forms System:SpEmarketingSendAsSummaryForm)	riopenies
v	Insert Plugin (Forms System: SpEmarketingSendAsErrorForm)	
× .	Insert Plugin (Forms System:SpEmarketingSurveyResultsForm)	
× .	Insert Plugin (Forms System:SpEmarketingAssignUserForm)	
× .	Insert Plugin (Forms System: SpEmarketingDripSyncForm)	
× .	Insert Plugin (Forms System:SpEmarketingCreateGroupForm)	
× .	Insert Plugin (Forms Lead:E-marketing History)	
~	Insert Plugin (Forms Contact: E-marketing History)	
×	Create Table SPESEND [Structure, Indices]	
×	Create Table SPEHISTORY [Structure, Indices]	
×	Create Table SPELEADHISTORY [Structure, Indices]	
×	Create Table SPESURVEYRESPONSES [Structure, Indices]	
× .	Create Table SPESURVEYS [Structure, Indices]	
× .	Create Table SPESYNC [Structure, Indices]	

11. Click Yes on the next window to release the bundle.

Information 🔀
The following installed plugins do not have releases. Do you want to release them? Insert Plugin (Forms System:SpEmarketingDripResultsForm) Insert Plugin (Sripts, VBscript System:SpEmarketingGadingForm) Insert Plugin (Compton System:SpEmarketingCadingForm) Insert Plugin (Menus System:SpEmarketingCadingForm) Insert Plugin (Toolbars System:SpEmarketing Standard Menu) Insert Plugin (Toolbars System:SpEmarketing CocumForm) Insert Plugin (Forms System:SpEmarketingCacoumForm) Insert Plugin (Forms System:SpEmarketingScheduleForm) Insert Plugin (Forms System:SpEmarketingSchedAsSumaryForm) Insert Plugin (Forms System:SpEmarketi
Yes No

12. Select the Sage SalesLogix *Team* you would like the bundle released to, then click *OK*

🏠 Choose Teams	
Everyone	ОК
	Cancel
	Help
	Add
	Remove