SWIFTPAGE MANAGER for SALESLOGIX 6.2 and 7.0+
INSTALLATION GUIDE

Note SwiftPage recommends that you only release this plug-in to Managers or Admins

Install/Upgrade 'Swiftpage[v.3.5.5] Manager for SalesLogix 6.2' bundle

- Start 'SalesLogix Administrator' and log on as someone with Admin privileges
- Press 'Bundles'
- Click 'Install'
- Navigate to the directory where you copied the SwiftPage*.sxb bundle
- Select the latest version of the SwiftPage bundle based on the '[v.2.5.XX-00]'
- Click 'Open'
- If you are prompted to upgrade the bundle, click 'Yes'
- On the 'Choose actions to install' window, click 'OK'
- Click 'YES' to all questions and or prompts.
- Choose Teams (if asked too)
- Click 'OK'
- Close 'Bundle Manager' window

Make manager menu item available to desired clients

- In 'SalesLogix Administrator' select Tools->Options…
- Select the 'Client Plugins' tab
- Select 'Menus'
  - if "Personal: SPE Manager Menu" is not in the Menu List
    - Click 'Add'
    - Expand 'Personal'
    - Select "SPE Manager Menu"
    - Click 'OK'
    - If asked to release the menu, release to desired Users

- Click 'OK' on the Options form

Miscellaneous Information

- A 'Refresh All' command must be performed on all clients in which the plug-in was released, so that the menu and toolbar will be visible and usable

- The tables created via the bundle install, are not removed upon uninstall. To removed the tables after uninstall, the Admin will have to 'Execute SQL' in the form of 'DROP TABLE' command