

# Professional Services

## CRM Sales Software Free Trial Rapid Roll-out Project Guide



What you need to sell.™



## Rapid Rollout CRM Sales Software Customer Profile

**Navigating the Customer Profile:** Use the scroll bar to read content. Click on the document to get to the nearest field that will accept data. Use the Tab and Shift+Tab keys to move between fields. Or just click on the gray fields to enter data. To select and de-select checkboxes, click on the checkbox or press the space bar.

If you have any questions about the Rapid Rollout CRM Sales Software Customer Profile, contact your Project Manager or send e-mail to xxxxxxxxxxxxxx.

### I. Primary Contact Information

1. Submitted by:
2. Phone:
3. E-mail address:
4. Date submitted:

### II. Corporate Profile

1. Company name:
2. Web Site URL:
3. Brief Industry description:
4. Brief company description:

### III. General Project Information

1. Specify preferred dates for the implementation:
2. Specify any dates that will not work for you:

### IV. Project Contacts

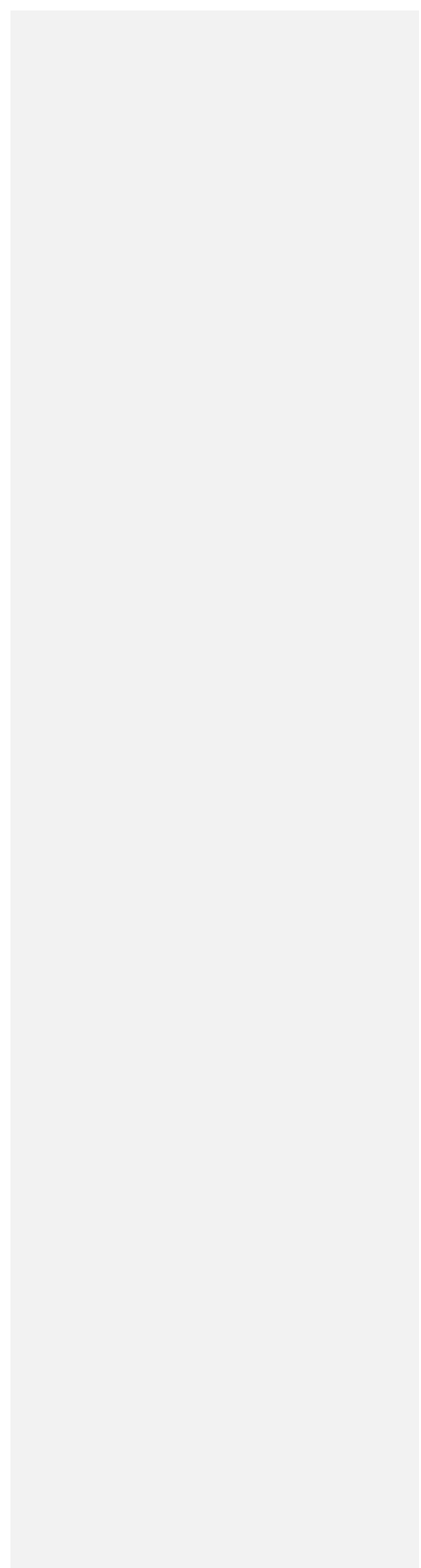
Complete the following contact information for your Management Sponsor, your Network Administrator who may be contacted with technical questions, and your CRM Sales Software Free Trial System Administrator and others (if applicable).

Contact Title	Name	Phone, Ext.	E-Mail
Upper Management Sponsor			
Sales Management Sponsor			
CRM Sales Software Free Trial System Sales Administrator *			
CRM Sales Software Free Trial System IT Administrator			
Network Admin			

*\*The person that would be the CRM SALES SOFTWARE administrator once CRM Sales Software Solutions services are no longer needed. We suggest that all System Administrators attend a CRM Sales Software Free Trial System Administrator class.*

Please indicate who will be in charge of getting this document completed and returned to CRM Sales Software Solutions to facilitate moving forward on project activities, quotes (if needed) and timelines? Due date, as soon as possible.

Contact Title	Name	Phone	E-Mail



**V. Checklist of items needed to evaluate the implementation of the CRM Sales Software Free Trial System Configuration**

**Please supply the following:**

**Completed Rapid Rollout CRM Sales Software Survey by**

**Client Executive Management Team Contribution:**

**Management Mission Statement:** Please supply a short “management mission statement” describing goal of the planned CRM system.

