



Sales Edition
Includes server and 5 Named Users

\$2,500

\$600 / Named User

Support Upgrade

Unlimited Named Users

Campaign Management Upgrade

Unlimited Named Users

Adv. Sales Upgrade

Named User upgrade

SalesLogix CRM Suite

Support Included

Campaign Management Included

Adv. Sales Included

SalesLogix Advanced CRM Suite

Support Included

Campaign Management Included

Adv. Sales Included

Adv. Customization & Security Included

SalesLogix Web CRM Suite
\$9,250

\$1,050 / Named User
\$850 / Concurrent Support User

Support Included

Campaign Management Included

Adv. Sales Included

Adv. Customization & Security Included

Web & Wireless Included

Includes 5 WebViewer Users

SALES EDITION UPGRADE POLICY
Upgrade to any CRM Suite for the price of the CRM Suite and difference in price of the Users

CRM SUITE UPGRADE POLICY
Upgrade to any Suite for the difference in price of the Suite and Users plus upgrade fee

SQL Server*
SQL Server Included for initial 5 users

SQL Server Database*
SQL Server licenses not included

SQL Server Database*
SQL Server licenses not included

SQL Server Database* or Oracle Database**
Database licenses not available from SalesLogix

Crystal Reports Pro
Includes unlimited report viewing and single user Designer

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SalesLogix Sales Edition

Includes the following Sales and Marketing features:

- ✓ Contact, Account, and Opportunity Management
- ✓ List/Group management with 1-click export to Excel integration
- ✓ Calendar
- ✓ Activity and Task management
- ✓ Library for storing Sales & Marketing collateral
- ✓ Advanced Outlook Integration (E-mail, Calendar, and Contacts)
- ✓ Mail Merge, including support for HTML templates with attachments
- ✓ Literature request & centralized fulfillment
- ✓ Contact Processes
- ✓ AutoSync - automatic synchronization (for remote users/offices)
- ✓ Synchronization using RAS or FTP
- ✓ Reporting using Crystal Reports 8.5 including unlimited report viewing and single user Report Designer (additional users available separately)
- ✓ Includes SQL Server 2000 for SalesLogix for initial 5 users*

• *Upgrades to additional Advanced Sales, Campaign Management, and Customer Support features are available.*

SalesLogix CRM Suite

Includes all of the above SalesLogix Sales Edition features, **plus** the following Advanced Sales, Campaign Management, and Customer Support features:

- ✓ Sales Processes
- ✓ Forecasting
- ✓ Quotes and Sales Orders
- ✓ Campaign Management
- ✓ Ticket and activity management
- ✓ Defect management
- ✓ RMA management
- ✓ Service Contract management
- ✓ List / group management
- ✓ Multi-field search capability
- ✓ Notification manager
- ✓ Support Client SpeedSearch search capability for standard indexes including Tickets, Defects, Procedures, and Standard Problem
- ✓ SQL Server Host Database*

• *Upgrade to advanced functionality is available.*

SalesLogix Advanced CRM Suite

Includes all of the above SalesLogix Sales Edition and Base CRM Suite features, **plus** the following customization and security features:

- ✓ Customer may add and edit Basic and SQL scripts to customizations
- ✓ Customer may modify the Account, Contact, and Opportunity Detail views
- ✓ Customer may add new Account, Contact, & Opportunity tabs that can either display data in a grid form or contain fields that the user can update
- ✓ Customer may create different Account, Contact, and Opportunity Detail views for different users.
- ✓ Customer may add Data and Managed type views. These views are used to: provide tables that are not related to the Account, Contact, and Opportunity tables and build more complex dialogs such as the Sales Order and Product dialogs.
- ✓ May schedule Agents from Administrator
- ✓ Field level Security Profiles
- ✓ Admin Roles can be assigned to users.
- ✓ Ability to create User Teams for access to Accounts owned by individuals.
- ✓ Ability to change the user security settings via Security tab, including:
 - can change user access to all tables
 - can restrict user from creating personal contacts
- ✓ Includes one Web External Access license for external application access to SalesLogix data***
- ✓ SQL Server Host Database*

• *Upgrade to additional Web and wireless functionality is available.*

SalesLogix Web CRM Suite

Includes all of the above SalesLogix features, **plus** the following Web and wireless features:

- ✓ Web Client - access information via Internet with browser
- ✓ Wireless clients - access information via web phone or other supported wireless device
- ✓ WebTicket customer self-service portal
- ✓ Web Reporting - includes 5 concurrent user licenses for Crystal Enterprise 8
- ✓ LeadCapture to input contacts directly from web page
- ✓ 5 WebViewer licenses included for read-only access
- ✓ Includes one Web External Access license for external application access to SalesLogix data***
- ✓ SQL Server Host Database (SQL Server licenses are not available from SalesLogix for Web & Wireless implementation)*
- ✓ Oracle Host Database available**



