<u>**SWIFTPAGE for SALESLOGIX 6.2 or 7.0+**</u>
<u>**INSTALLATION GUIDE**</u>

<u>Install/Upgrade 'Swiftpage[v.3.5.5-00] for SalesLogix 6.2 or 7.0+' bundle</u>

- 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

<u>Make new Menu and Toolbar available to desired clients</u>

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

- Click 'OK' on the Options form

<u>Miscellaneous Information</u>

- 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 deleted upon uninstall.