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**Management’s Vision:** Please provide a description of the “scope of work”, “Start and End Dates” and the corresponding expected measurable results for each phase of the new CRM sales software system rollout.

**Phase I - Scope and Expected Measurable Results:**

Expected Start Date:                      Expected End Date:

-----  
**Phase II – Scope and Expected Measurable Results:**

Expected Start Date:                      Expected End Date:

-----  
**Phase III – Scope and Expected Measurable Results:**

Expected Start Date:                      Expected End Date:

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**Items not detailed in Rapid Rollout CRM Sales Software document but required:**

- Screen shots of your currently used systems with detailed comments about the usage of each system.
- Copies of current reports used by each department with detailed comments about the usage of each report.

**Items detailed in Rapid Rollout CRM Sales Software document and are required:**

- User List:** List of user that will be accessing CRM Sales Software Free Trial (page 3)
- Security:** A general proposal of how your company will configure the Rapid Rollout CRM Sales Software user security model (page 3)
- Data Sharing:** A general list of the teams you will be using and the associated team members. If applicable (page 3)
- Customer Communications:** Three corporate word processor merge templates (page 5)
- Date Sources:**
  - Please supply a comprehensive list of data sources to be imported (page 5)
  - Number of data sources
  - Number of records in each data source
  - Number of fields in each data source
- Departments:** A comprehensive list of the departments that are to be implemented in Rapid Rollout CRM Sales Software Phase I. (page 5)
- “Account Detail View”** additional fields w/pick lists (page 6)
- “Contact Detail View”** additional fields w/pick lists (page 8)
- “Opportunity Detail View”** additional fields w/pick lists (page 10)
- “Contact Level Groups”** custom contact filters (page 12)
- “Account Level Groups”** custom account filters (page 12)
- Hardware & Software Configuration:** Completion of your company’s current server configuration (page 14 - 15)

**Please complete the following information for each user that will be accessing CRM Sales Software Free Trial:**

*Note: In the "Reports To" column, enter the number corresponding to the name of that user's supervisor.*

**This Section below  
To be completed later.**

	First Name	Last Name	Reports To	LAN Based User?	Remote Laptop User?	New CRM SALES SOFTWARE User Name	New CRM SALES SOFTWARE Password
1				<input type="checkbox"/>	<input type="checkbox"/>		
2				<input type="checkbox"/>	<input type="checkbox"/>		
3				<input type="checkbox"/>	<input type="checkbox"/>		
4				<input type="checkbox"/>	<input type="checkbox"/>		
5				<input type="checkbox"/>	<input type="checkbox"/>		
6				<input type="checkbox"/>	<input type="checkbox"/>		
7				<input type="checkbox"/>	<input type="checkbox"/>		
8				<input type="checkbox"/>	<input type="checkbox"/>		
9				<input type="checkbox"/>	<input type="checkbox"/>		
10				<input type="checkbox"/>	<input type="checkbox"/>		
11				<input type="checkbox"/>	<input type="checkbox"/>		
12				<input type="checkbox"/>	<input type="checkbox"/>		
13				<input type="checkbox"/>	<input type="checkbox"/>		
14				<input type="checkbox"/>	<input type="checkbox"/>		
15				<input type="checkbox"/>	<input type="checkbox"/>		
16				<input type="checkbox"/>	<input type="checkbox"/>		
17				<input type="checkbox"/>	<input type="checkbox"/>		
18				<input type="checkbox"/>	<input type="checkbox"/>		
19				<input type="checkbox"/>	<input type="checkbox"/>		
20				<input type="checkbox"/>	<input type="checkbox"/>		

**Please complete the following information regarding the CRM Sales Software Free Trial security model:**

**CRM Sales Software Free Trial offers three security models that dictate which records each user can view and/or edit.**

**Please select one:**

**Everyone**

Users can view and edit every record that is created within the CRM Sales Software Free Trial database.

**Individual**

Users can only view and edit records that they create or that have been assigned to them. These records are not accessible by other users.

**Team**

Users can only view and edit records that are owned by teams for which that user is a member of. These records are not accessible by users not included in the team. Please define your team(s) below if applicable.