ADD-ON PRODUCTS:

DynaLink v2.1 for SalesLogix

- ✓ Integration to back-office systems
- ✓ **Includes** one Web External Access license for external application access to SalesLogix data***
- ✓ **Please note:** Requires SalesLogix v6.1, v6.1 SP1 or higher is highly recommended
- ✓ **Please note:** Requires Advanced Sales module, Sales Edition without Advanced Sales is not compatible
- ✓ **Please note:** Every SalesLogix user must be licensed for DynaLink

SalesLogix PivotReporter

- ✓ SalesLogix Pivot Reporter allows users to quickly create reports using the information in your SalesLogix database without report-writing training or SQL syntax knowledge
- ✓ **Includes** one Web External Access license for external application access to SalesLogix data***
- ✓ **Please note:** Not compatible with Oracle Host Database
- ✓ **Please note:** English-only; Requires Windows Sales Client to operate
- ✓ **Please note:** Not qualified for ASP (hosted) solutions

SalesLogix KnowledgeSync

- ✓ Identify critical SalesLogix data and automatically send alerts to users & managers
- ✓ Automatically update SalesLogix contacts, accounts, and History with important information
- ✓ Generate and distribute Crystal reports automatically, based on a predefined schedule and data conditions in SalesLogix
- ✓ Identify incoming e-mail and automatically take actions based on content
- ✓ Auto update SalesLogix by scheduling new activities, notifying recipients, and recording transactions
- ✓ **Includes** one Web External Access license for external application access to SalesLogix data***

SalesLogix KnowledgeSync - Additional Connector

- ✓ Connect KnowledgeSync to an additional, non-SalesLogix data source

Integrated Service Alerts (ISA)

- ✓ **Requires KnowledgeSync**
- ✓ **Includes** 1 Concurrent Support User required for operation
- ✓ Create tickets from e-mail
- ✓ Communicate turnaround time to customers
- ✓ Monitor and escalate outstanding tickets
- ✓ Capture e-mail traffic and update existing tickets
- ✓ Notify account managers of new accounts and contacts
- ✓ Protect the confidentiality of service reps' private e-mail addresses
- ✓ **Please note:** Not qualified for Oracle 9i.

Crystal Reports for SalesLogix

Crystal Reports 8.5 Professional

- ✓ Crystal Report 8.5 Professional - Single-user Report Designer for use with SalesLogix
- ✓ **Please note:** 1 single-user Report Designer included with each SalesLogix Suite
- ✓ Support included with SalesLogix fees
- ✓ No maintenance charges or guarantees

Crystal Enterprise 8 Standard

- ✓ Crystal Enterprise 8 Standard - 5 concurrent user pack (web) for use with SalesLogix
- ✓ **Please note:** 5 concurrent users included with SalesLogix Web CRM Suite and Upgrade
- ✓ Support included with SalesLogix fees
- ✓ No maintenance charges or guarantees

SQL Server for SalesLogix

SQL Server 2000 Standard for SalesLogix*

- ✓ SQL Server 2000 Standard Edition for SalesLogix – 1 SalesLogix User
- ✓ **Please note:** Cannot be sold with Web CRM Suite*
- ✓ Support included with SalesLogix fees
- ✓ No maintenance charges or guarantees



NOTES:

- * **SQL Server for SalesLogix**
 - ✓ See FAQ later in this document for complete details of SQL Server licenses
 - ✓ SQL Server for SalesLogix not available with Web CRM Suite – contact a Microsoft reseller
- ** **Oracle Host Database**
 - ✓ Requires Classic Care – Ultra support and maintenance plan
- *** **External Access**
 - ✓ See FAQ later in this document for complete details of External Access licenses
 - ✓ Each external application that accesses SalesLogix data with the SalesLogix OLE DB Provider **and makes such data available to non-SalesLogix users** requires a Web External Access license – for example customer directory Intranet/Web pages, ASP/ASP.Net, Web Services, etc.
- SalesLogix Licenses**
 - ✓ See *SalesLogix License Reference* for complete details of software licensing and restrictions

UPGRADE SalesLogix Sales Edition to CRM functionality:

Campaign Management Upgrade ✓ Campaign Management

Support Upgrade

- ✓ Ticket and activity management
- ✓ Defect management
- ✓ RMA management
- ✓ Service Contract management
- ✓ List / group management
- ✓ Multi-field search capability
- ✓ Includes SpeedSearch search capability for standard indexes including Tickets, Defects, Procedures, and Standard Problem
- ✓ Notification manager

Advanced Sales Upgrade

- ✓ Sales Processes
- ✓ Forecasting
- ✓ Quotes and Sales Orders



Licensing External Applications for use with SalesLogix v6

Each external application that accesses SalesLogix data with the SalesLogix OLE DB Provider and **makes such data available to non-SalesLogix users** requires a Web External Access license. This license is available with Advanced or Web CRM Suites. This license is **not** required for customizations built solely for use within a SalesLogix Client (including Bundles and applications inside a SalesLogix Client) since only SalesLogix users can access these customizations.

