

PowerEntry FOR SALESLOGIX



PowerEntry v6.1 for SalesLogix FAQs

Licensing

How would I try PowerEntry v6.1 for SalesLogix?

You can request from your partner an evaluation copy of PowerEntry v6.1 for SalesLogix. The license expires after 15 days. Please see Installation for details of how to implement this evaluation.

How is PowerEntry v6.1 for SalesLogix licensed?

PowerEntry v6.1 for SalesLogix is licensed for every active SalesLogix user, including LAN and web license users. The licenses are registered using your SalesLogix CustomerID and this needs to be supplied when you order PowerEntry.

Installation

What is the install process for PowerEntry v6.1 for SalesLogix?

There are two parts to the install process. The IntelliSearch component must be installed on all your SalesLogix workstations and / or web server, and the PowerEntry bundles applied to the SalesLogix database and released to all your users. Full documentation is supplied for the installation and configuration process.

Upgrades

How can I upgrade from PowerEntry v5 to PowerEntry v6.1?

For implementations prior to PowerEntry v6.1 for SalesLogix, PowerEntry will need to be completely uninstalled. Existing customisations will need to be redeveloped. Because PowerEntry v6.1 for SalesLogix has been completely developed in active scripts and forms, those existing customisations are no longer compatible. However, the new open framework makes customisations in v6.1 easier to develop and implement and they will be future proofed against product updates.

What is IntelliSearch?

IntelliSearch is QGate's new data matching technology. Sophisticated fuzzy matching returns potentially matching data when you enter accounts or contacts in PowerEntry. The IntelliSearch component provides both a visual interface used in the LAN client and a non-visual results return used in the web client. IntelliSearch also is the component which manages licensing.

Integration

How can I integrate PowerEntry (IntelliSearch) with other applications?

If you are developing custom SalesLogix solutions, IntelliSearch provides a full object oriented component that can be called from other external applications providing the same fuzzy look up capabilities for data input by those external applications.

How can I integrate with address management solutions (ie QAS, Satori)?

PowerEntry can integrate with third party address data. It features completely new address management integration for address verification from 3rd party address data such as Satori, QAS and Avalara. By enabling the creation of country profiles for address management, you can define the way in which address information is captured and managed country by country. You can also assign a different third-party PAF (postal address file) for each country. PowerEntry for SalesLogix v6.1 delivers the same address management capabilities on editing addresses as it does for adding them.

Development

How do I make customisations in PowerEntry v6.1 for SalesLogix?

PowerEntry for SalesLogix v6.1 has been completely reengineered in active script. It now comprises two elements: one is QGate's system components, the other a fully customisable framework. This enables PowerEntry to be openly developed to suit the business requirements of your SalesLogix solution, and remain future proof against subsequent releases by QGate of the system components.

Search

How do I make best use of IntelliSearch?

PowerEntry v6.1 for SalesLogix harnesses the sophisticated data matching of QGate's IntelliSearch technology to find potentially matching data within your SalesLogix database, either at point of capture or when you're searching for accounts and contacts. IntelliSearch is not based on Starts With logic. Instead, it uses the complete term you enter in the fields it searches from. So, for example, "Bill" at "Communications" would return all the Bills, Billys, Wills, Willys and Williams at any account with Communications in the title; looking for "Manufacturing" in London would return all the accounts in London with Manufacturing in their names. What it returns depends on the degree of likeness you're looking for against your search term (you can have anything from 60% to 100% likeness). IntelliSearch uses match scoring algorithms to do this and it finds matches irrespective of sequence, spelling errors, word segmentation, phonetic likeness, synonyms, noise words or name variations. It's also gender aware so a search for Paul would not find Paula.

I want to do a simple "starts with" search – can I still do that?

You can but this is not the best way to use IntelliSearch. It's very powerful and could return more results than is useful. For example, you could type "Rich" into the IntelliSearch contact look up but IntelliSearch would return all the contacts whose first or last names included "Rich" or something similar. If you set IntelliSearch to return results of 100% likeness you would only see those that included your exact search term.

Web support

How would I use PowerEntry v6.1 in the SalesLogix web client?

PowerEntry v6.1 for SalesLogix has been developed for use with the SalesLogix web client. Further information will be available soon. You will still be able to harness the power of IntelliSearch as you perform duplicate checks when you enter accounts and contacts but the current release will not support independent searching for accounts and contacts.

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