**Team 1**

Team Name:

Primary Team Member:

Other Team Members:

**Team 2**

Team Name:

Primary Team Member:

Other Team Members:

**Team 3**

Team Name:

Primary Team Member:

Other Team Members:

**Corporate Word Processor Merge Template – Customer Communications**

The CRM Sales Software Solutions Rapid Rollout CRM Sales Software implementation team will create three word processor merge templates to be used for your customer correspondence. Please provide a Microsoft Word document that you would like to use as your default merge template to your CRM Sales Software Solutions Rapid Rollout CRM Sales Software Project Manager.

**List the Data Sources to be migrated into new sales system.**

Please supply a comprehensive list of data sources, number of records and number of fields coming over from each data source.

Data Source Name	# of Records	# of fields	General Comments:
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

Please supply a comprehensive list of departments or Groups that are to be implemented in Phase I and the current system or systems they are using.

Department or Groups Name	# in Dept. or Group	Current System Used	Describe daily user workflow using new system:
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

Please complete the following information regarding your CRM Sales Software Free Trial customizations:

**1. Account Detail View**

The following is an example of the information provided on the CRM Sales Software Free Trial Account Detail view.

Account:	Interact Commerce Corp.	Main:	(602) 368-3700
Division:		Fax:	(602) 368-3799
Address:	8800 N. Gainey Center Dr.	Toll Free:	(602) 555-5555
	Suite 200	Misc.:	(602) 555-5555
City:	Scottsdale AZ	Web URL:	www.interactcommerce.com
Postal:	85258 USA	Region:	Southwest
Type:	Customer	Owner:	Everyone
Status:	Active	Acct. Mgr:	Administrator

You may specify up to 10 additional fields that you would like to appear on the Account Detail view.

Field Name	Number	Date	Text	If Text, Specify # of Characters
1.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
6.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
7.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
8.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
9.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
10.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

You may configure any of the following pick lists, which appear on the Account Detail view:

<b>Account Type</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b>Account Status</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b>Account Status</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 1</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 2</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		

<input type="checkbox"/> Users cannot edit items		
<b># 3</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 4</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 5</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 6</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 7</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 8</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 9</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 10</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		

## 2. Contact Detail View

The following is an example of the information provided on the CRM Sales Software Free Trial Contact Detail view.

Contact:	John Doe	Work:	(602) 368-3700
Account:	Interact Commerce Corp.	Fax:	(602) 368-3799
Title:	Manager	Mobile:	(602) 555-5555
Department:	PSG	Home:	(602) 555-5555
Address:	8800 N. Gainey Center Dr.	Pager:	(602) 555-5555
	Suite 200	PHnt:	5555
City:	Scottsdale AZ	E-Mail:	jdoe@interactcommerce.com
Postal:	85258 USA	Web:	www.interactcommerce.com
Privacy Contact:	<input checked="" type="checkbox"/>	Referral:	Jane Doe
Type:	Customer	Owner:	Everyone
Status:	Active	Acct. Mgr:	Administrator

You may specify up to 10 additional fields that you would like to appear on the Contact Detail view.

Field Name	Number	Date	Text	If Text, Specify # of Characters
1.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
6.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
7.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
8.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
9.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
10.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

You may configure any of the following pick lists, which appear on the Contact Detail view:

<b>Contact Type</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b>Contact Status</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b>Contact Department</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 1</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 2</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		

<input type="checkbox"/> Users cannot edit items		
<b># 3</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 4</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 5</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 6</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 7</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 8</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 9</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 10</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		

### 3. Opportunity Detail View

The following is an example of the information provided on the CRM Sales Software Free Trial Opportunity Detail view.

Opportunity:	Sales Opportunity	Lead:	Web
Account:	Interact Commerce Corp.	Quality:	
Acct Mgr:	Administrator	Process:	
Potential:	\$16,000.00	Stage:	Budget Approval
Probability:	20 %	Step:	
Weighted:	\$3,200.00	Status:	Open
Actual Amt:		Closed:	<input type="checkbox"/>
		Reason:	
		Type:	
		Date Opened:	11/8/2001
		Est. Close:	11/29/2001
		Days Open:	0
		Actual Close:	

You may specify up to 10 additional fields that you would like to appear on the Opportunity Detail view.