Some examples of external applications that would require this license include:

- Intranet/Web pages that provide customer directory information to all employees (many non-SalesLogix users)
- Applications that pull SalesLogix data for data warehousing or analysis and present that information to non-SalesLogix users
- Reports or spreadsheets that pull information from SalesLogix which are distributed to non-SalesLogix users

Named User license(s) may also be required if SalesLogix data is updated – use of “Administrator” user for this purpose is not supported. The “Administrator” user is intended for administration of SalesLogix and has full security access.

Please note that the Microsoft or Oracle database must also be properly licensed for use with external applications (contact your database reseller). The SQL Server for SalesLogix licenses available with SalesLogix are strictly for use with SalesLogix Users – they do not cover any external application or other user access to the database.

Q: Why the new license?

A: Previously, all users that accessed SalesLogix data were required to purchase a SalesLogix user license. Many customers requested the ability to expose SalesLogix to additional users (such as a customer directory Intranet page) without the cost of licensing per user. This is meant to cost effectively allow external applications access SalesLogix data and is licensed per application. One license will be included in the Advanced and Web Suites.

Q: Why new limits on the “Administrator” user?

A: These are not new limits – we’ve always recommended against use of Administrator login for non-administrative tasks and this is just clarification. The “Administrator” user is provided for administrative access to the system. We have not enforced any restrictions on use of this user, but there are issues with widespread use of “Administrator”. In rare cases, user data may be overwritten by Admin (for example, conflict resolution may be “overridden” by Admin user). Also, “Admin” has security rights to the entire system which may lead to incorrect information being exposed to users with no way to restrict the data.

Q: So I need an External Access license and a Named User license for each external application?

A: Maybe not, multiple external applications may share the same Named User license depending on the implementation – they should not use the “Administrator” license.

Q: Is an External Access license required for all add-on products and customizations?

A: No, if the add-on product or customization is only accessed by licensed SalesLogix users, this license does not apply and is not required. Only applications that expose SalesLogix data to non-SalesLogix users require this licensing. Add-on products offered by SalesLogix

(such as Pivot Reporter) will include the External Access license.

Q: Do other Tech Partner products require the External Application license?

A: No, as long as all users are licensed SalesLogix users. Tech Partner products will require the external access license if non-SalesLogix users are accessing the results.

Q: What if the application does not use the SalesLogix OLE DB Provider – do I still need this license?

A: Due to data integrity (sync and security) considerations, we will not support a SalesLogix implementation that updates SalesLogix data without using the SalesLogix OLE DB Provider.

Q: Does this license apply to existing customers? If so, how much time to do they have to comply with the license requirements?

A: We will work with partners to transition and upgrade customers. We don't intend to “crack down” on current customers with current applications. However, we do request that partners report such external applications so we may provide a minimal or no cost upgrade to keep the customer current with licensing. We do want to set better expectations for the future and give more options to extend SalesLogix.

SCENARIO: A customer writes a Web Portal that shows customer information from SalesLogix on a Web page. The users of the system are all licensed to use SalesLogix. Do they need to purchase any additional licenses?

A: No, as long as all the users are SalesLogix users, nothing else is required if the users are logging in. An additional Named User may be required if the application is not using the user’s logins. If the portal logs in as “Administrator” there are chances that information can be presented to the users that is not appropriate (basically



bypassing security) and the fact that the "Administrator" login is intended for administrative tasks, not data access and update.

SCENARIO: A customer writes a Web page that allows end customers to update their information. What licenses are required?

A: First, you must license SQL Server from Microsoft (or Oracle) to cover this scenario – SQL Server for SalesLogix licenses that we offer are not valid for non-SalesLogix users. You must also purchase the External Access license plus at least one Named User for all customers (not one user license per customer) - "Administrator" is not a valid user to use for this scenario.

SCENARIO: A customer writes a Web portal that provides SalesLogix information to Management. What licenses are required?

A: Same as above scenario for customers at minimum. If managers want segmented data (by region for example), each manager may require a user license for security purposes.

SCENARIO: A customer has a sales data warehouse. Do they need a license to pull the data from the SalesLogix database to another database?

A: Yes, most likely. If such data is used by non-SalesLogix users, the External Access license is required.

The customer must also be sure to properly license the Microsoft or Oracle database – the SQL Server for SalesLogix licenses do not apply for such use.

SCENARIO: Customers have customizations and several Tech Partners offer tools for data migration, data cleansing, or data archive tools. Do such tools require this license?

