Sage SalesLogix v8.0

Quick Reference Card

for the Web User

Find Records Fast	
Using Filters	On any list view, in the Task Pane, in the **Filters** section, expand the filters and select the check boxes for the information you want to see in your group.
Using Lookups	Click the (Lookup) tab in a list or detail view, or right-click an item in the Navigation Bar and select the **Lookup** option (not available for all views).
Using SpeedSearch	Click the (SpeedSearch) button in the toolbar. You can: • Match on all words any words the exact phrase • Use natural language • Search on the root by thesaurus on sound like • Use Boolean search criteria
Seeing a list of recently-viewed items	On the tool bar, click **Recently Viewed**, point to the record type, and select an item from the list.

Work the Way I Want To	
Using groups	Create groups for records you want to track.
Accessing your groups	On a list or detail view click a group tab, or in the title bar click **Groups**.
Selecting records to create a group	1. From a list view, select one or more records. To select more than one record, hold down **[Ctrl]** as you click each item. 2. In the Task Pane, under **Common Tasks**, click **Save Records as Group**. 3. Use **Query Builder** to define group properties, layout, sorting, or defaults. 4. Click **OK**.
Sharing your group with other users	1. Open the list view containing the group you want to share. 2. Right-click the group tab, and then select **Share**. 3. In the **Share Group** dialog box, click **Add**. 4. Click the **Users**, **Departments**, or **Teams** tab, select who you want to share your group with, and click **OK**. 5. Click **OK**.
Setting user options	• On the **Tools** menu, click **Options**, and use each tab to set specific options.

Commonly Used Icons		
Working with Records	**Finding Sales and Marketing Features**	**Finding Service and Support Features**
Find	Accounts	Contacts
Calendar	Contacts	Ticket List
Save	Leads	Contracts
Reset	Opportunities	Returns
Refresh	Sales Orders	Standard Problems
E-mail	Processes	Standard Resolutions
Web	Products	Defects
View address	Packages	Products
Add	Library	Packages
Associate	Campaigns	
Delete/Remove	**Moving Around**	
Edit	First	Next
	Previous	Last

Get Help	
Finding scenarios	On the menu bar, click ?, and then click **Getting Started Guide**.
Opening online Help	• Click ? (Help) to open the help system.

Get My Tasks Done	
Receiving alerts	See Alerts and Past Due notifications in the menu bar.
Viewing my activities	Use the **Activities List** view to manage your scheduled activities and events by type. Select the time frame for the displayed items. On the Navigation Bar, click **Activities**.
Using my calendar	Manage your time and keep track of scheduled activities and events. View your schedule by the day, week, month, or year. You may also be able to view other users' activities and events. • On the Navigation Bar, click **Calendar**.
Scheduling a call, meeting, or to-do	On the **Schedule** menu, click the activity to add.
Inviting other users	Use the **Availability** tab to invite other Sage SalesLogix users to a phone call or meeting.
Completing an activity	Do one of the following: • Open the activity and click **Complete**. • On the **Schedule** menu, click **Complete Activity**.
Adding records	On the **New** menu, select record to add.
Checking on notes and history	Open a record's detail view and click the **Notes/ History** tab. Use the filters to narrow the list.
Using the Dashboard	Display and interact with a variety of performance and analysis tools in a dashboard format. • On the Navigation Bar, click **Welcome**.
Using Sage SalesLogix Integration Module	• To install, on the login page click **Install Enhancements**. Features include: • Microsoft Outlook Integration • Drag and drop – files and Microsoft Outlook e-mails • Export to Microsoft Excel • Mail Merge

Communicate Effectively	
Sending an e-mail	On the **Write** menu click **E-mail** or click next to an e-mail address in a detail view.
Creating form letters, e-mail, and faxes	1. On the **Write** menu, click **Mail Merge**. 2. Use the **Merge** and **History** tabs to select a template, records to include, the type of output to create (e-mail, fax, file, or printer), and history options. 3. Click **Merge**.

Meet My Goals	
Adding and qualifying leads	Do one of the following: • To add a single lead, on the **New** menu, click **Lead**. • To import a list of leads, on the **Tools** menu, click **Import Leads**. Use the lead qualification check boxes on the Lead Detail view to validate information and determine if the lead is ready to be converted to a contact and account. To convert a qualified lead, click **Convert Qualified Lead**.
Creating and launching campaigns	To create a campaign, on the **New** menu, click **Campaign**. Select targets, define stages and tasks, and add products to a campaign. When the campaign is ready, click **Launch**. Use the stages and tasks and target responses to monitor the campaign's progress and success.
Pursuing opportunities	On the **New** menu, click **Opportunity**. Use sales processes to manage your sales pipeline. When an opportunity is won or lost, change the **Status** to **Closed-Won** or **Closed-Lost** and enter reasons for closing the opportunity.
Making sales orders	On the **New** menu, click **Sales Order**. Use sales orders to track products purchased by an account.
Adding and processing tickets and defects	On the **New** menu, click **Ticket** or **Defect**. The **Area**, **Category**, and **Issue** boxes determine who it will be assigned to. Use the **Punch In/ Punch Out** button to log time against a ticket as you are working on it. When processing is complete, change the **Status** to **Closed**.
Enabling returns	Create authorization for a customer to return a product. On the **New** menu, click **Return**. A return must be associated with a ticket. Use the Return Detail view to add product and shipping information. After the return is complete, change the **Status** to **Closed**.
Creating and assigning contracts	On the **New** menu, click **Contract**. Contracts may be based on days, hours, incidents or monetary value, or may be perpetual. In the account's detail view, click the **Contracts** tab to see if a contract exists, and the type of contract.