Field Name	Number	Date	Text	If Text, Specify # of Characters
1.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
6.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
7.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
8.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
9.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
10.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

You may configure any of the following pick lists, which appear on the Opportunity Detail view:

<b>Lead Quality</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b>Opportunity Status</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b>Opportunity Won/Loss Reason</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b>Opportunity Type</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 1</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 2</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		

<input type="checkbox"/> Users cannot edit items		
<b># 3</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 4</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 5</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 6</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 7</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 8</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 9</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		
<b># 10</b>	<b>Enter desired values:</b>	<b>Notes:</b>
<input type="checkbox"/> Required entry		
<input type="checkbox"/> Text must match a list item		
<input type="checkbox"/> Users cannot edit items		

**1. Account Groups**

The following is an example of the sample groups that come with CRM Sales Software Free Trial:



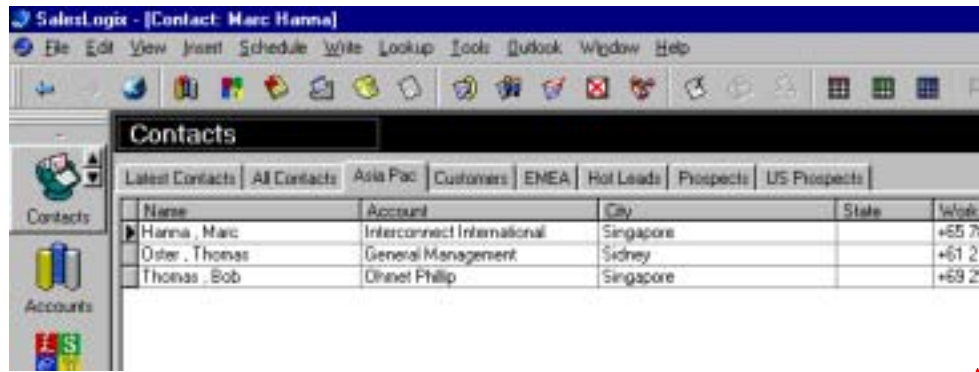
- Formatted
- Formatted
- Formatted
- Formatted
- Formatted

You may specify up to 10 additional groups to be included in CRM Sales Software Free Trial:

Group Name	Group description and definition. Please include filter criteria.
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

**2. Contact Groups**

The following is an example of the sample groups that come with CRM Sales Software Free Trial:



- Formatted
- Formatted
- Formatted
- Formatted

You may specify up to 10 additional groups to be included in CRM Sales Software Free Trial:

Group Name	Group description and definition. Please include filter criteria.
1.	
2.	

3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

## VI. CRM Sales Software Free Trial System Configuration

**Please specify the following information regarding your hardware and network:**

*Please do not install any CRM Sales Software Free Trial software. The CRM Sales Software Solutions Rapid Rollout CRM Sales Software implementation team will perform this task.*

1. Do **all** servers, workstations and laptops have a supported operating system and service pack (according to the CRM Sales Software Free Trial Network and Hardware Requirements) and have network connectivity?

Yes  No

2. Do **all** servers, workstations and laptops meet the published minimum configuration (according to the CRM Sales Software Free Trial Network and Hardware Requirements)?  Yes  No

If no, please explain:

*NOTE: Desktops and Laptops must have NT 4.0 w/SP 2 or higher, Windows 2000, or Windows 98*

3. NT domain name:

**Please specify the following information regarding your Database server:**

1. Database server machine name:

2. IP Address of Database Server machine:

3. Operating System and service pack installed:

4. Number of processors and processor speed:

5. Number of disk drives and size of each drive:

6. Memory size:

7. Has Microsoft SQL Server already been installed?  Yes  No

*If not, the Rapid Rollout CRM Sales Software implementation team will perform this task.*

8. What other software applications are installed on this server (not databases)?

*Note: We recommend that there are no mission critical software applications on this server.*

**If your Rapid Rollout CRM Sales Software implementation will include remote users, please complete the following:**

1. Synchronization Server machine name:

2. IP Address of Sync Server machine:

3. Operating System and service pack installed:

4. Number of processors and processor speed:

5. Number of disk drives and size of each drive:

6. Memory size:

7. Synchronization method that will be used:

Network sync (remote users will use network file shares to synchronize VIA dialup).

FTP sync (remote users will use an FTP site to synchronize). **RECOMMENDED**

a) FTP Server machine name: FTP sync can reside on the Synchronization Server.

b) FTP Server IP Address:

c) Port you have elected to use: The default is port 21.