A: No, the end result of such data tools is to provide access to data by SalesLogix users. Only if this data were made accessible to non-SalesLogix users is this license required.

SCENARIO: Customer is implementing a "back-office" (or any other system) integration to provide SalesLogix users access to other system data. Do such integrations require this license?

A: No, the integration is providing data to SalesLogix users who are already licensed for SalesLogix.

SCENARIO: Customer is integrating SalesLogix customer data into an existing system to eliminate duplicate data entry and have one master customer record. Do such integrations require this license?

A: Yes, most likely. In most cases, the existing system will be used by non-SalesLogix users. Therefore, they must use the external application license to give those non-SalesLogix users access to the data.



Licensing Microsoft® SQL Server™ 2000 for use with SalesLogix v6

Partners may purchase Microsoft® SQL Server™ 2000 Standard Edition for SalesLogix licenses with SalesLogix users in most Suites. All SalesLogix users on a SQL Server Host Database must be licensed for SQL Server including Remote users (other options such as Processor licensing are available from a Microsoft reseller). It is the partner or customer responsibility to properly license SQL Server (or Oracle) for the specific customer environment.

SQL Server is provided on a separate CD with the software license agreement, the server software, and a SQL CAL is included for each SalesLogix user. The customer must use the included SQL Server license solely for the purposes of hosting the SalesLogix database for SalesLogix Users. Using this instance of SQL Server for any other purpose but hosting SalesLogix is not permitted.

For more information on SQL Server 2000, refer to the Microsoft SQL Server site <http://www.microsoft.com/sql> including the topic "Choosing an Edition of SQL Server 2000" and the "SQL Server 2000 Licensing FAQ" at <http://www.microsoft.com/sql/howtobuy/faq.asp>.

Q: What SQL Server licenses and/or Client Access Licenses (CALs) are required to use SalesLogix with SQL Server?

A: SQL Server 2000 must be licensed for every SalesLogix user if the SalesLogix Host database is using SQL Server. Even SalesLogix Remote Clients must have valid SQL Server licenses as they indirectly access the SQL Server via synchronization (the Sync Server does not have to be licensed for SQL Server).

Q: Are SQL Server licenses included with SalesLogix?

A: No, SQL Server must be ordered separately and must be ordered for every SalesLogix user. SQL Server may also be purchased from a Microsoft reseller. A SQL Server license is provided with SalesLogix Sales Edition and a CAL is provided for the initial 5 SalesLogix Users.

Q: What version of SQL Server is included?

A: The version of Microsoft SQL Server available with SalesLogix is "Microsoft SQL Server 2000 Standard Edition for SalesLogix". For more information on SQL Server 2000 Standard Edition, refer to the Microsoft SQL Server site above.

Q: How many users can I license from SalesLogix?

A: The version of Microsoft SQL Server provided with SalesLogix is the Standard Edition for SalesLogix which is designed for smaller number of users and is intended for smaller servers that host only SalesLogix. Once you exceed 20-50 users or which to use multiple databases, you will need to upgrade to a more advanced version of SQL Server which is available from a Microsoft reseller.

Q: A customer wants to run a SalesLogix SQL database as well as another SQL database developed internally. Is this permitted?

A: No, a separate SQL Server license is required. The SalesLogix SQL Server license only allows the SalesLogix database to be hosted on that SQL Server.

Q: Are there licensing costs for using SalesLogix Remote Clients?

A: All SalesLogix users (including remote users) must be licensed to use SQL Server when SQL Server is the Host database. Microsoft SQL Server 2000 Desktop Engine (MSDE) is used on the Remote Clients and is based on the core SQL Server functionality. No additional licenses are required for the MSDE databases.

Q: Is the included SQL Server fully functional?

A: Yes, it is fully functional for use with SalesLogix. A customer may use it solely for the purposes of hosting the SalesLogix database. Using this instance of SQL Server for any other purpose but hosting SalesLogix is not permitted. Should a customer want to use SQL Server for other purposes, they should contact a Microsoft Reseller for additional SQL Server licensing.

Q: Are SQL Server licenses available for the Web CRM Suite?

A: No, SQL Server licenses are required but not available from SalesLogix for the Web Suite. The Web Suite allows access to the SQL Server information externally and by non-SalesLogix users via Web Ticket, LeadCapture, etc. This requires specific SQL Server Processor licensing - contact a Microsoft reseller.

Q: Are my existing SQL Server licenses still valid if I upgrade to the Web CRM Suite?

A: Yes, as long as only existing SalesLogix Users are accessing the database and are all licensed for SQL Server. Additional SQL Server licenses cannot be purchased from SalesLogix for the Web CRM Suite at this time. Web functionality such as WebTicket and other external web access require additional SQL Server licenses – contact a Microsoft reseller. No refunds or trade-ins for existing SQL Server licenses are available.