Infor CRM SLX v9.1

Quick Reference Card

for the Service and Support User

Find Records Fast

Finding one record	Use **Quick Find**: In the title bar of a list or detail view, click the button.
Finding records and creating a group	Use **Lookups**: On the **Lookup** menu, point to the type of record you are looking for, click the criteria you want to look for, enter the search information in the box, and then click the (Find) button. Select **Create a temporary group containing all results**, and then click **OK**.
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 the **History** button, and select an item from the list.

Commonly Used Icons

Finding Service and Support Features	Working with Records	Moving Around
Contacts	Find	First
Ticket List	Calendar	Previous
Contracts	Ellipsis	Next
Returns	E-mail	Last
Defects	Web	Back
	View address	Forward
	Save Undo	List View

Work the Way I Want To

Using groups	Create groups for records you want to track.
Accessing your groups	Do one of the following: • On a Main view, in list view layout, click a group tab. • On the **View** menu, click **Groups**.
Selecting records to create a group	1. From any Main view, in list view layout, select one or more records. To select more than one record, hold down **[Ctrl]** as you click each item. 2. Right-click anywhere in the grid and click **Add Selected Members to New Group**. 3. Use **Query Builder** to define group properties, layout, sorting, appearance 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 select **Share Group**. 3. In the **Owner Assignment** 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.
Managing customer service defaults and options	On the **Tools** menu, point to **Manage**, and then click **Customer Service Defaults**. On the **Tools** menu, point to **Manage**, click **Customer Service Options**, and use each tab to set specific options.

Get My Tasks Done

Receiving reminders	Use **Activity Reminder** to notify you of your alarms, past due activities, and unconfirmed activities. • On the **Tools** menu, click **Activity Reminder**.
Viewing my activities	Use **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** or press **F7**.
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** or press **F4**.
Scheduling a call, meeting, or to-do	On the **Schedule** menu, do one of the following: • Click the type of activity you want to add. • Press **Shift+F3** for a phone call. • Press **Alt+F3** for a meeting. • Press **Ctrl+F3** for a to-do.
Inviting other users	Use the **Members** or **Attendees** tab to invite other CRM users to a phone call or meeting.
Completing an activity	Do one of the following: • Right-click the activity you want to complete and click **Complete Activity**. • On the **Schedule** menu, click **Complete Activity**.
Adding records	On the **Insert** menu, select the type of record you want to add – contact, ticket, defect, return, or note.
Checking on notes and history	Open a record's detail view and click the **Notes/ History** tab. Use the filters to narrow the list.

Get Help

Finding scenarios to walk you through tasks	To find the Getting Started Guide go to **Start> Programs> Saleslogix>Documentation**.
Opening online Help	See help for a specific page or form or to search for a topic in the help system. • Click the **Help** button or press **F1** to open the help system.

Communicate Effectively

Sending an e-mail	Do one of the following: • On the **Write** menu, click **E-mail**. • On the toolbar, click the **E-mail** button. • Next to an e-mail address in a detail view, click the **E-mail** button.
Making notes on a record	On the **Insert** menu, click **Note**.
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

Creating and assigning activity contracts	On the **Insert** 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.
Adding and processing tickets and defects	On the **Insert** 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 **Insert** 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**.
Adding comments, description, or resolution information	Use the **Comments**, **Description**, or **Resolution** boxes to include additional information about tickets, defects, or returns. To insert your user name, date, and time information press **Shift + F9**.