*IMPORTANT: Microsoft Internet Information Server (IIS) is required for FTP sync and must be installed prior to your CRM Sales Software Free Trial Implementation. 3<sup>rd</sup> party FTP solutions are not supported. Please also note that the Rapid Rollout CRM Sales Software implementation team is not responsible for configuring/debugging the firewall or router for external FTP Sync.*

8. How would you prefer to resolve conflicts if two users alter the same data? Indicate the order of preference for four of the following options by assigning the numbers 1-4.

\_\_\_\_\_ User who made the change more recently wins. **RECOMMENDED**

\_\_\_\_\_ User who owns the record wins.

\_\_\_\_\_ The remote client user wins over the network client user.

\_\_\_\_\_ The network client user wins over the remote client user.

9. Subscription Rules:

Subscription rules define what records will be present in the remote user's database. These rules are used to limit the size of the remote database and reduce synchronization times. Please select one of the following options:

- No subscription rule (remote user will receive all records they have access to).
- Account-based rule (remote user will receive records based on account level information).
  - Only accounts that are in the user's region.
  - Only accounts in a specific location (city, state, ZIP, etc.). Please specify:
  - Other (please specify):
- Contact-based rule (remote user will receive records based on contact information).
  - Only contacts in a specific location (city, state, ZIP, etc.). Please specify:
  - Other (please specify):
- Other (please specify):

**Please specify the following information regarding your Administrative Workstations:**

1. Please specify the remote access software installed for CRM Sales Software Solutions systems consultant remote access:

- Microsoft Terminal Server       VNC       PC Anywhere

If there is a contact for remote access administration other than your company's Network Administrator, please provide their contact information here:

Name:                      Phone:                      Email:

*Please supply the following information as it applies to the selected method of remote access:*

PC Anywhere Software Version:	Type and Speed of Modem:
Modem Dialup Phone Number:	External IP Address:
External IP Port:                      (if not default) Port is Open firewall: <input type="checkbox"/> Yes <input type="checkbox"/> No	Time Remote Access is available (if restricted): From                      to                      Time Zone:

*If the Rapid Rollout CRM Sales Software implementation will include remote users, this software should be installed on the Synchronization Server as well as the Database Server. Access to the Synchronization and Database Server machines should be such to allow full administrative control to best facilitate the management of the CRM Sales Software Free Trial system. Please note that the Rapid Rollout CRM Sales Software implementation team is not responsible for installing or configuring the remote access software. Rather, they will utilize the installed remote access software to establish a connection to the Administrative Workstation for the CRM Sales Software Solutions system consultant.*

***\*IMPORTANT: The CRM Sales Software Solutions systems consultant resource will need to gain access and will require "Local Admin Rights" to the database server, and the FTP/Sync machines to perform IT duties at your site. Any security issues preventing this access will prevent your included CRM Sales Software Solutions systems consultant service from being provided.***

Client Database Configuration / Purchased Licenses  
Date Form Filled out:

Client Name:

**System / Database Configuration: Sales Client 5.2 – To Be Filled Out By CRM Sales Software Solutions Team**

Serial #	Description (Items in bold are common items)	Qty	Notes
	<b>CRM Sales Software Free Trial Enterprise Workgroup Administrator Server License</b>	1	To be Installed
	CRM Sales Software Free Trial Remote office server		
<b>Not Needed</b>	<b>CRM Sales Software Free Trial for Marketing License</b>	1	Core product in 5.x
	<b>CRM Sales Software Free Trial for Sales Standard Client License</b>		
	<b>CRM Sales Software Free Trial for Sales Advanced Client License</b>		
	<b>CRM Sales Software Free Trial Advanced Sales Bundle</b>		
	<b>CRM Sales Software Free Trial Synchronization Server</b>		
	<b>SQL Server License</b>	1	
	CRM Sales Software Free Trial for Support Client License		
	CRM Sales Software Free Trial for Support Server		
	CRM Sales Software Free Trial e-Viewer License		
<b>5M-00000G1-FT58000-0000000</b>	<b>Crystal Reports Pro V.8.x</b>	1	<b>Universal CRM SALES SOFTWARE Serial Number</b>
	WEB Ticket Customer		
	WEB Ticket In-house		
	Lead Capture		
	<b>CRM Sales Software Free Trial Maintenance</b>		1 year
	<b>CRM Sales Software Free Trial Support</b>		1 year
	Performance Manager		
	Alert Messaging – Knowledge Sync		
	Dupe Check		
	30-day On-Line Training License		
	90-day On-Line Training License		

**Notes on Installation:**